Kenexa 2x BrassRing®

Release 13.0

Product Update Guide with Configuration

[Internal Use Only]

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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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Approvals – Abridged View of Reqs

This feature allows users to configure an abridged view of requisitions sent via eLink for approval and displayed on customary browsers or mobile devices. This feature applies to sequential approval routing of reqs with custom fields.

Product RDP538	þ 2x BrassRing	þ Workbench Self-Service
Visible Changes	þ No – requires specific conditions / configuration for visibility..	
How do I get this feature?	þ Configuration required – contact your Kenexa Support Team for implementation details.	

Feature Description

This feature allows users to configure an abridged view of requisitions sent via eLink for approval during sequential approval routing. Currently, when an approver receives an eLink message requesting requisition approval, the recipient must scroll through the entire requisition to approve it. This feature allows designated approvers to view an abridged version of a requisition when they open an eLinked approvel request.,

The req approval abridged view is available both in customary browsers and on mobile devices.

- Customary (non-mobile) browsers show all standard req fields, as well as the custom fields configured to display for the abridged view
- Mobile devices show the standard fields configured for the mobile display, as well as any custome fields configured for both mobile display and req approval abridged view.

User privilege also impacts req field display, consistent with 2xB requisition configuration.

2xB User Experience

To see the abridged view, approvers must:

- Be a member of an approval group for which the abridged view is enabled
- Receive an eLinked approval request for a req whose req form has a defined abridged view
- Click the eLink to view the approval request.

The req approval abridged view defined for that req form displays in either a web or a mobile browser.

Limitations and Known Issues

The Rule-based approval process (SmartApproval) is out of scope.

How Do Clients Get this Feature?

This feature is controlled by new approval group and req template attributes. Please contact your Kenexa Support Team or Certified Workbench User for more information about enabling this feature.

Workbench Self-Service Certified Users

Configuring this feature requires enabling the abridged approval view of the req form for desired approval groups, then selecting the custom req fields that you want to appear in the abridged approval view.

To enable abridged view for approval groups:

1. Go to **Tools > Forms > Approvals.** The approvals group page displays.
2. Select the **Edit** icon for the desired group. The Edit Approval Group screen displays.

3. Check **Enable abridged Req view**.
4. Click **Save**.

To select the custom fields to be shown for the abridged req approval view:

1. Go to **Tools > Forms > Reqs > Req Forms**. The Req forms page displays.
2. Select **Administer Req Fields** for the desired req form. The Administer Req Fields page displays.

3. Click **Define Approval Abridged View**. The Define Approval Abridged View displays with the form's active custom req fields.

4. Click **Add** to move desired Available fields to the Selected fields column. Selected fields cannot be repositioned. The fields display in the same order in the approval abridged view.

> **Note:** All active "Selected" fields display on the abridged approval view. Fields that have been selected can later be made inactive. Those inactivated fields appear with the label (INACTIVE) in the Selected pane of the "Define approval abridged view" screen (but do not display on the abridged view). Removing INACTIVE fields from the Selected column deletes them (rather than returning them to the Available pane).
>
> **For Mobile Displays:** Only those custom req fields that are configured in common for both "Define Mobile display fields" and "Abridged Req view" feature will be displayed on the eLink accessed via Mobile browser.

5. Click **Save**.

Defining Mobile Display Fields

When configuring the req approval abridged view for mobile devices, users must ensure the selected custom display fields configured in "Define approval abridged view" are also selected in "Define mobile display fields." For an eLinked req approval request, mobile devices display only those custom req fields chosen in *both* configurations.

For example:

· Standard_1, Standard_2, Custom_1, Custom_2, Custom_3, Custom_4 are defined mobile display fields
· Custom_3 and Custom 9 are defined approval abridged view field.

The approval abridged view displays Standard_1, Standard_2, and Custom_3 in the mobile device.

Define Mobile Device Req Display

To select custom requisition fields for mobile device display:

1. Select **Tools > Forms > Req forms > Define custom req fields**.
   The Custom fields listing page opens in Workbench.

2. Click **Define mobile display fields** in the Actions menu. The Define mobile display custom fields window opens.
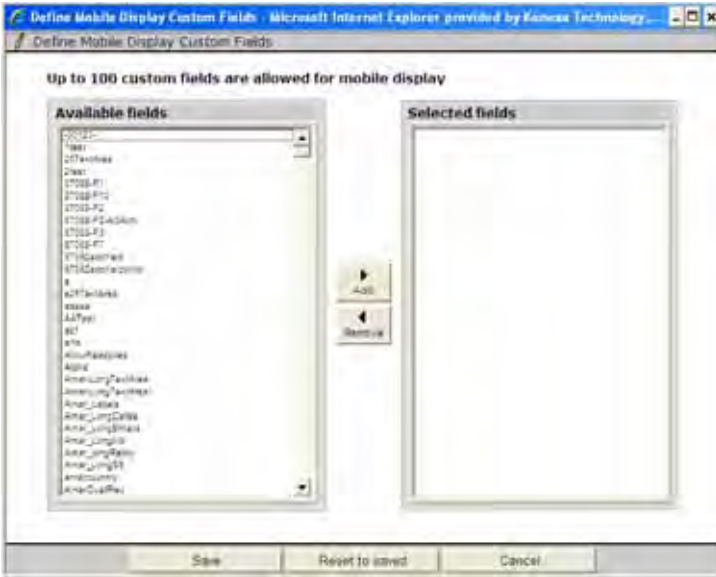
The **Available fields** pane displays a list of the available active custom fields not yet selected. Inactive fields no longer display in the Available pane. The **Selected fields** pane displays the list of client's custom active, as well as any inactivated after selection.

> **Note:** All active "Selected" fields display on Mobile devices. Fields labeled (INACTIVE) do not display on the Mobile device. Removing INACTIVE fields from the Selected column deletes them.

3. Select custom fields to display on your mobile device in the **Available fields** list and click **Add** to add them to the **Selected fields** list. You can select one, some, or all of them.
4. Click **Save**.

Attachments – Restricting Types Candidates Upload

This feature allows organizations to restrict the attachment file types candidates are allowed to upload, at both the requisition template level and by Talent Gateway.

Product RDP478 Rel 13.0	Þ 2x BrassRing	Þ Talent Gateways
Visible Changes	Þ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	Þ Configuration required – see implementation details below.	

Feature Description

New requisition template and Talent Gateway attributes allow your organization to restrict the attachment file types candidates that can upload.

The current set of allowed types is:

.avi	.bmp	.csv	.doc/.docx*
.gif	.htm	.html	.jpg
.mov	.mp3	.mp4	.mpeg
.mpg	.ppt/.pptx*	.pdf	.rtf
.swf	.tif	.txt	.wmv
.xls/.xlsx*	.xml		

* Requires client level setting "MS Office 2007 attachment support"

Those allowed file types can be restricted at either or both levels: req template for reqs being applied to and Talent Gateway through which a candidate is applying. The restrictions will also apply when candidates upload attachments for Gateway Questionnaire workflow or edit their Talent Gateway profiles.

Candidate Experience

As shown in the following figure, the list of *allowed* files types is displayed for candidates who are uploading attachments. If a file type is restricted for either the Talent Gateway or *for any of the reqs* being applied to, it does not appear in the list.

If candidates select a file with a restricted type, when they click the Upload button, they will see the following error text (also shown below):

"The attachment file extension is not valid."
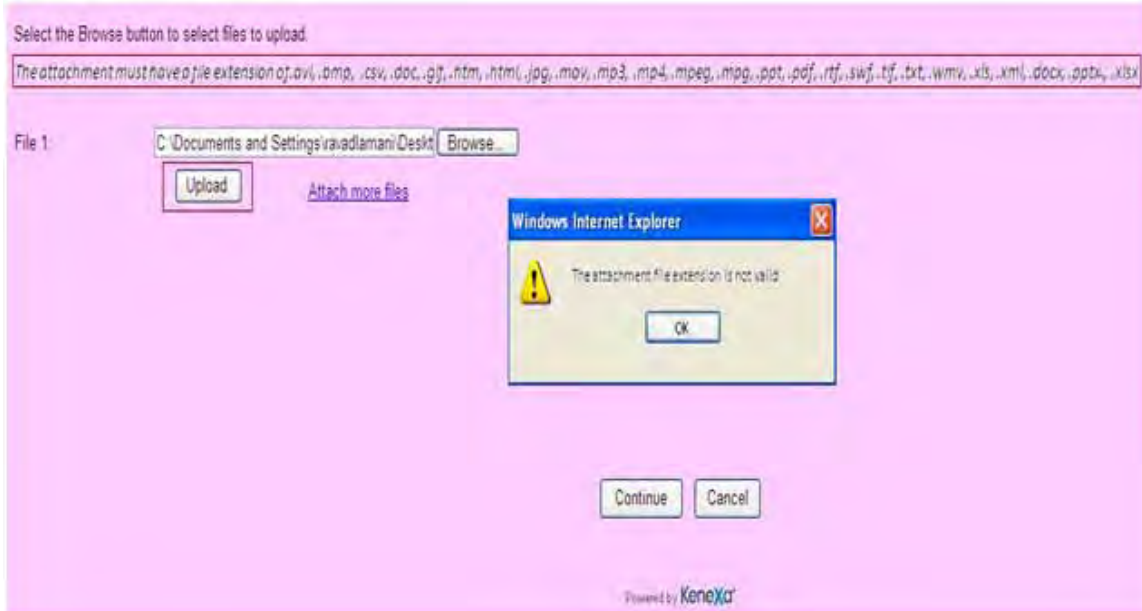
A warning message also displays on the Attachments page if all file types are restricted, either at the at the Talent Gateway level or at the template level for reqs being applied to.

How Do Clients Get this Feature?

This feature is controlled by new attributes for the req template and Talent Gateway. Please contact your Kenexa Support Team or Certified Workbench User for more information.

Workbench Self-Service Certified Users

Use the new "Restricted file types" attributes for the req template or for the Talent Gateway to restrict the attachment file types that are accepted from candidates for upload.

Restricting at Req Template Level

Tools-> Forms -> Reqs -> Req forms -> Edit form attributes [for selected form]

Select the file types to be restricted and **Save**. Selected types will not be allowed for upload.

Workbench Settings for Req template

Restricting at Full Talent Gateway Level

Tools -> Talent Gateway -> Admin -> Edit [selected Full Talent Gateway]
Select the file types to be restricted and **Save**. Selected types will not be allowed for upload.

Workbench settings for TG

The "union" of the sets of restricted file types for the Req template(s) and the Talent Gateway is the set of restricted file types for each upload. If no "restricted file types" have been selected at the Talent Gateway or req template level, the candidate will be allowed to upload all of the existing default file types (no change in current behavior).

Previously uploaded attachments are not affected by newly-instituted restrictions.

Candidate Field Association

Candidate form field association (CFA) creates a relationship between fields so that users can only choose valid values on candidate form fields. CFA is quite similar to requisition field association (RFA), which has been available for several years.

Product	ᵽ 2x BrassRing	ᵽ Candidate Imports
LDP054 Rel 13.0	ᵽ Workbench Self-Service	
Visible Changes	ᵽ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	ᵽ Configuration required – contact your Kenexa Support Team for implementation details.	

Feature Description

Candidate form field association increases data integrity and enhances user experience. Once a selection is made in one field, users don't need to scroll through a whole list of options in another field that aren't even relevant anymore. Key features of Candidate form field association (CFA) are:

- Filter options

    Shows a subset of options based upon the selection of option(s) from another field on the same form.

- Default option

    Defaults an option based upon the selection of an option from another field on the form

- Field associations are supported in:

Candidate forms (accessed in 2xB)	Document subsidiary forms • Add via Talent Gateway • Edit via 2xB
eLinked forms	Agency Manager • Agency contact questions • Candidate questions • Candidate – attached forms
Basic Talent Gateways • Default questions • Attached form fields	Employee Referral • Referring employee questions for non-GQ flow • Referring employee – attached form(s) • Referred Candidate Questions • Referred Candidate attached form(s)
Talent Gateways • Default and job-specific questions (when both parent & child included) • Job specific questions • Attached forms	Gateway Questionnaires (JSQ widget ONLY)
Event Manager forms	

Rules for CFA

- A child field can have only one parent, but a parent can have multiple children
- If the total number of options exceeds 200 options, but the field association filters the list down to less than 200, the child field is STILL presented as a scaled select.
- If the parent or child field is hidden on a req template, no filtering will occur
- When updates are sent, historical data will not be impacted
- Field level configuration within Workbench to designate Parent and Child fields

- Field association import via Excel Worksheet and XML uploads
- Autofill fields are supported for parents only. When an Autofill field is a parent, all the child field values are derived based on the autofilled parent value.

2xB USER EXPERIENCE

Configuration of field association does not affect look or feel of form or fields. Before you select a parent option, the child field shows the full list of values.
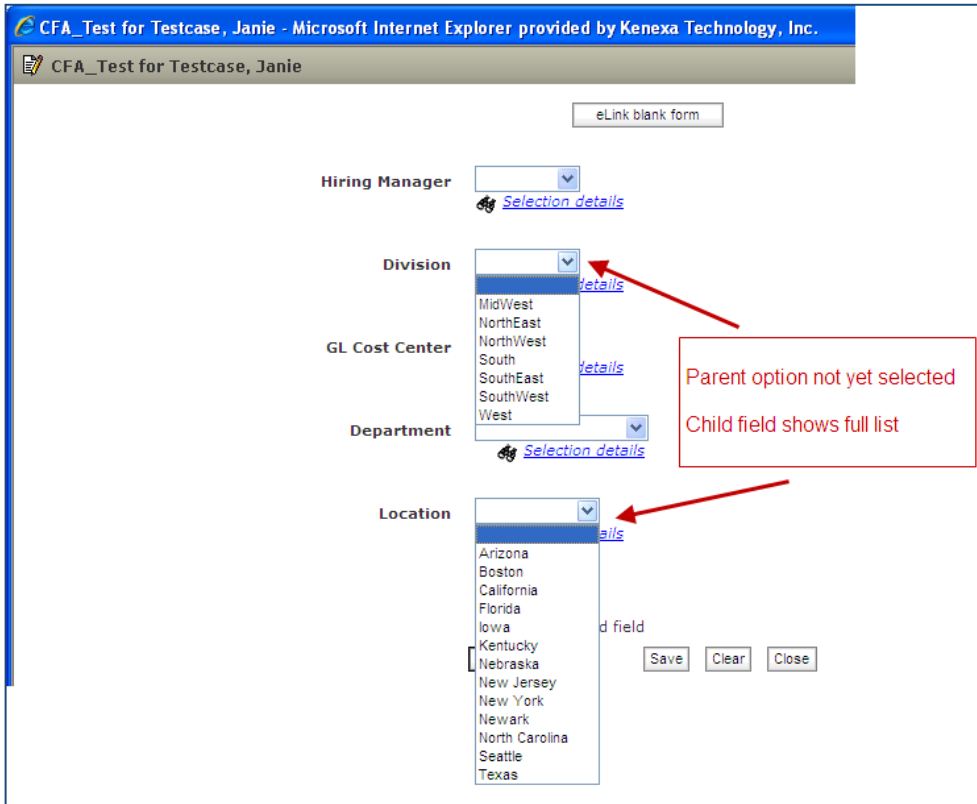
Once an option is selected in a 'Parent' field, the system displays "Please wait…" and temporarily disables the form during the database call to get the appropriate list of values for child fields. Database call time is dependent on amount of data being retrieved.

When the data is retrieved, the system displays a check mark for a few seconds beside all child fields that have been filtered or defaulted as a result of the 'parent' selection. Child field option lists are also filtered/defaulted.
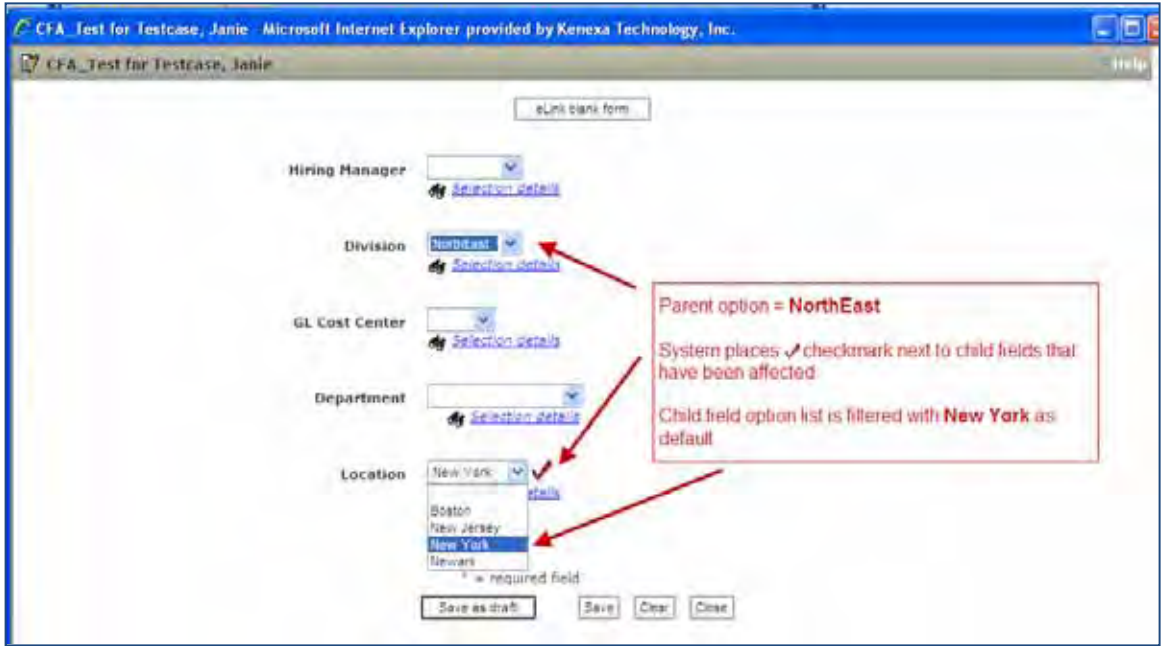
Parent Fields

Parent fields can control the selection(s) presented to the user in a subsequent field or fields.

Parent field types include:

- Single Select

- Radio buttons

- Multi-select

- Checkboxes

- Option source =
  Maintain Custom List
  Pull options from existing list, and includes "query select" lists such as Active managers, Active recruiters, Active enterprise users, All active users, Specific Codes, All open reqs, All pending reqs, or All reqs

- Autofill (with source of):
  Single Select
  Radio button
  Option source =
  o   Maintain Custom List
  o   Pull options from existing list = Options from other form fields

Field types that cannot be a parent:

- Field types that don't have options:
  Date
  Text
  Text area
  Label
  Grid
  SSN
  Email
  Numeric

- Autofill with source of:
  Multi-select
  Checkbox
  Option source = Pull options from existing list
  other than = 'Options from other form fields'

Hidden parents: If a parent field is hidden (by user type or language) on a specific candidate form, *no* filtering will occur in child fields.

Changing parent values: When the selected option within a parent field is changed, the child option list is changed.

Circular relationships: Circular field associations are not supported. For example:

- if Department is a parent to Location
- and Location is a parent to Business Group,
- Business Group *cannot* be the parent to Department

Child Fields

In child fields, the data (or options) presented depend upon a selection made in another field, the parent field. A child field has only one parent. Child fields can initially contain a full option list, but, based on the parent option selected, only a sub-set of the full list of options may appear.

Child field types:

- Radio
- Single-Select
- Checkbox
- Multi-select
- Text box
- Text area
- Numeric
- Email
- Query-select
- Pull from list

Excluded field types:

- Date
- Label
- Grid
- SSN
- Autofill

A child list can be affected by a parent field in several ways. The child list can show:

- A full list of options
- A full list of options with a default option selected
- A full list of options with multiple defaults selected (if multi-select field)
- A subset of options
- A subset of options with a default option selected
- A subset of options with multiple defaults selected (if multi-select field)
- A single value
- A single value with the option defaulted

Child fields *can* be a parent to other field(s) on form, but not to a sibling field. For example, if "Country" is the parent field of both the "State" and "City" child fields, a selection in "State" will have no impact on the "City" list of options.

For child fields with multi-value parents:

- If the parent is multi-select or checkbox, the child field cannot be a numeric, text box, text area or email type.
    - These child field types do not support multiple options being displayed.
- If multiple parent options are selected, the child will be populated with a combination of ALL options associated with ALL parent selections.

Inactive child options: the status of a child option will not impact list filtering

Hidden child: if a child field is hidden on the form (either by user type or language), no filtering or default selections will be made within the child.

Language/locale: if a child option is not translated into a specific language that option will not appear within the filtered list when the form is viewed in that language.

2xB Field Association Workflow Business Rules

- You can make a selection in a child field prior to selecting an option in the parent field. However, if you subsequently select an option within the parent field, the previous selection within the child field is lost.

- If a parent or child option has not been translated for a specific language, that option will not appear on the form when viewed in that language. This may cause some field associations to be lost.
- During form creation, when the Clear button is selected, all selections made on the form will be removed and all filtered lists will revert to displaying a full set of options with no defaults.
- A "Please wait" icon may be displayed on the screen when a parent option is selected and child option lists are re-rendering. While the child option lists are being rendered, all page controls will be disabled.
- Fields with scaled select functionality will remain scaled selected, even if the filtered list of options is less than 199. For example, Department is configured with 300 individual department options. When viewed on the Candidate form (prior to any filtering occurring), this field displays as a scaled select. Assume Department is a child of another candidate field, Org Group, and when Org Group = Corporate, the Department list is filtered to display only 3 options. When Org Group = Corporate, the Department list will be filtered, however, it will still remain a scaled select. In order to view the list of available values, the user must click the "List" button for the scaled select.
- Select field options functionality will be IGNORED for any field on the form that has been identified as a parent OR a child.

Talent Gateways

Functionality described in this section applies to both standalone and Global Talent Gateways with the Talent Gateway special configuration setting **Enable field associations.**

Default Questions and Job Specific Questions

If the Talent-Gateway candidate form has 'parent' and 'child' associations and the fields are selected for display on the Talent Gateway, the Talent Gateway respects the field association.

Business rules

- If a Talent Gateway question is configured as a field association parent or child, but the associated field(s) are *not* selected on the Talent Gateway, the field(s) operate as stand-alone fields and no filtering is applied.
- Parent and child fields can be within Default Questions, as well as within the Job Specific Questions.
- A parent can be a default question and a child can be a job specific question.
- A parent can be a job specific question and a child can be a default question.

In a multi-apply scenario, a single JSQ question can appear multiple times for each job a candidate applies to. If a JSQ field is a field association parent question, then the values selected in the parent question(s) must be the same for the child field to filter properly.

To ensure that each of the JSQ parent fields have the same value, the system will automatically apply selections made in one of the questions to the other corresponding parent field questions. This will ONLY happen if the JSQ question/s are field association parent fields.

The child question will show the filtered options of the parent selection.

Example: Parent is non-default, child is Default, and candidate applies to two reqs with the same questions

Questions page looks like the following:

Please answer a few questions

Child question listed here

1. **Questions for Job 1**

2. **Questions for Job 2**

When the candidate selects an option for Job 1, it is automatically selected for Job 2 as well, so the two fields will *always* be the same.

- When parent option is selected, the check mark will **not** be shown next to child fields when the page is being refreshed to filter child options, to avoid confusing candidates as to what the check mark may mean.

Forms attached to Gateway

- If candidate form that has 'parent' and 'child' associations is selected for display on the Talent Gateway (attached forms), the Talent Gateway respects the field association.
- Subsequent TG submissions by the same candidate/profile will pre-populate previous responses in the Attached form fields. If one of the pre-populated fields is a parent field, the child field options will be automatically filtered.

Candidate Portal – Document subsidiary forms

Document sub forms support field association on Talent Gateway for candidates.

Employee Referral Talent Gateways

The Employee Referral Talent Gateway is essentially a TG that has the **Enable referral Talent Gateway** setting checked. However, this setting does allow different workflows and different configurations. If the Talent Gateway special configuration setting **Enable field associations** is checked, field associations are supported for these workflows, as described in the TG section above:

- Referring employee questions for non-GQ flow
- Referring employee – attached form(s)
- Referred Candidate Questions
- Referred Candidate attached form(s)

Gateway Questionnaires – JSQ widgets supported

Gateway Questionnaires are, for the most part, out of scope for the field association functionality due to architectural differences. Field association within a GQ may be supported in a future project.

However, if a GQ contains a JSQ widget, and the TG questions within the JSQ widget have field association(s), then the parent/child relationship within the JSQ widget fields are supported.

In a multiple-apply situation, the GQ takes all 'common questions' for all selected jobs and asks them once. This is different behavior than in the TG apply flow.

Basic Talent Gateways

Default questions

There is no Talent Gateway special configuration setting **Enable field associations** to honor on a Basic Talent Gateway. Any Default questions that have Parent / Child field associations will filter child lists and set field defaults as configured**.**

Forms attached to Basic TG

There is no Talent Gateway special configuration setting **Enable field associations** to honor on a Basic Talent Gateway. Any questions on forms selected in the **Forms attached to Gateway** that have Parent / Child field associations will filter child lists and set field defaults as configured**.**

Agency Manager

Functionality described in this section applies to both standalone and Global Agency Managers.

Agency questions

Any selected questions for Agencies to answer during the submission process that have Parent / Child field associations will filter child lists and set field defaults as configured.

Candidate questions

Any selected questions sent to candidates upon Agency submission that have Parent / Child field associations will filter child lists and set field defaults as configured.

Candidate attached forms

Any questions on forms selected in the **Forms attached to Gateway** that have Parent / Child field associations will filter child lists and set field defaults as configured

How Do Clients Get this Feature?

This feature requires an initial import of associations (relationship between parent/child values), performed by Kenexa staff. Please contact your Kenexa Support Team for more information about enabling this feature.

Workbench Self-Service Certified Users

For configuration of CFA, you should coordinate with the Kenexa Support Team for the initial import of your field associations. You can maintain field associations for fields after they are set up.

Tools > Forms > Candidate Forms > Administer form fields [for selected form] > Add | Edit field > Define field attributes

The Parent checkbox is disabled and grey for any field type that can't be a parent; similarly with the Child checkbox.

The 'Show children' button only shows the children that have been uploaded with field association values for that parent, and likewise for the 'Show parent' button.

The 'Display full list with default selection' checkbox allows you to set a default for a full list of child options without having to UPLOAD the full list of child options. You only need to upload the option or options that you'd like to have defaulted.

A new Export field association action on the Administer form fields page allow you to export the child associations for each parent candidate form field
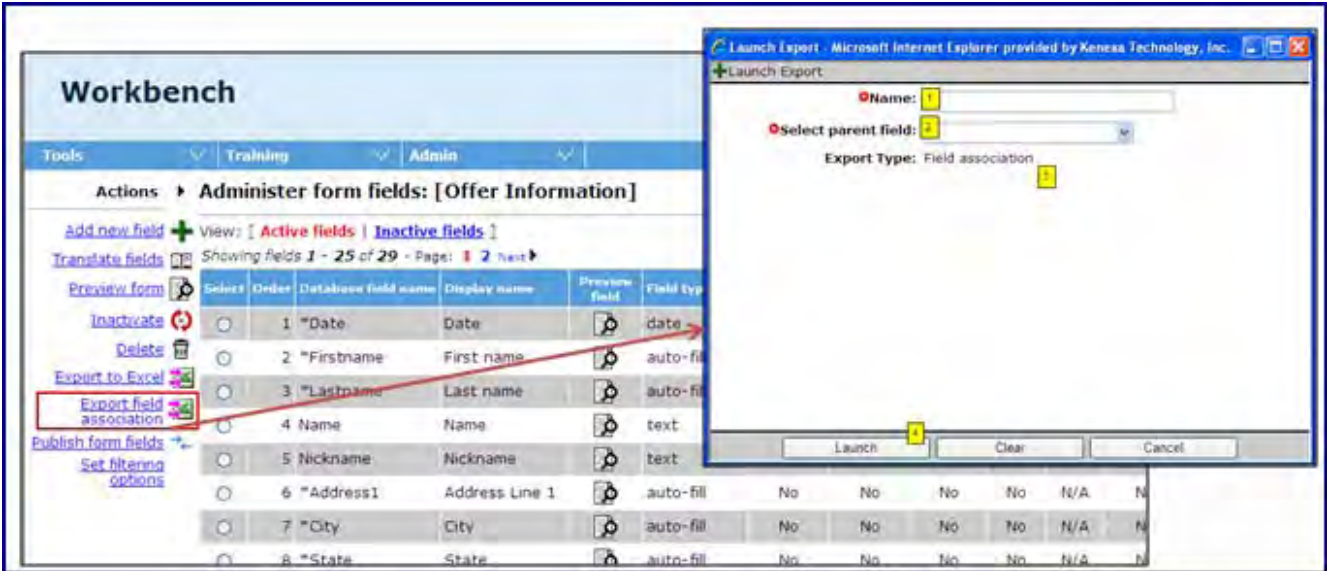
Kenexa Tasks

Configuration requires:

- Identification of Parent / child fields, configured at field level.
- Setup of relationship between parent/child values:

  - All initial uploads are performed by Kenexa staff via Workbench Excel import tool.

  - Maintenance is done by client through XML import. It is highly recommended for clients to utilize the XML import configuration for a more automated fashion of field association maintenance.

Import tools are not self-service.

Workbench

For configuration of Candidate field association, you can either go into the fields and identify which fields are going to be parent and/or child and then do the import, or do the import and then, when the client is ready, enable the field attributes.

In order for the child lists to be filtered, the field level configuration must be set. This allows for the field association lists to be uploaded, correct and ready, but 2xB won't start filtering the lists until the client is set with their change management or notification to users.

Tools > Forms > Candidate Forms > Administer form fields [for selected form] > Add | Edit field > Define field attributes

Import Process

Import process is similar to requisition field association import:

- Kenexa personnel provides the client with a pre-formated Excel spreadsheet
- Client fills in the data
- Client sends the completed Excel spreadsheet back to Kenexa
- Kenexa uploads the file through Workbench
- Kenexa provides the status report back to the client

Tools > Import > Profile

Anew Import Type at the bottom of the list is called **Field association (Candidate forms and Document subsidiary forms)**. There isn't a drop down next to it, like on Field association (Req forms) because the import profile tab has the parent form name and question, so there's no need to scroll through the huge list of candidate form fields.

Import File - Properties tab

	A	B	C
1	Client	TS-JBK	
2	Form	CFA_Test	
3	Parent question	Division	
4	Parent type	Candidate	
5			
6	Task Name	CFA export	
7	Environment	Staging	
8	User	Kubicki, Janet	

- Client = Client name (not network path)
- Form = Database form name
- Parent question = Database field name
- Parent type = "Candidate"
- Task name, Environment, User - Not required as all of these things are a part of the actual uplaoding.

Import File - Associations tab

On the Associations tab, the valid columns are the exact same columns as for RFA. The highlighted columns exist in the import file because you can create parent options through the CFA upload. These fields are only required when a parent option is being created.

If you are importing for a parent field that has options that pull from another list, these columns are definitely not required, because you can't create new options for a parent field through this functionality if that parent is getting its options from another source.

Column name	Description/Notes	Valid values	Required / Not Required
Import Action	Will default to **Update**	**Update** or **Delete**	Not required
Parent Option Code	Code for parent option		Required
Parent Option Description (base language)	Description for parent option		Not required
Parent Option Sort Order	Sort order for parent option		Not required
Parent Option Status	Allows client to import parent options with CFA in an *inactive* state and later *activate* them.	**Active**, **Inactive**, A, or I	Not required
Child Type	**Important!**: Differentiator for workbench to know import is CFA vs. RFA	**Candidate**	Required
Child Question	Child question Database field name - *Can* have multiple child questions in one import file		Required
Child Option	can be either Option Code or Option Description - **Beware**: This 'flexibility' can cause issues if the same value exists for *both* codes and descriptions for several options within the options list		Not required
Default selection	Default value is **No** If changing a default selection, the *old* default option (being switched to No) needs to be BEFORE the *new* default option (being switched to Yes)	**No** or **Yes**	Not required
Child Text column (languages)	This column would only be populated for child fields designated as text-based (text area, text box, numeric)		Not required

Because the Child Option accepts *either* Code or Description, *several* options can have the same code or description (not that *an* option has the same code and description, but *multiple* options have the same description). The import will not know which option to associate with the parent.

Process

Candidate field association import via XML allows clients to create, update, or delete candidate field associations, as well as import new parent field options for non-pull from option. The XML import can also be used for the creation of candidate form field associations or the maintenance of already uploaded CFA files. Parent options (for non-pull from list parents) can also be created via XML.

Process:

1. Kenexa personnel engages Kenexa Professional Services Engineering
2. Client identifies the parent child field in the data mapping document
3. Kenexa PSE provides client with a sample XML file and other documentation
4. Client prepares XML file with data to create, update or delete the field associations
5. Client sends 2xB, an XML call using the newly created field association XML schema
6. An immediate XML response will be sent within the same transaction. This response will simply confirm that the feed has been received or not
7. Import will be handled via an off-line asynchronous process due to high level of validation that needs to occur for this type of import
8. Import 'reports' are available to self-service Workbench users via Tools | Task Manager

Notes about importing parent and child values:

When creating new parent options via a Candidate field association import, the parent option description can only be created for the base language. All other translations for the option must be done manually or via a field option upload in Workbench

Also, when creating new parents via a CFA, field associations for the new option or options must be included in the import, otherwise, the full child list will be shown when the new parent option is selected.

When importing a child text field value, it needs to be localized into each language via the import. For instance, if a child text value is only uploaded in English, when adding or editing the form in French, the field association would not populate anything in the child field because a French text translation was not supplied in the upload.

Best Practice Recommendations

- Parent fields should appear above/before child fields.
- Set filtering options & field associations should not be used within the same fields, as options may be filtered out. Field association will take precedence over configurations set in Set filtering options.
- Whenever possible, limit the number of field associations to under 15 total to mitigate performance issues.
- Translate all options to be used in a field association into all purchased languages.
- When you are going to change child defaults, especially for single select or radio button fields, be sure to place the *old* default option (being switched to No) BEFORE the *new* default option (being switched to Yes) in the excel upload spreadsheet or in the XML.

Limitations and Known Issues

- Autofill fields cannot be field association **child** fields
- Extending CFA filtering functionality within the reporting tools, to standard reports, custom reports, Data Export Wizard & Data Insight Tool
- Option filtering functionality within candidate search and filter folder
- For Gateway Questionnaires, Field Association within the JSQ widget IS supported
- Providing Workbench Self-service tools for the maintenance of CFA filtered lists in a manner other then re-importing is out of scope.
- We can not use Publish functionality in Workbench to publish the candidate field association. It mustbe re-imported into the Production environment.
- Talent Gateway: Field Association Parent fields as Job Specific Questions (Multi-apply)   Because field association child fields can only be filtered by one value in a field, parent fields that are selected as Job Specific Questions and show multiple times on the page during apply will have the same value selected for one of the parent field in all other corresponding parent fields.
    - Parent is non-default
    - Child is Default
    - Candidate applies to two reqs with the same questions
    - Questions page looks like the following:
    - Please answer a few questions
    - Child question listed here
    - Questions for Job 1

    -
    - Questions for Job 2

    -
    - When the candidate selects an option for Job 1, it is automatically also selected for Job 2, so the two fields will always be the same.

Candidate Forms – Enhancements

Release 13 includes several enhancements to the flexibility and usability, security, and data integrity of the candidate forms. Enhancements include:

- New field attributes to require a field by user type and to make a field uneditable by user type
- New field attribute to provide configurable help text per form field
- New field attribute for question branching
- New form attribute to upload a form image
- Enhanced layout for candidate forms.

| Product LDP074 Rel 13.0	þ 2x BrassRing	þ Workbench Self-Service
Visible Changes	þ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	þ Specific conditions required – see details below.	

Feature Description

This release makes the design of candidate forms much more flexible, and includes several additional enhancements improving usability, security, and data integrity of candidate forms. Enhancements include:

- New field attributes to: require a field by user type (not just by locale or language) and to make a field uneditable by user type (Release 13 Build 2)
- New field attribute to provide configurable field help text
- New field attribute for question branching, which allows a question to be hidden until another question has a specific response
- New form attribute to upload a form image
- Enhanced layout for candidate forms

Talent Gateway support of certain of these features becomes available in Release 13 Build 2 (February 2012).

Required by User Type

Requiring a field on a candidate form by user type provides flexibility for situations when one user type creates the form (for example, a candidate or a hiring manager) and another user type needs to update the form. This now matches the existing functionality for req forms. If the user completing the form is of a user type selected in this setting, the field is marked with a red asterisk and the user cannot save the form without completing the field.
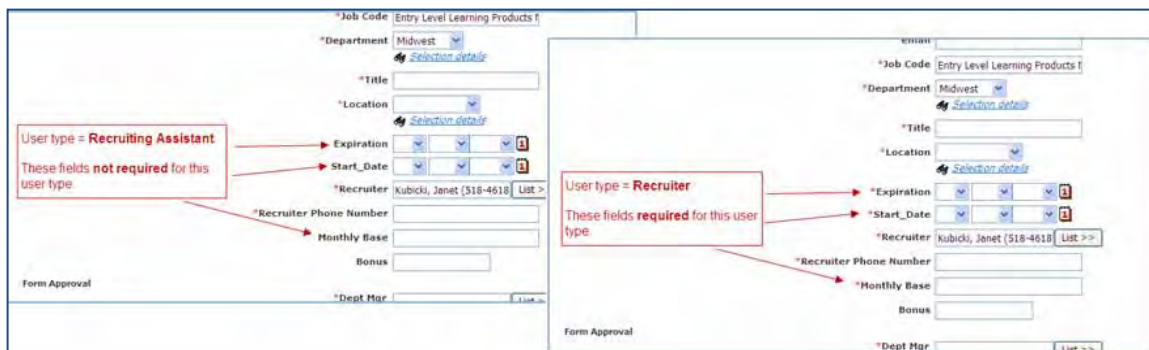

"Required by user type" functionality is supported on candidate forms via 2xB and eLinks. For eLinks, if the recipient is a non-system user, the field is required if **QuickStart** user is selected in the **Required for these user types** field attribute setting.

This functionality does not extend to candidate forms displayed out on the Talent Gateway (Document subsidiary forms on the candidate portal, Agency Manager, Employee referral, etc.). TGs currently consider locale rather than user type for field privileges, so those forms still need to have fields required by language to work effectively out on the TGs.

Uneditable by User Type

Organizations can now (as of Release 13 Build 2) configure that specific candidate form fields are *not editable* for a particular user types. If the user completing the form is of a user type selected in this candidate form field attribute setting, the user will not be able to edit the field, but will be able to see the data as static text.

eLinked Form with Requisition ID and Job Title Non-editable for eLink Rrecipient
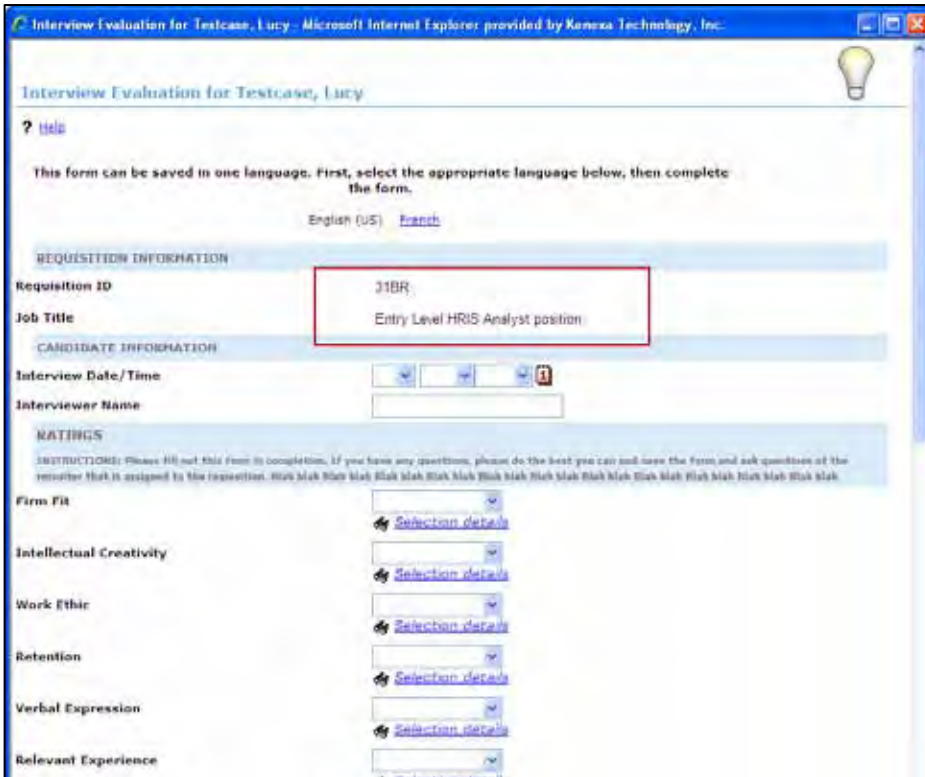
This functionality does not extend to candidate forms displayed out on the Talent Gateway (Document subsidiary forms on the candidate portal, Agency Manager, Employee referral, etc.). TGs currently consider locale rather than user type for field privileges, so those forms still need to have fields required by language to work effectively out on the TGs.

Field Help Text

Your organization can provide field-level help text when adding or editing candidate forms and document subsidiary forms. The help text can describe the field's purpose, expected data and format requirements, surrounding process, or even provide a link to additional information. Help text is the same for all user types , but is translatable for different locales.

2xB users or eLink recipients click a blue help "i" icon ( ) to access the information (rather that hovering to view Tool Tip-like help). This allows longer content. HTML formatting is also supported, so content can include font features such as bold and italics, bullets and numbering, and links.

The field help text icon 🛈 appears:

- Between the field label and field input/selection area (when these are beside each other), or beside the field label and above the field input/selection area when these are stacked
- For multi-line labels, aligned with the first line of the label (except for TG and GQs, if a label is multiple lines, the icon appears at the end of the text of the label)
- Only if the field has a value in the **Field help text** for the current locale for which the form is open
- For forms accessed from 2xB, elinks, and out on Gateway Questionnaires. In 1Q 2012, Talent Gateways will suppor field help text as well, including Default questions on TGs and Basic TGs, Job-specific questions, and Agency Manager questions.

The field help text box is:

- Sized to content, with text appearing in browser-specific format (following background color, font, font size, etc)
- Positioned just above the field input/selection area, and repositioned by dragging to desired place on the screen
- Closed only when the user clicks the 'X' in the upper right corner to close it, or user clicks another help text icon, or the formitself is submitted, closed, canceled, or closed via browser.

Support for Talent Gateways, Agency Manager, and Employee Referral Gateways will be available in Release 13.0 Build 2. The display rules for default and job-specific questions, forms and document subsidiary forms attached to gateways, are the same as listed above.

Talent Gateway – Default & Job specific questions
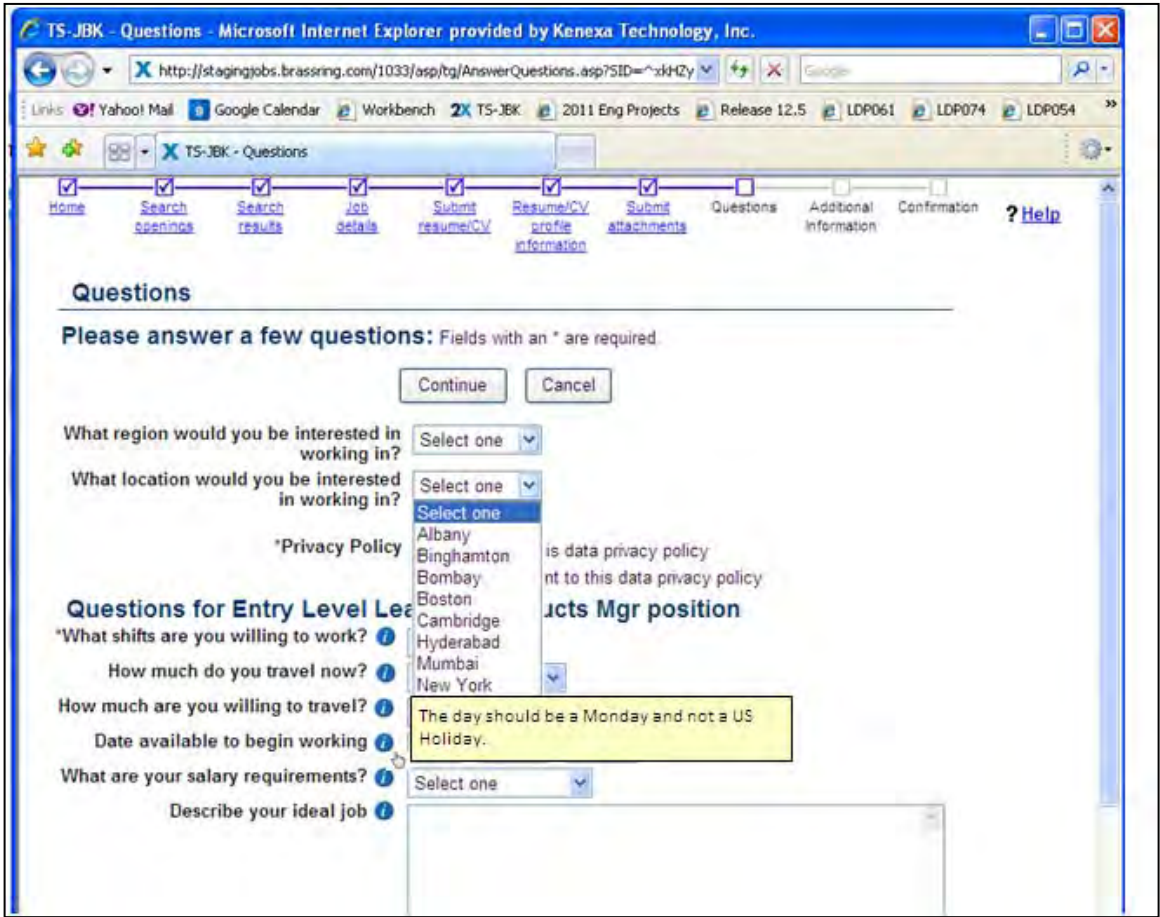
Agency Manager –Agency questions
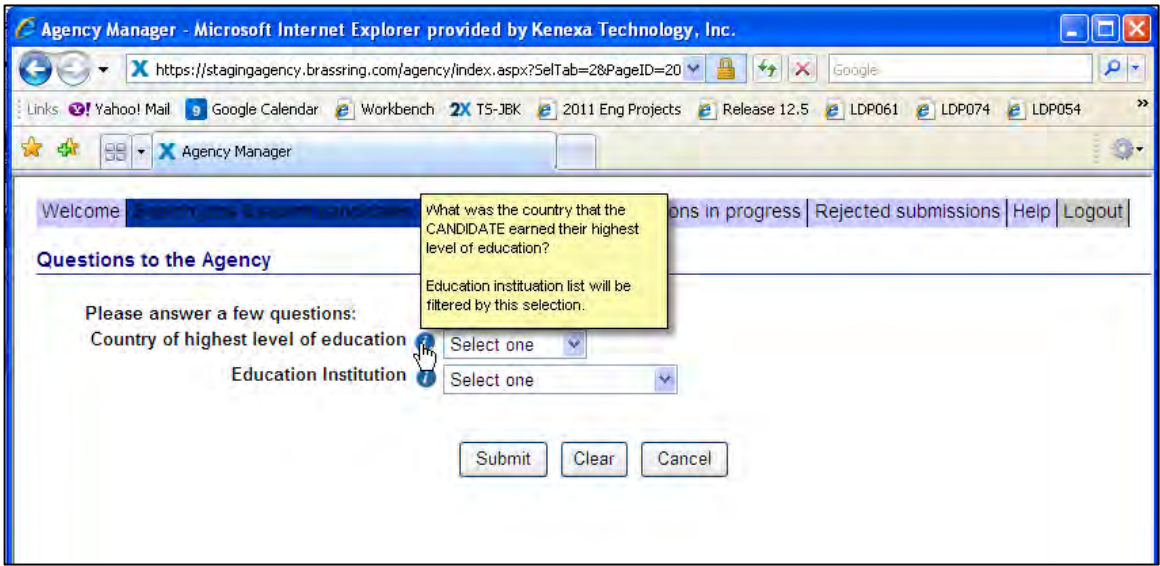
Talent Gateway – Document subsidiary form

Dear Lucy Testcase,

We are pleased to offer you the position of Account Manager in the Boston department at the location of Boston, Massachusetts .

We'd like you to start on April 19, 2010 at the annualized salary of 73,000.

Please complete the attached form to inform us of your decision in regards to this offer. We will be notified immediately when you click 'Save'.

We look forward to your positive response and hope that you decide to join our team.

Kindest regards,

Janet Kubicki
555-1212

[ec1a3be1-f751-477d-bc28-9a73e5da2aaf]

? Help

Powered by Kenexa' **eLink**

Professional Offer - Response - Testcase, Lucy

First name Lucy

Last name Testcase

*Offer Response ○ Accept
○ Decline

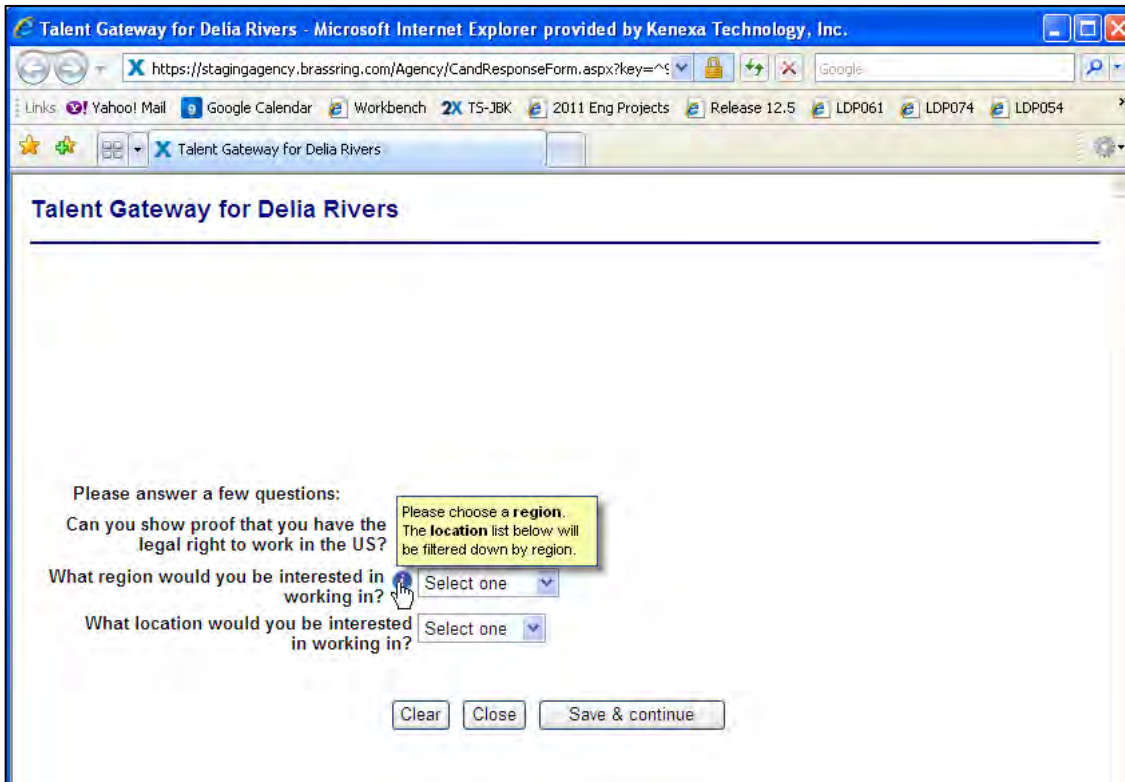**If you Decline, please indicate reason:** Select one

Document ID {EC1A3BE1-F751-477D-BC28-9A73E5DA2AAF}

*By checking this box, I acknowledge that I have ⓘ ☐ I have read, reviewed, and understand the
reviewed and agreed to the Privacy Policy and Privacy Policy and Terms and Conditions
Terms and Conditions.

Save   Clear   Close

Agency Manager – Candidate questions

Question Branching

Question branching can enhance the user experience by shortening the form to show and require only those fields that the user needs to complete. Questions dependent on a particular response can appear only when the relevant response has been given.. For example, for an offer form, fields that pertain to relocation may appear and perhaps be required for completion only if the answer to the Relocation question is "New Hire."

Whether a question is shown depends on only *one* other field on the form. However, several options for that one field can cause the branched "child"' field to be shown. For example, if the options for Relocation are College Grad, International, New Hire, and No, all of the child questions could be configured to show if the Relocation "parent"' question is answered as any of those four other options except No (i.e., College Grad, International, or New Hire would all trigger an additional question or questions).

A question branch "child" can also be a question branch parent to another (or many) fields. For instance, suppose Relocation is the parent and "Does the candidate own a home" is a child question that only appears when the parent's answer is International. "Does the candidate own a home" with an answer of Yes could be a parent question and response to several other questions. And so on and so on….

Question branching is supported for candidate forms in 2xB in add, edit, view pages, and for eLinked forms in add, edit, view and approve pages. Talent Gateways will support question branching as of Release 13.0 build 2.

Form Image Upload

Your organization can now brand candidate forms with company or division logos and other images. The images appear on forms viewed in 2xB as well as in the eLinked.

You can now choose, by form, if that form should have:

- No image (the default)
- Client image (already used for the 2xB account and eLinked forms, but now available when viewing the form within 2xB as well)
- Form-specific image.

You organization also choosees the image alignment, applicable when accessing the form through 2xB (eLinked forms will continue to have the configured image in the upper right of the form). In 2xB, the image appears at the top of the form, above any language toggles and to the left of the Help hyperlink, aligned at:

- Left
- Center
- Right

The following figure shows the client image in 2xB, the form image left-aligned when the form is accessed through 2xB, and the form image on an eLinked form.
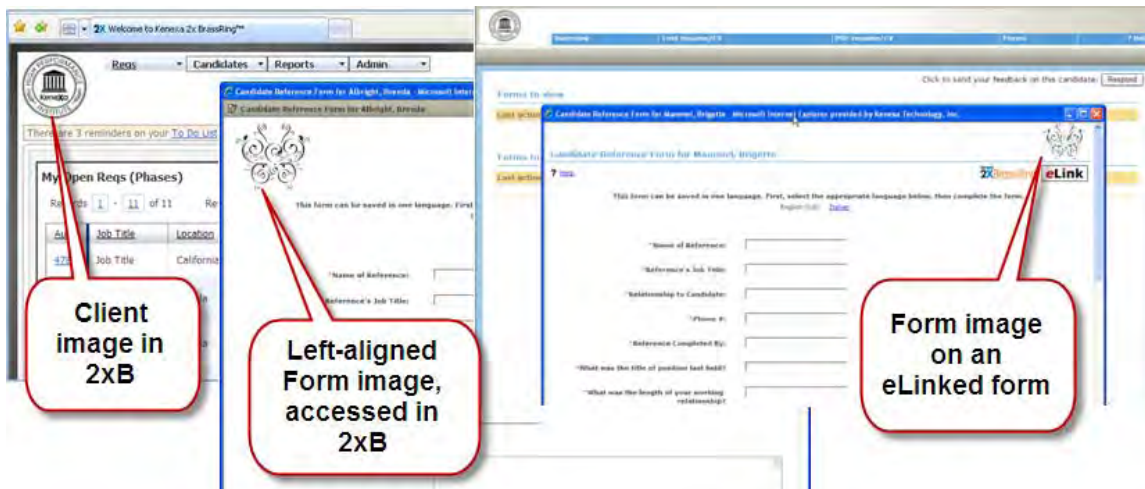

Form-level images are not supported for attached candidate forms on Talent Gateways or Basic Talent Gateways, Agency Manager, or for Document subsidiary forms, to avoid clashing with Talent Gateway branding.

Form Layout

The enhanced form layout allows forms to be shorter and more visually appealing as an electronic form, as well as easier for users to view and complete. Key features of the new layout include:

- Sections that allow design flexibility
- Columns: one, two, or three in each section
- Alignment of fields within a section at left, center, or left- aligned with options centered
- Horizontal or vertical options for radio button and check box fields
- Labels configured above or to the left of field input
- Vertical (up and down columns) or horizontal (across columns) tab direction (in the figure below, vertical tabbing would be Date of phone screen -> Phone screen type -> Screened by -> Recruiter; horizontal would be Date of phone screen -> Screened by -> Phone screen type -> Recruiter)
- Bullets preceding fields
- Indented and outdented fields
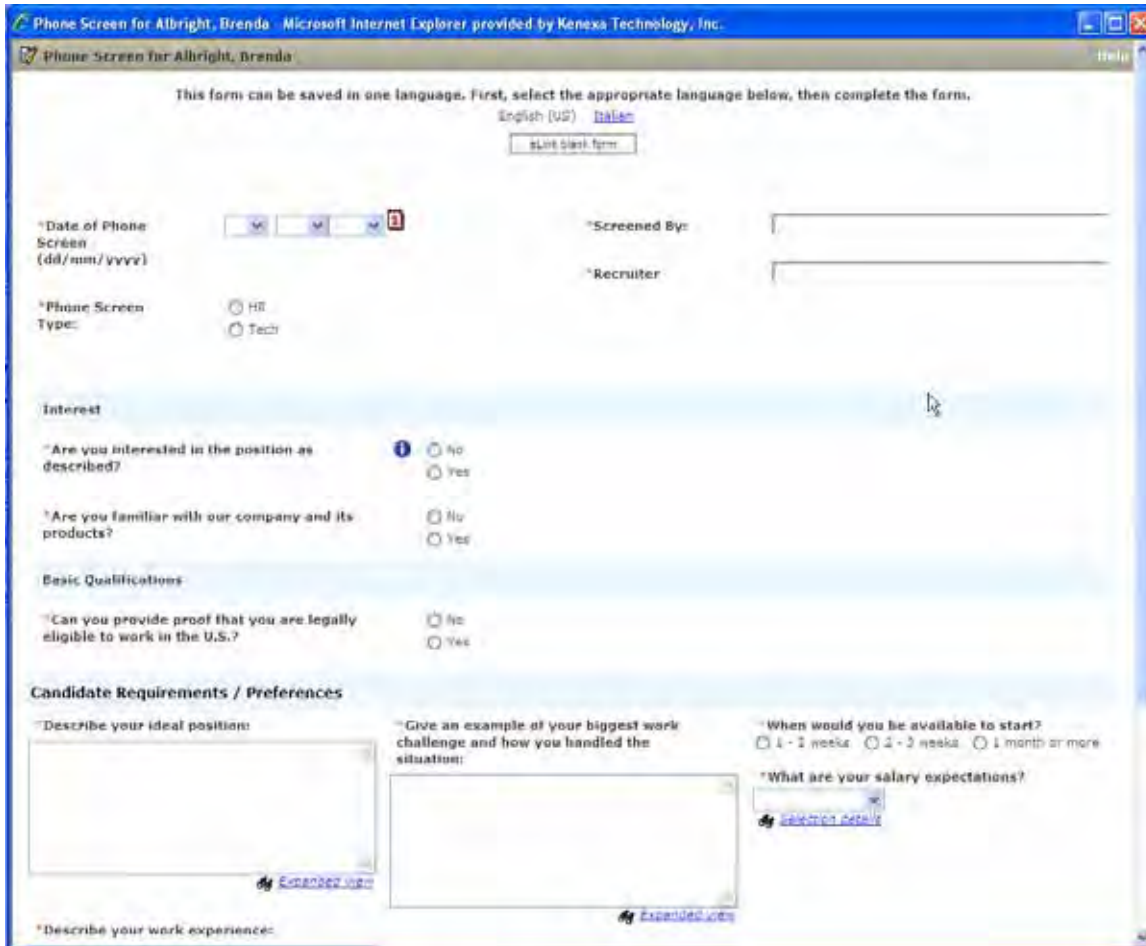
Once activated for a form, Enhanced layout will appear when users add, edit, approve, or view a form in 2xB or via eLink.

How Do Clients Get this Feature?

These enhancements are controlled by new form and field attributes in Workbench Self Service. Please contact your Kenexa Support Team for more information about enabling this feature.

Workbench Self-Service Certified Users

Editing Field Attributes (for Field Help Text, Non-editable by User Type, Required by User Type, Question Branching)

Tools > Forms > Candidate forms > Administer form fields [for selected form] > **Edit field attributes** [for selected field]
Tools > Forms > Document subsidiary forms > Administer form fields [for selected form] > **Edit field**

attributes [for selected field]

Field Help Text

Supported for Candidate Forms and Document Subsidiary Forms in 2xB, eLinks, and Gateway Questionnaires. Support for Talent Gateways and Agency Manager will be available in Release 13.0 build 2.. Field help text is available for all field types, including label fields.

To add the text for form fields:

1. Navigate to the **Edit field attributes** page for the desired candidate form field or document subsidiary form field .

2. For **Field help text**, enter up to 4000 characters to be displayed for base locale users when they click the resulting help icon for the field. You can use HTML for links and formatting (bold, italics, bullets, numbering, etc).

Gateway Questionnaire form fields and widgets inherit the field help text and translations from their source fields.

To add additional translations for your supported locales:

1. On the Edit field attributes screen, click the plus sign (+) for Field help text for a *single* field at a time. –OR–
On the **Administer form fields** page for a selected form, select **Translate field help text** to provide translations for *all* the form's field help at a time.
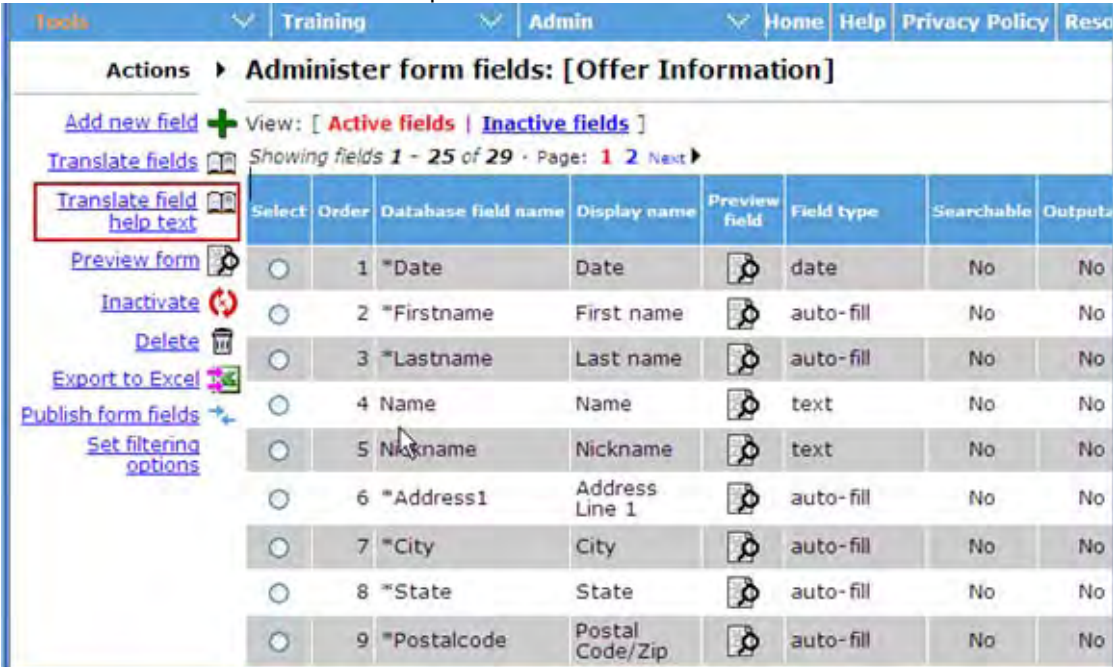
This is available for all field types: Autofill, Checkbox, Date, Grid, Email address, Label, Multi-select, Numeric, Radio button, Single Select, SSN, Text, Text area.
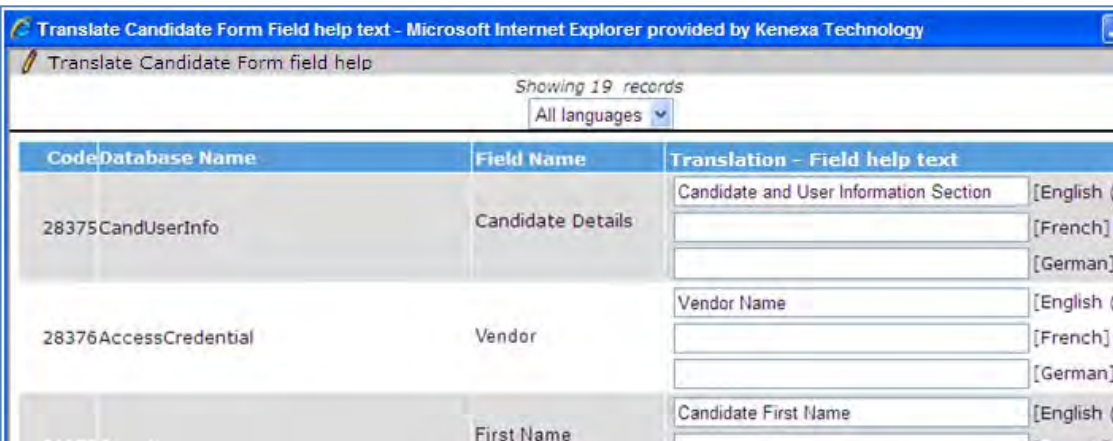
2. The Translate Candidate Form field help screen shows all languages of all purchased recruiter and TG locales. Enter the translations, up to 4000 characters. You can select a particular language for which to provide translations from the drop-down at the top, if desired

Non-editable for These User Types

Supported for Candidate Forms and Document Subsidiary Forms in 2xB and eLinks as of Release 13.0 build 2..

1. Navigate to the **Edit field attributes** page for the desired candidate form field or document subsidiary form field.

2. In the **Non-editable for these user types** field, select user types who, when completing the form, can not edit the field. The same user type cannot be selected in **Hide for these user types** or in **Non-editable for these user types**.
3. Click **Save**.

Fields must be one of these types: Autofill, Checkbox, Date, Email address, Multi-select, Numeric, Radio button, Single Select, SSN, Text, Text area (cannot be Label).

Import/Export file

The field attribute of **Non-editable for these usertype** will be accepted/included as a column for import and export file (for example, via **Tools > Forms > Candidate forms >Administer form fields >Export to Excel**).

Required for These User Types

Supported for Candidate Forms and Document Subsidiary Forms in 2xB and eLinks.

1. Navigate to the **Edit field attributes** page for the desired candidate form field or document subsidiary form field.

2. In the **Required for these user types** field, select user types who, when completing the form, must provide a value for the field in order to save the form. The same user type cannot be selected in **Hide for these user types** or in **Non-editable for these user types**.
3. Click **Save**.

Fields must be one of these types: Autofill, Checkbox, Date, Grid, Email address, Multi-select, Numeric, Radio button, Single Select, Text, Text area (cannot be Label).

Import/Export file

The field attribute of **Required for these user types** is accepted/included as a column for import and export file (for example, via **Tools > Forms > Candidate forms >Administer form fields >Export to Excel**).

	AC	AD	AE	AF	AG	AH	AI	AJ
1	Order of Years	Mask field Input	Enable confirmatio	Confirmation field prefix label	Reference field o	Hide for usertypes	Required for usertypes	
2	Ascending	No	No			HR Executive, HR Staff, Hiring Mana	FedCon Recruiter, NewU	
3	Ascending	No	No			HR Executive, HR Staff, Hiring Mana	FedCon Recruiter, NewU	
4	Ascending	No	No				FedCon Recruiter, NewU	
5	Ascending	No	No				FedCon Recruiter, NewU	
6	Ascending	No	No				FedCon Recruiter, NewU	
7	Ascending	No	No				FedCon Recruiter, NewU	
8	Ascending	No	No				FedCon Recruiter, NewU	
9	Ascending	No	No				FedCon Recruiter, NewU	
10	Ascending	No	No				FedCon Recruiter, NewU	
11	Ascending	No	No					
12	Ascending	No	No					
13	Ascending	No	No					
14	Ascending	No	No					
15	Ascending	No	No					
16	Ascending	No	No					

Question Branching

Supported for Candidate Forms in 2xB (add, edit, view pages) and for eLink candidate forms (in add, edit, view and approve pages). Will be supported for TG and Basic TGs 1Q 2012, including Job-specific questions, attached forms, document subsidiary forms on the Candidate portal, Agency Manager (contact questions, candidate questions, candidate attached forms), and Employee Referral gateways (referring employee non-GQ questions, candidate questions, candidate attached forms).

1. Navigate to the **Edit field attributes** page for the desired candidate form field, the "child" field you want shown based upon a response to another ("parent") field. You don't need to configure the parent. Any field type can be a child for question branching.

Question Branching:	⊙ Yes ○ No
	Show question when field response is:
	Database field name: [Select]
	Selected value(s): [Select]

2. For the Question Branching field, select **Yes**. This enables the Select button for the "Show question when field response is:" field.

3. Click **Select**. The Search for Fields screen appears.
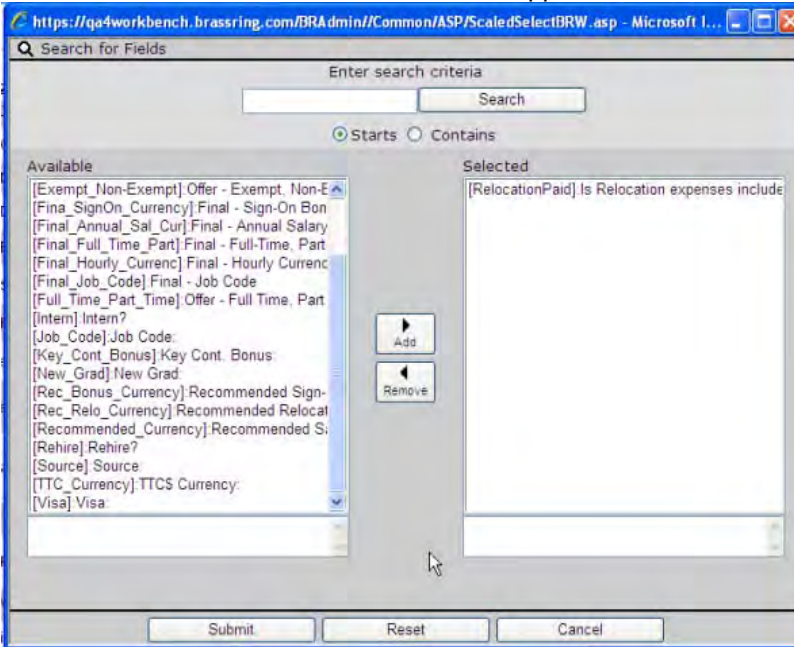
4. Search for the parent field whose response will determine whether the child/branched field should be shown. you wish to have show the field, select it and click **Submit**. This returns you to the Edit field attributes screen with the second Select button enabled.
5. To choose one or more response/option values that when given on the form will show the child question, click the second Select button.
    On the Search for Options screen, select one or more options. You can choose multiple options even for single- select fields (if any one of them are selected, the question will show) If it is a multi select field, if *any* of the options selected here are selected on the form, the question will show.
    Click **Submit**. This returns you to the Edit field attributes screen with your selections shown (to view more than 10 selected option values if you have them, click the View all values hyperlink that will be present).
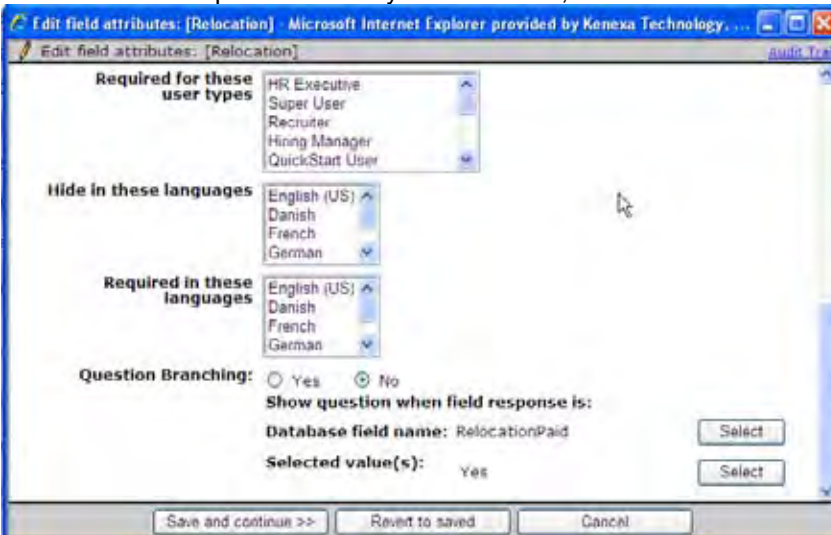
When a field's attribute **Question Branching = Yes**, the branched/child field will *not* be shown on the form until your parent field:
•   has a configured option value selected by the user or via Autofill, Field association, or Form import.

- is showing (not hidden by user type, language, or question branching) and not filtered out (by Option list filtering or Field Association filtering).

Question branching can *only* be within the same form, and questions can*not* be 'branched' on HR Status.

"Show question when" field types that you select from include the current form's active, option-able fields:
- Single select, Multi-select, Check box, Radio button
- Autofill – with source fields that are of type single select, multi-select, check box, radio button
- Maintain custom option list
  –OR–

  Pull options from list of:

  - Specific codes

  - States

  - Countries

  - Options from other form field

    - STANDARDREQ – Division/Location

    - STANDARDREQ – Department

    - Any other option-able custom requisition

    - Any option-able candidate form fields

Excluded fields are those that options from list of:

- All Recruiters
- All Managers
- All Active Enterprise users
- All Active users
- All Reqs
- All Open reqs

Field attributes with no impact for show question selection:

- Hide for these user types
- Hide for these languages
- Required for these user types
- Required for these languages
- Non-editable for these user types
- Encrypted = Yes

If a parent field is configured for both question branching and field association:

- Users will see a "Please wait" message.
- Field association and Question branching are independent functionalities. A Question branching 'parent' can be a Field association 'parent' or 'child' field (and the reverse).

Non-editable fields (feature coming in R13 Build 2) *can* be parent fields.

- If the configured option is selected in the non-editable field to show the child field, the child field will be shown upon Add page load.
- If the configured option is NOT selected in the non-editable field to show the child field, the child field will never be shown to that user.
- When a non-editable field is a Question Branching child, it displays a value only if a value is defaulted by Field Association

Form Image Branding

To upload a form-specific image:

1. Navigate to **Tools > Forms > Candidate Forms > Edit form attributes** [for selected form].

2. Select an option to use as the image on the form, either the Client image or a different, form-specific Form image. No form image ("None") is the default. (The Client image used for 2xB and/or eLinks is controlled via a client setting, so does not need to be configured here).

3. If you select Form image, click **Configure image**. The Configure Form Image screen appears.
Browse to the image to be uploaded: .gif, .jpg, .jpeg, or .bmp file no larger than 1.5MB with image size maximum of 130 x 130 pixels.
Click **Upload** and preview. You can remove an uploaded image by clicking **Remove Image,** and reload another if desired.
Click **Done** when satisfied with the uploaded image.

4. Select the desired alignment, applicable when accessing the form through 2xB (eLinked forms will continue to have the configured image in the upper right of the form). In 2xB, the image appears at the top of the form, above any language toggles and to the *left* of the Help hyperlink, aligned at your choice of Left, Center, or Right.

5. Click **Save**.

To see how the uploaded image looks on the form, click **Preview form** for the desired form.

For eLinks, if this attribute is set to "None," the Client image (with client setting DisplayeLinkLogo=Both) still appears in the upper right of the eLinked form. If set to "Form image," the uploaded Form image displays in eLinked forms (only) in location where client image typically appea (upper right).

When forms are eLinked through the "eLink Talent Record" functionality to complete or view, the client image *will continue* to be displayed on the *left* side of the eLinked Talent Record. This form attribute setting does not affect the image on the eLinked Talent Record since different forms with different images can be included with an eLinked Talent Record. However, the Form images appear once individual forms are launched.
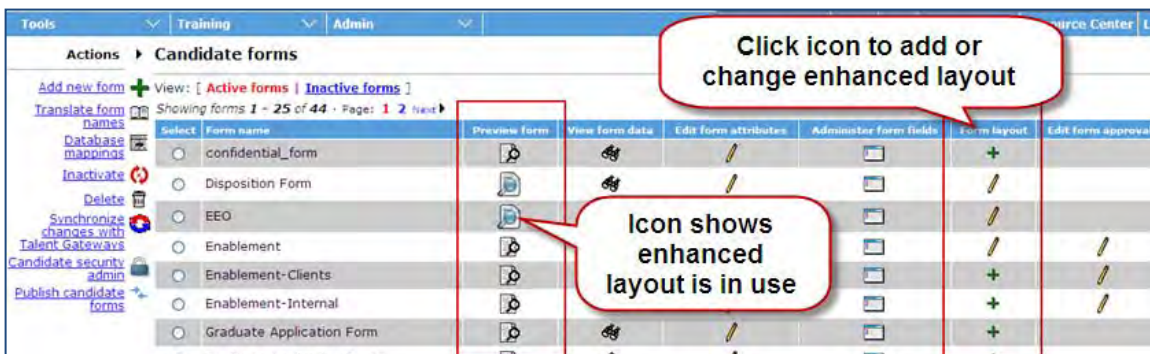
Form Layout

The candidate forms list in Workbench (**Tools > Forms > Candidate Forms**) has a new icon and column for enhanced form layout.

A new **Preview form** column icon ( ) shows when a form is currently using an enhanced layout.

The new **Forms layout** column:

- A plus sign (+) indicates an enhanced layout does not yet exist – click to add one.
- A pencil icon indicates an enhanced layout has been saved – click to edit it.

You can create and save an enhanced layout in stages before making it visible to end users via a new form attribute called **Form layout (Tools > Forms > Candidate Forms > Edit form attributes** [for selected form]).
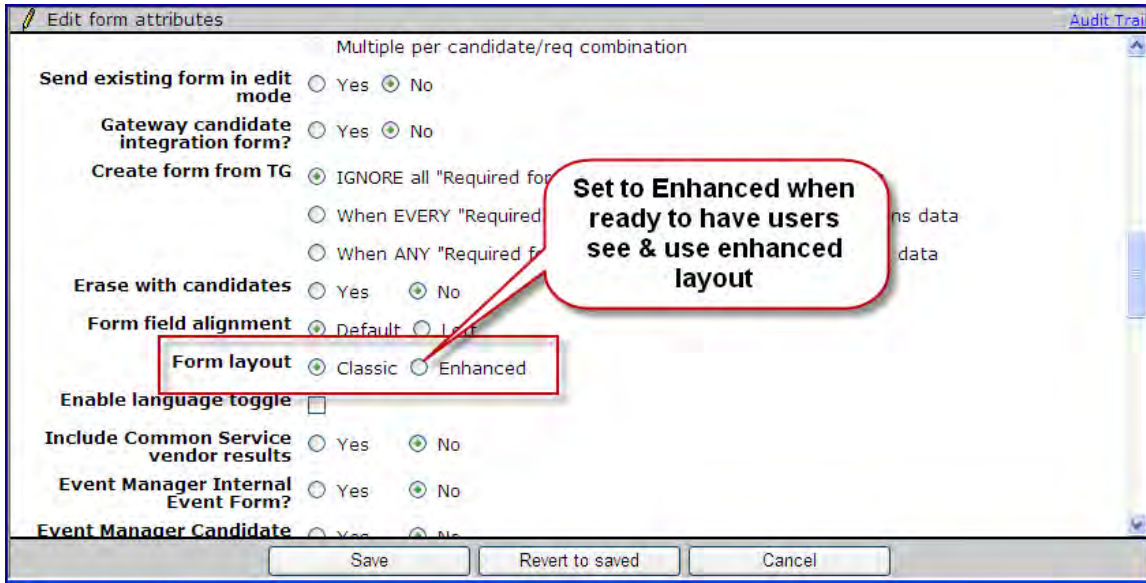
The Form layout attribute defaults to **Classic**. After making your changes to enhance a layout, select **Enhanced** when you are ready to have users see and use it. This setting is disabled if an enhanced layout is not yet saved for the form.

You still use Administer form fields to administer fields, such as re-defining field types, making fields required or not, hidden or not, setting up question branching, options, translations, etc. All field *functionality* is still administered in this area. Make sure the desired fields are present and in the generally-desired order before going on to create the enhanced layout.

Creating the Enhanced Layout

1. Click the Add or Edit Form layout icon in **Tools > Forms > Candidate Forms** for the desired form. The form layout screen opens.
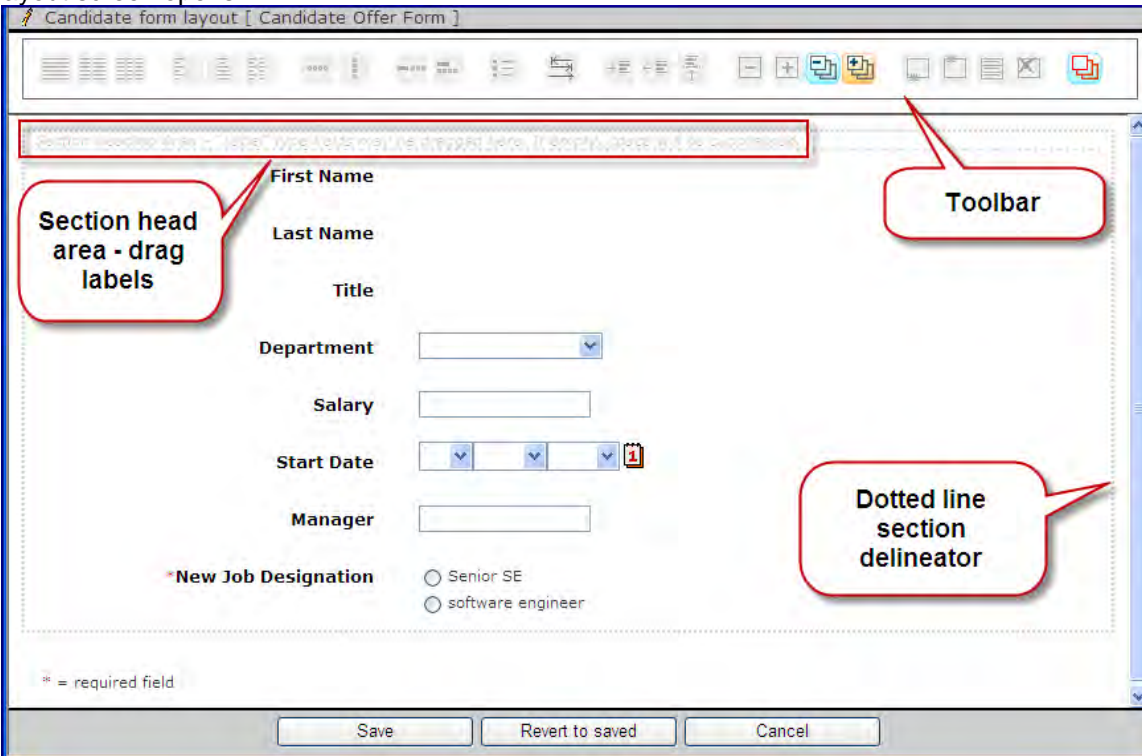
- The form displays with all fields in one section, nothing selected, toolbar and section heading grey. Fields are initially in the same order as the Placement order from the field attributes. (When you move fields around on the enhanced layout, the field attribute placement order will thereafter be ignored, and not adjusted or updated.) The initial field alignment respects the form "Form field alignment" attribute: for Default the fields align center, for Left the fields align left with options centered.

- The grey dotted line around a section when it's not highlighted delineates it in the layout manager tool. You'll also see a Section header with the text "Section heading Area – "Label type fields may be dragged here. If empty, space will be suppressed." End users of the finished form don't see these layout editing aids.

2. Click in a section to select and drag fields to reposition them, and to apply formatting in the section. Sections are for categorizing fields, primarily for arranging them as a group in columns. Most formatting icons apply to all the fields in a section, to make alignment, bulleting, and field label position more efficient and consistent. Only empty sections (containing no fields) can be deleted or removed.
All sections have a Section heading area. Formatting such as bullets and alignment do not apply to the Section heading area, and only LABEL type fields can be dragged there.

- When you click on a field or anywhere in the white space of a section, the section (or field) will become highlighted and selected. Selected sections are outlined in red and the section heading text is in red.

3. Use the toolbar to apply your formatting to the selected items. To move multiple fields, you can select them, even from different sections, using Ctrl-left-click (or Shift-left-click for all fields between two fields). Then drag to their new position and drop them.

Each set of layout options in the toolbar is described below. Each set also uses color as an indicator, as shown here for columns:

Grey ▤ indicates no section is selected. Yellow ▦ indicates the option in force. Blue ▦ indicates the options in the set that you can apply to the selection.

Columns

Choose the option bearing the desired number of columns, then drag the fields into place as desired. When you apply the column choice, notice the Section heading area continues across all the columns. It's still a part of the section, but a heading area. Only label fields can be dragged into this area – usethe dotted horizontal line as a target for dragging/dropping.	One	
	Two	
	Three	

Alignment

Section Heading Area will always be Aligned left, regardless of the toolbar button setting for the rest	Align left	
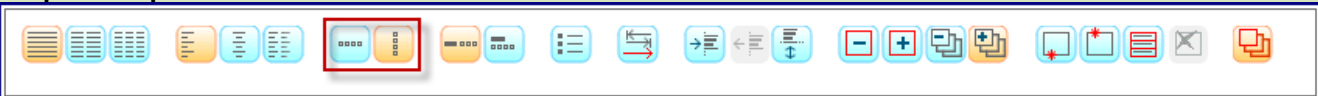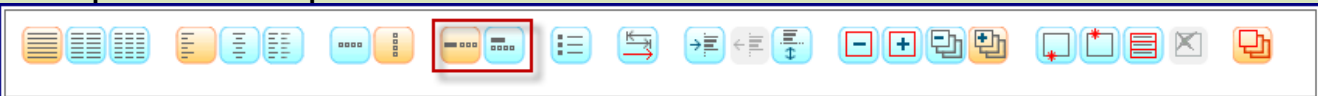
of the section	Center	
	Align left with options center	
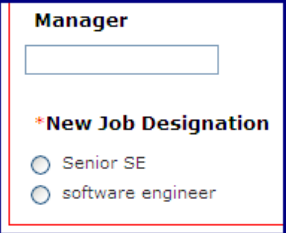
Response Option Orientation
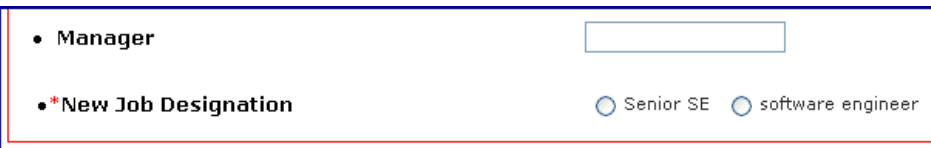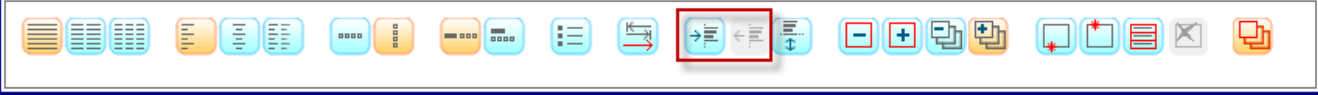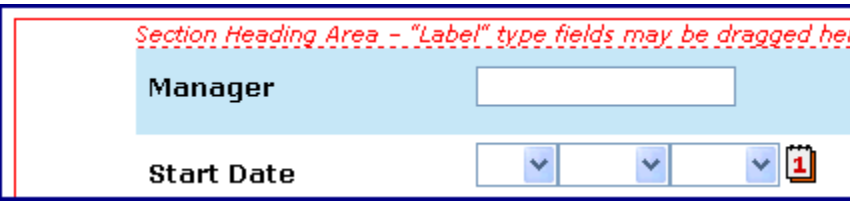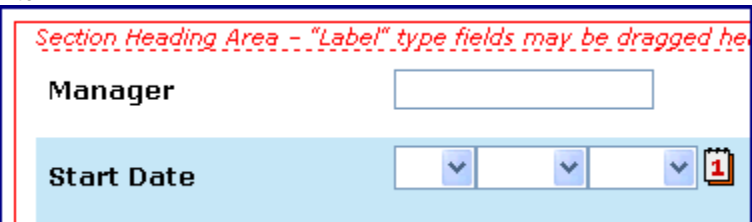
This control affects radio button and check box field options, and the default is vertical.	Horizontal	
	Vertical	

Label/Option Relationship

Positions the field label in relation to the options/field entry. Default is Labels to the Left.	Labels to the Left	
	Labels Above	
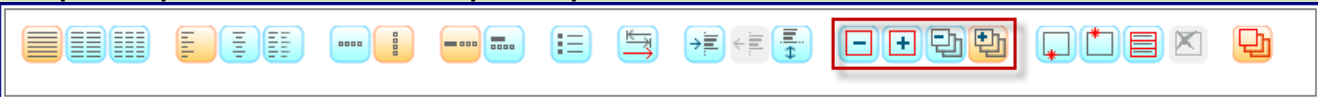
Bullets

Puts bullets in front of the fields	Bullets	

Tab Direction

Tab moves to fields *left to right across columns,* from top to bottom	Horizontal first	
Tab key moves to fields *top to bottom within a column*, then from left to right through cols	Vertical first	

Indent / Undent

These controls indent/undent in the selected direction. Once indented, Indent button is yellow (and still actionable) and Undent becomes blue (and actionalble). Section heading respects Indent	Indent If yellow, has been indented	**After**
	Undent Only blue if field is already indented	**After**

Toggle Bottom Margin

		Before
Controls space between sections, no margin (grey) by default. Multiple sections look more continuous section with no margin	Click to Add margin	**Before**
	Click to Remove Margin	**Before**

Collapse / Expand Sections and Collapse / Expand All Sections

For convenience while editing layout, collapses selected section or all sections to 1 row, or expands selected/all sections to show all fields in the section. You can drag fields into a collapsed section.	Collapse Collapse All (Yellow when all collapsed)	**Before**
	Expand Expand All (Yellow when all expanded)	**Before**

Candidate Forms - Redesign | 23

Add Empty Section Below / Above

| Adds a new, empty section with characteristics and formatting of current section (lignment, bullets, field label position etc.). Both sections will be highlighted. | Add Below | **After** |
| | Add Above | **After** |

Split Sections at Headings

| At each LABEL field type in a single-column section, creates a new section with all the successive fields *up to the next LABEL field type* included in the new section. | Split current section at field types = Label Button is only available if your currently highlighted section is *in one column*. | Recommended when initially enhancing layout if you utilize Label fields to section your forms. System creates a new section at each Label, putting each label field and all the fields below it, up to the next label field, into it's own section. System also puts the labels into the section heading area. Multiple adjacent labels are kept in the same section. |

Remove Empty Sections		
Remove a section if it is empty of fields	Remove Empty	**Before**
Select All Sections		
Selects all sections in form	Select All	**After**

4. To save the enhanced layout when finished, click **Save**. If it was the first time enhancing the layout, the Add icon in the Form layout column becomes a Edit icon.
5. Set the **Form layout** attribute to Enhanced (**Form layout (Tools > Forms > Candidate Forms > Edit form attributes** [for selected form]) when ready to have users see and use it.

Additional Layout Considerations

- A newly created field and/or activated field that has not appeared in the enhanced layout previously will appear as the **last field** in the **last column** of the **last section**.
- The Form approval section is a system controlled section. The elements contained within this section are configured elsewhere in form configuration, and the section label **Form approval** cannot be highlighted or moved. All 'field' sections will be above the Form approval section label. Any approval levels configured for the form will be displayed in the Form approval section. These levels (names, configuration, or order) cannot be configured in the enhanced layout manager. When the form is launched in view mode by an end user, the current form approval table will be shown as per current functionality.

Enhanced Layout for Talent Gateway Forms

As of Release 13.0 Build 2, Enhanced layout functionality is also available for Talent Gateway attached forms, Basic Talent Gateway attached forms, JSQ widgets on GQs, Agency Manager attached forms, Referral Gateway attached forms, and Event Manager.

Fields not displayed in an "enhanced" layout:

- Fields selected from the Talent Gateway form for Default or Job-Specific questions in an "enhanced" layout when a candidate is applying
- Agency Mnager Agency contact questions and candidate questions
- Employee Referral Referred employee questions (non-gq flow)

These fields appear in classis layout, center or left-aligned as configured on the Talent Gateway.

Attached forms *will* be displayed as per the **Form layout** form attribute. For an enhanced layout, the fields will align as they are configured in the section(s) and will ignore the Talent Gateway setting for field alignment.

TG Attached form: First form is 'Enhanced' layout, second form (starting at "ELECTRONIC SIGNATURE") is 'Classic' layout.

Kenexa Tasks

Form Level Branding

The form attribute setting is **not** importable or exportable via Workbench form import/export.

Interaction with DisplayElinkLogo client setting:

If a form is eLinked directly, the **DisplayElinkLogo** client setting controls what shows on the upper right corner of the form.

If a form is eLinked to Complete or View via an eLinked Talent Record, the client image shows on the left side of the eLinked Talent Record. The **DisplayElinkLogo** client setting controls what shows on the form(s) after they are launched from the eLinked Talent Record.

DisplayElinkLogo client setting has the following options: None (Default), ELink, 2xB, Both

- **None** = **Client image only** shows on the eLinked form
- **2xB** = **Client image** & **2xBrassring image** shows on the eLinked form
- **eLink** = **Client image** & **eLink image** shows on the eLinked form
- **Both** = **Client image** & **2xBrassring image** & eLink image shows on the eLinked form

Note: even when the client setting is set to 'None', the eLinked forms have the client image.

The form level **Forms Image** attribute controls branding on forms added/edited/viewed in 2xB as well as via eLink. The setting may override the client image on the eLinked form. It has the following options: None (Default), Client image, Form image

- **None:** No change to existing functionality (the client image is displaying regardless of the client setting)
- **Client image:** No change to eLink functionality; Forms added/edited/viewed in 2xB will display uploaded client image (in Client basics)
- **Form image:** Form image will be displayed in eLinked forms (only) in location where client image typically is; Forms added/edited/viewed in 2xB will display uploaded form image
- uploaded Form image will be in place of the Client image IN FORMS ONLY

Note: If a form is eLinked to Complete or View via an eLinked Talent Record, the client image *will continue* to be displayed on the left side of the eLinked Talent Record. This form level setting can not affect the image on the eLinked Talent Record since different forms with different images can be included with an eLinked Talent Record.

Candidate Forms – Viewing Privilege for Req Team

A new form-level privilege controls what user types have access to view a per-req candidate form if they have a "my req" relationship to the candidate through the associated req. This allows members of a req team to view forms for candidates without having the "view all" privilege.

Product **RDP536 Rel 13.0**	þ 2x BrassRing þ New UI	þ Workbench Self-Service
Visible Changes	þ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	þ Configuration required – see details below.	

Feature Description

Candidate form-level privileges control user types who can view an existing form:

- Form creator, through existing "**Add/view/modify my**" access
- User types with existing "**View all**" access
- User types with existing "**Modify – my reqs**" privilges
- User types with a "my req" relationship to the candidate through the associated req, with ****NEW**** "**View – my reqs**" access.

The new access privilege applies to single per candidate/req and multiple per candidate/req forms.

Users with a "my req" relationship to the candidate through the associated req include the req creator, recruiter, hiring manager, and users selected as members of the req team. This relationship-based access allows members of a req team to have access to view forms for candidates for which they have the required relationship, without having the unrestricted "view all" access to forms.

2xB User Experience

Users types with **View – my reqs**" access can view or eLink single per candidate/req and multiple per candidate/req forms for which they have a "my req" relationship to the candidate through the associated req.

Users types with *only* **View – my reqs** access do not see the eLink icon, binoculars icon, active form hyperlink, or View and eLink options on the right-click "shortcut" menu for any per-req form for which they do not have a "my" relationship.

> "View all" and "Add/View/Modify my" access applies exactly as today, governing what actions are allowed or prevented, including, but not limited to:
>
> - Seeing the form in the Talent Record forms table
> - Accessing the Edit form icon (🖉)
> - Accessing the Delete form icon (🗑)
>
> For example, a user with "View all" access to a form but no "my" relationship sees the View form binoculars icon or hyperlink, as does a user who is the form creator and has "Add/View/Modify my" access.

You can view forms from multiple points in 2xB:

- View form icon in Forms tab in classic Talent Record
- *A*ny candidate grid w/ Forms column (e.g., req folder) | by clicking the Forms icon to open the Form table in new window.
- Form link or right-click View form "shortcut" menu item in new Talent Record's Action Log (filtered by or showing form-added row)

You can also eLink forms from several points in 2xB:

- eLink form icon in Forms tab in classic Talent Record
- eLink form icon in Forms column for a candidate in a classic candidate grid
- eLink form icon in Forms column for a candidate in New UI Candidate Results panel
- Right-click eLink "shortcut" menu item in new Talent Record's Action Log (filtered by or showing form-added row)
- eLink form icon in Forms column for a candidate in a New UI custom subpanel

The following figure shows what's visible if you have this access:

- "My req" relationship with 9BR, but NOT with 21BR
- **View all** access to "Interview Evaluation" and "Phone screen" forms
- **View – my reqs** access to "Offer form"

Talent Record: Forms tab

The following figure shows what's visible in the new Talent Record if you have this access:

- "My req" relationship with 47BR, but NOT with 33BR
- **View all** access to "Interview Evaluation" and "Phone screen" forms
- **View – my reqs** access to "Offer Information" form

New Talent Record Action Log filtered by Form

With the "my req" relationship to 47BR, you can view or eLink the form using the right-click shortcut menu, as shown in the following figure.

New Talent Record Action Log filtered by Form – Shortcut Menu for "Offer Information" with "my req" Relationship

But without a "my req" relationship to 33BR, you can neither view nor eLink via the menu, as shown in the following figure.

eLink Form

The **eLink** icon or right-click action sends the form to the designated recipients. When selecting recipients, you can select to send the forms to edit, view or approve. If you send an eLink to a system user, the eLink checks the user type of the recipient. The system displays the form (and appropriate data) or an error message, based upon the form privileges and the recipient's user type. If If you send an eLink to a non-system user, the system displays the form (and appropriate data) or an error message, based upon form privileges given to a 'Quickstart' user.

Non-system users (Quickstart user): An eLink recipient with only "View – my reqs" access, sees the error message "You don't have privileges for viewing this form". This is because a QuickStart user cannot have a 'my reqs' relationship with a form.

System user: An eLink recipient with only "View – my reqs" access must have a "my req" relationship with the candidate OR have the "View all" privilege to be able to view the form. Otherwise, they see the error message "You don't have privileges for viewing this form."
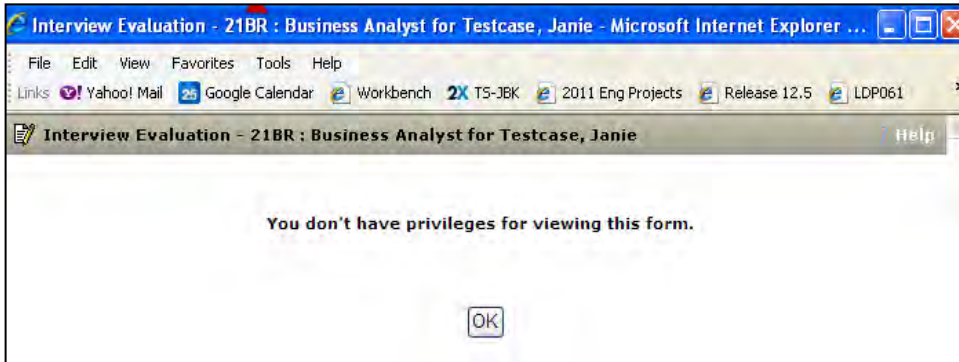
eLink Talent Record

The **eLink** candidate action sends the Talent Record to the designated recipients. When selecting recipients, you can select certain forms to view or complete. The listing of these forms is not limited by user type form privileges. If an eLink is sent to a system user, the eLink checks the user type of the recipient. The system displays appropriate data and form privileges or an error message. If an eLink is sent to a non-system user, the system displays the appropriate data based upon form privileges given to a 'Quickstart' user.

When an eLink is received, the eLink's recipient's user type is used to determine if they have the privileges to add, edit or view a form.

Non-system users (Quickstart user): An eLink recipient with only "View – my reqs" access, sees the error message "You don't have privileges for viewing this form". This is because a QuickStart user cannot have a 'my reqs' relationship with a form.

System user: An eLink recipient with only "View – my reqs" access must have a "my req" relationship with the candidate OR have the "View all" privilege to be able to view the form. Otherwise, they see the error message "You don't have privileges for viewing this form."

Candidate Forms – Viewing Privilege for Req Team | 5
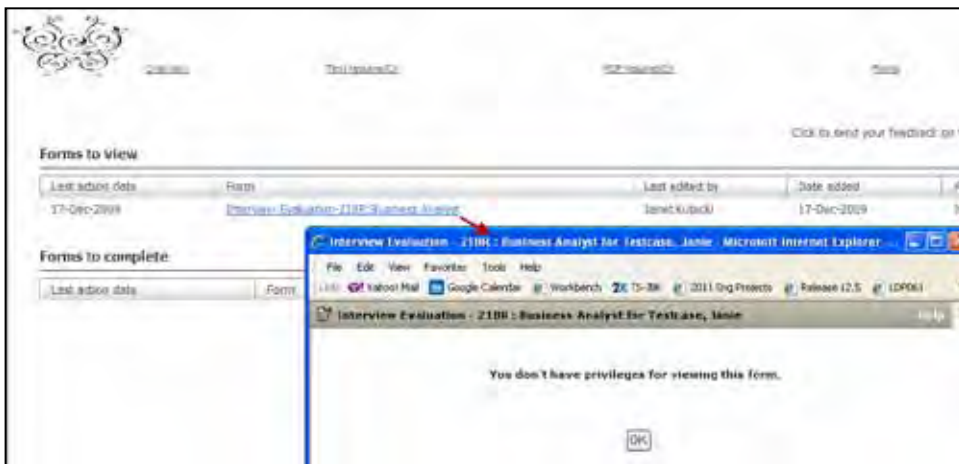
Interaction with "HR Status display existing Optional popup form" Setting

A candidate form can be linked to an HR Status so that it automatically pops up when you update a candidate to that status (via "Update HR status" to a designated status, for candidate in folder from candidate grid or from Talent Record). The following rules apply.

If the client setting "HR Status display existing Optional popup form" = No:

- Standard message "This form has already been completed for this candidate for this req" displays in the following scenarios:

    If the form has been designated as single per candidate and one form has already been completed for the candidate.

    If the form has been designated as a single per candidate per req and one form has already been completed for the candidate for that req.

- Standard message of "This form must be completed in a req folder" displays:

    If the form has been designated as a Candidate/Req form and the HR action is happening outside of a Req folder.

- No message displays:

    If the user does not have the privilege to add the form.

If the client setting "**HR Status display existing Optional popup form**" = **Yes**:

- An appropriately privileged user can view or edit the *existing* form linked to the HR status to pop up (if the form has been designated as a Candidate/Req form and the HR action is happening inside of a Req folder). When the candidate form pops up, the user type privileges is respected:

    If user has "Add/View/Modify My" form privileges AND the user is the existing form creator, the form will be in **edit** mode.

    If user has "Modify all" form privilege, the form will be in **edit** mode.

    If user has "Modify – my reqs" form privilege AND the user has a 'my' relationship with the req, the form will be in **edit** mode.

    If user does not have "Add/View/Modify My" or "Modify All", but has "Modify – my reqs" form privilege and the user does NOT have a 'my' relationship with the req (or HR status is updated in a working folder and not a req), the form will display in **view** mode (if user has "View all" privilege; else message "Candidate status has been updated" displays)

    If user has "View all" but NOT any relevant "Modify" privilege (per above) , the form will be in **view** mode.

    NEW If user has "View – my reqs" AND the user has a 'my' relationship with the req but NOT "Modify – my reqs" or "Modify all" or Add/View/Modify My and is form creator, the form will be in view mode.

    NEW If user has "View – my reqs" AND the user does NOT have a 'my' relationship with the req (or HR status is updated in a working folder and not a req) but NOT "View – all" or "Modify all" or Add/View/Modify My and is form creator, the message "Candidate status has been updated" displays.

Communications – Send Letter

Creation and merging of form field data in a letter respects the **View – my reqs** form privilege. If you have the access to the view the information on the form, you can merge the data (via "Send Communication" for candidate in grid or from Talent Record for a letter, *not* including merged blurbs).

If the form merge field is on a single candidate/req or multi candidate/req candidate form, in order for the data to merge, you need at least one of the following view privileges:

- "Add/View/Modify My" form privileges AND the user is the form creator
- "View all" form privilege
- "View – my reqs" form privilege AND the user has a 'my' relationship with the req

If you do not have any of the view privileges *and* these fields are **required** for the letter, then you will not be able to generate the letter; if fields are **optional**, then communication will be generated with blank values for these merge fields (as if values did not exist).

Limitations and Known Issues

If a user type does not have access to **View-All** for a form template, the system does not restrict the access to that form data when merging for emails, blurbs or documents. The **View-my req** form privilege will work similarly to create consistency between the functionalities.

How Do Clients Get this Feature?

This feature is controlled by a new form level privilege that designates user types who can view the form if they have a 'my req' relationship with the candidate. Please contact your Kenexa Support Team or Certified Workbench User for more information.

Workbench Self-Service Certified Users

You set the new form-level privilege, "View – my reqs, " in **Tools > Forms > Candidate forms > Edit form attributes** [for selected form].

Selected user types can view a per-req candidate form if they have a 'my reqs' relationship with candidate and the associated requisition.

You can select or edit options for this field only when the **Form multiples** = **Single per candidate/req combination** OR **Multiple per candidate/req combination**.

Candidate Portal – Extending SSO Authentication

This feature extends Kenexa's Single Sign On (SSO) authentication capability to candidate portals on SSO-enabled Talent Gateways (TGs). This means logged-in 2xB users on TGs can now directly link to those internal candidate portals.

Product RDP551 Rel 13.0	Þ 2x BrassRing	Þ Talent Gateways
Visible Changes	Þ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	Þ Configuration required – contact your Kenexa Support Team for implementation details.	

Feature Description

This feature extends Kenexa's SSO authentication to candidate portals on SSO-enabled Talent Gateways (TGs). Logged-in 2xB users can now link directly to internal candidate portals on SSO-enabled TGs,. This functionality gives portal users a streamlined workflow.

2x BrassRing User Experience

Previously, 2xB users had to log in (re-authenticate) each time they accessed a candidate portal. Now when loggin-in 2xB users need to access a candidate portal on an SSO-enabled TG (such as an internal TG), they simply click the access link (or access the URL directly via browser). They bypass the login screen and proceed directly to the Welcome page.

Limitations and Known Issues

Kenexa engineering must work with clients to configure SSO authentication for candidate portals. Maintenance requests may be required.

Candidate Portal settings must be enabled for this functionality to be available. This feature is available for Full Talent Gateways only.

How Do Clients Get this Feature?

This feature is controlled by new Talent Gateway attributes. Please contact your Kenexa Support Team for more information about enabling this feature.

Kenexa Tasks

Before enabling the new TG attributes to enable candidate portal SSO authentication, enable both Talent Gateway (TG) SSO authentication and the Candidate Portal.

Once enabled, the SSO Candidate Portal setting cannot be disabled if any of the client's existing Candidate Portals are associated with the SSO Candidate Portal Login URL.

Workbench

In WB:

1. **Tools > Talent Gateways > Admin**.
   The Talent Gateway Administration page displays:

   Select a gateway (or add new) and click the **edit** icon.
   The Talent Gateway page displays.
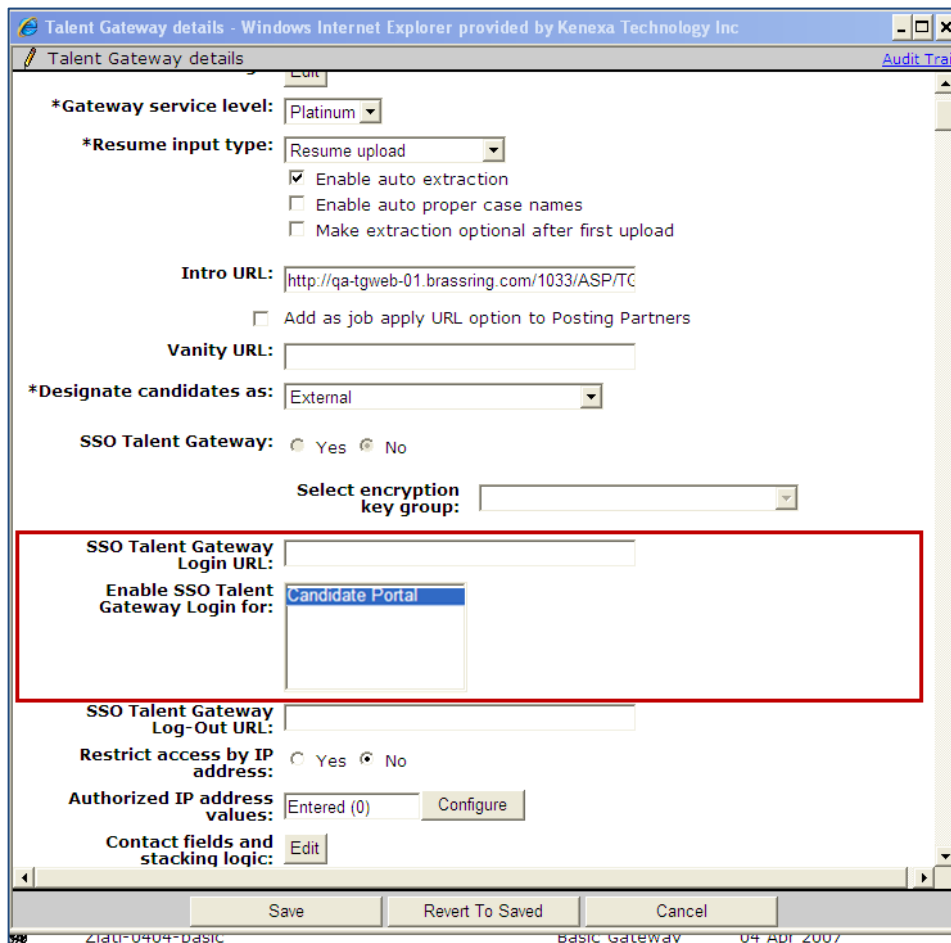
2. Enter URL in **SSO Talent Gateway Login URL** text box, maximum 2000 characters ("SSO Talent Gateway" setting must be "Yes").
3. Select the candidate portal target. in the **Enable SSO Talent Gateway Login for**: multi-select box. SSO authentication will be extended to this candidate portal (Candidate Portal client setting must be "Yes").
4. Click **Save**.

5. Click the View Details icon.
   The TG Detail dialog box displays SSO configurations. :

Designate candidates as:	External
SSO Talent Gateway:	No
Select encryption key group:	
SSO Talent Gateway Login URL:	https://workbench.brassring.com/bradmin/Login/ASP/frames.asp
Extend SSO Talent Gateway Login URL for:	Candidate Portal Agency Manager
SSO Talent Gateway Log-Out URL:	
Restrict access by IP address:	No
Authorized IP address values:	Entered (0) View
Contact fields and stacking logic:	First Name : Last Name : Home phone 01SL: first name AND (email OR home phone)

Candidate Search – Enhancements

The Candidate Search enhancement now includes AND logic when 2xB users search multiple criteria fields during candidate searches. This search enhancement returns results found when matching ANY or ALL of the selected search criteria fields.

Product **Release: 13.0**	☑ 2x BrassRing
Visible Changes	☑ No – requires specific conditions / configuration for visibility.
How do I get this feature? **RDP 516**	☑ Configuration required – contact your Kenexa Support Team for implementation details.

Feature Description

The Candidate Search enhancement now includes the ability to select either OR logic or AND logic when 2xB users search multiple criteria fields during candidate searches. Multiple selection form fields can include checkboxes, list boxes, scaled selected boxes, and grid-type multi-select boxes (for Talent Gateway standard forms only).

Previously, when 2xB users selected multiple criteria fields during candidate searches, the search used OR logic. For example, using OR logic if three Language search criteria fields are English, French, and German, the search returns any candidates who match English OR French OR German.

This enhanced search feature also allows users to search using AND logic when desired. For example, when AND logic is selected and the Language search criteria fields are English, French, and German, the search returns only those candidates who match English AND French AND German.

2x BrassRing Users

When this feature is configured, two new search selection buttons dynamically display on the Candidate Search screen. 2xB users can choose to search for candidates with ALL search criteria (AND logic) or for candidates with ANY search criteria (OR logic).

To search with the enhanced search logic:

1. In 2xB, click **Candidates > Search.**
   The Search Criteria screen displays with the two new Search selection buttons.
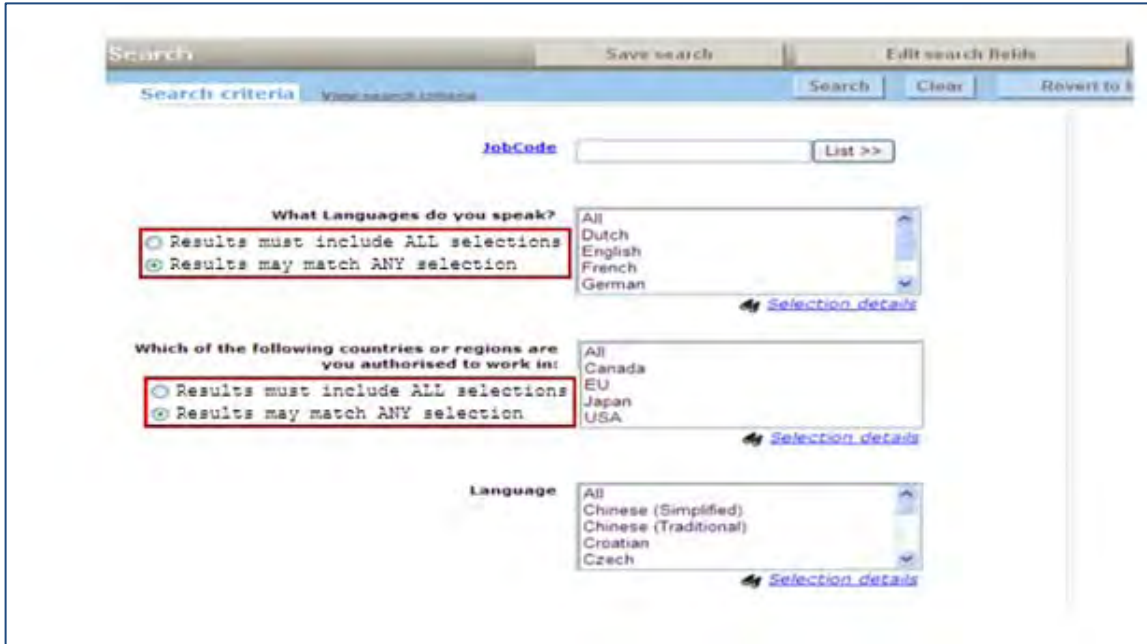
2. For multi-select search fields, select the ALL or ANY search option radio button.
   ALL will return any candidates who match *value1* AND *value2* AND…*valueN*.
   ANY will return any candidates who match *value1* OR *value2* OR…*valueN*.
3. Click to select the specific filed option values in the list box. You can select the value "All" *only* if you selected "Results may match ANY selections"
   If you choose the value "All" in the list box after selecting "Results must include ALL selections" 2xB displays an error message:
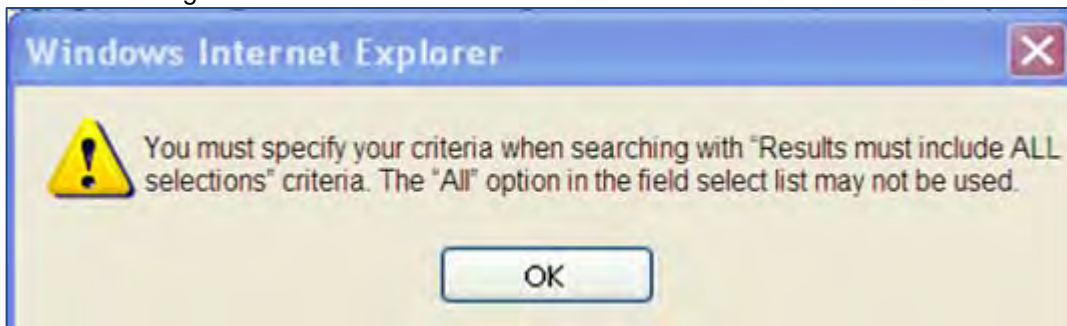
4. Select the ALL or ANY option for the multi-select search in the second list box using the radio button.
5. Click to select the specific search criteria in the list box.
6. Click **Save Search** in the top menu bar to Save your search or **click Search** to perform the search.

Both "Refine search" (link on search results page) and "Revert to last search" (button on search page) functions will retain "Results must include ALL selections" and "Results can match ANY selection" selections for all relevant fields.

Viewing Candidate Searches

When candidate searches complete, 2xB users can view the results for each completed search. In 2xB:

1. Go to **Candidates > Saved Searches**.
   The My Saved Searches screen displays.

2. Select a Saved Search and **click** on the Binocular Icon in the View Criteria column. The View Saved Searches screen displays:
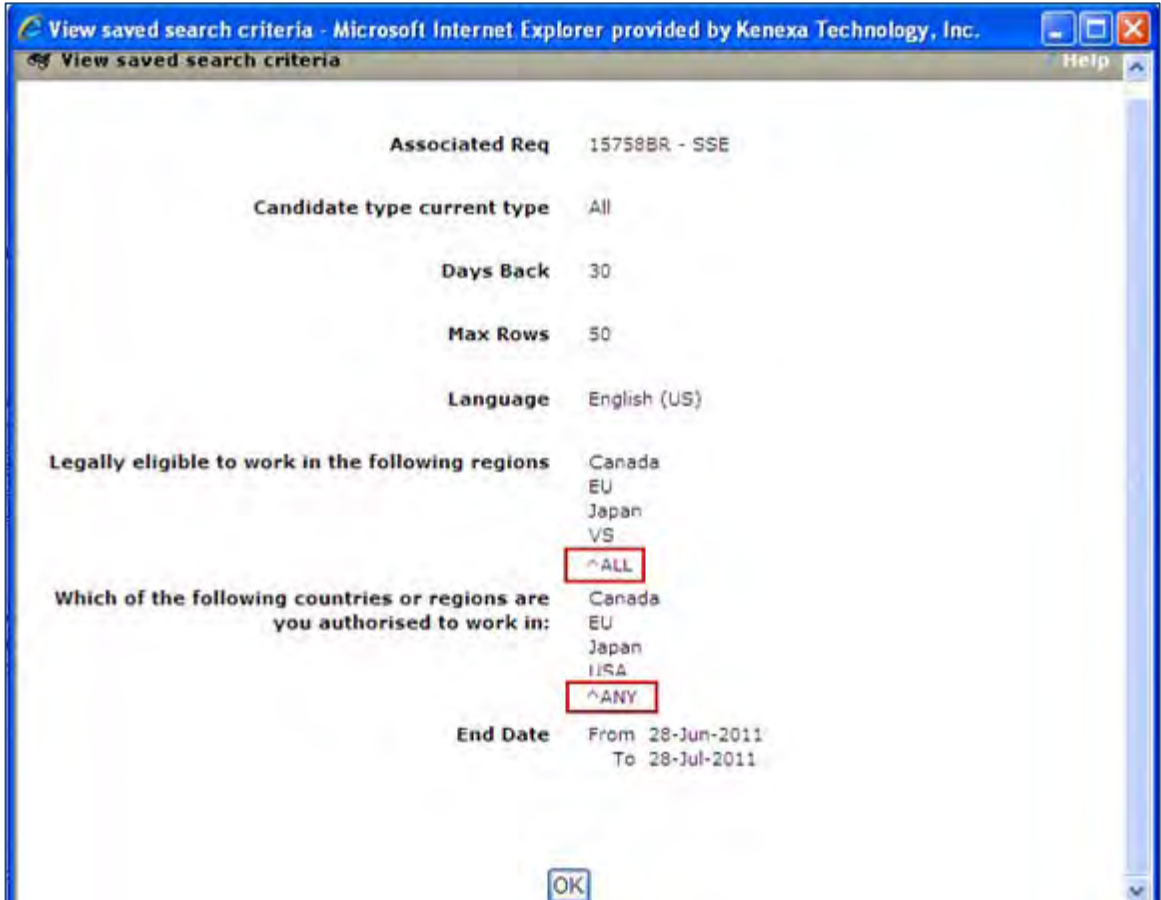
The View saved search screen displays the saved search criteria, including multiple values for each search field. The screen also indicates whether the search required a match for all criteria for inclusion in the results (^ALL), or allowed a match for any criteria (^ANY) for inclusion. However, grid type questions may use the "ALL" option for search, but the View version of search criteria will not indicate which option was used.

Saved searches and overnight searches created **prior** to enabling this setting will continue to run with default "Results may match ANY selection" (as they did before).

Limitations and Known Issues

Once configured and enabled, this feature cannot be disabled without deleting any saved searches using the enhancement feature.

How Do Clients Get this Feature?

The Candidate Search enhancement feature is controlled by a new client setting. Please contact your Kenexa Support Team for more information.

Kenexa Tasks

Workbench

Configuring the Candidate Search Enhancement requires editing Client settings. The Candidate Search Enhancement feature for multi-select fields uses the logic operator AND. Enabling the logic operator AND for Candidate searches also configures the display of the Search Selection buttons.

Use the following procedure to configure the Candidate Search Enhancement feature in Workbench.

1. In WB: **Admin > Manage Clients > Edit Client's settings**.
2. **Select** YES using the radio button to enable on the Edit clients settings screen.

3. Click **Save**.

Communications - Dynamic Paragraph Numbering

This feature introduces the ability to configure dynamic paragraph numbering to document template content (blurbs and paragraphs). At document generation time, dynamic paragraph numbering combines all document template content elements and applies the configured numbering format.

Product	☑ 2x BrassRing
LDP063	☑ Workbench Self-Service
Visible Changes	☑ No – requires specific conditions / configuration for visibility.
How do I get this feature?	☑ Configuration required – contact your Kenexa Support Team for implementation details.

Feature Description

This feature introduces the ability to configure and apply paragraph numbering formats (for example, 1, 1.1, and so forth) to document template content and blurbs. At document generation time, paragraph numbering is applied dynamically to the generated document after all merging is done. Template administrators can now configure unique numbering formats to fulfill specific document requirements that 2xB users can access during document creation. At document generation time, dynamic paragraph numbering combines all document template content elements and applies the configured numbering format. Document content elements can be text, merge fields, and blurbs with pre-configured numbering formats.

At this time there are five (5) numbering levels available, NL (0 level) and four nesting levels. The NL level is used to left align content and is a default, non-configurable level. The remaining four levels are considered nesting levels. The syntax representing the numbering levels is: {#NL#}, {#L1#}, {#L2#}, {#L3#}, and {#L4#}. Template administrators can configure the precise positioning of each of the four nesting levels.

Blurbs can also contain pre-configured numbering formats. If a blurb contains a separate, pre-configured numbering format, the system recognizes the separate numbering scheme and incorporates it into the document.

For example, the following document has text content and a blurb. A numbering format has been applied to the text content and the blurb contains a separate, pre-configured numbering format.

In preview mode, the system recognizes the numbering format in the document content and in the blurb and combines both numbering formats in the preview.

November 10, 2011

RE: [#Contact-info:JobTitle#]

Dear [#Contact-info:FirstName#] [#Contact-info:LastName#],

We are pleased to extend this offer to you for the [#Contact-info.JobTitle#] position. Let me highlight the opportunities this position offers.

1   Thirty-hour work week
    1.1   Telecommute option
2   Professional recognition in the writing field
    2.1   Forbes listed our firm as excelling in the journalism industry
3   Employer paid medical and dental benefits
    3.1   Provider of your choice

[#blurb 1 Blurb with Level Tags#] This sentence has no level tag applied to it. It also starts before any level tags have been applied to this blurb. Therefore, it will be aligned at the left margin of the page, however that is defined.

4   Heading level 1
    Here is a paragraph following a level 1 tag that has no 'level' tag applied to it.

    4.1   Heading level 2
        Here is a paragraph following a level 2 tag that has no 'level' tag applied to it.

        4.1.1   Heading level 3
            Here is a paragraph following a level 3 tag that has no 'level' tag applied to it.

            4.1.1.1   Heading level 4
                Here is a paragraph following a level 3 tag that has no 'level' tag applied to it.

2x BrassRing Users

Two types of 2xB users can access and use this feature:

1. Template administrators who create and apply the numbering format(s) to blurbs, document templates, and document content elements.

2. 2xB users in other administrative roles (Recruiters, Hiring Managers) who access and use the document templates and content created by the template administrators.

A 2xB user with Communication privileges can create paragraph numbering formats and apply them to blurbs and document templates.

2xB users who generate documents for candidates using the Create document feature can use templates configured with paragraph numbering formats. When a 2xB user selects a candidate and creates a document, 2xB combines the merge fields and numbering format into the document.

In 2xB, users create documents from within a requisition folder.

1. Select a candidate in the Req folder.
   Candidates display in the Candidate Results Panel.
2. Select a candidate and click **Create documents** on the Actions menu.
3. Click **List** and select a document template with numbering formats as specified by your template administrator.

4. Click **Go**.
   The system uses the document template to structure the document, incorporating merge fields and blurbs with pre-configured numbering format.
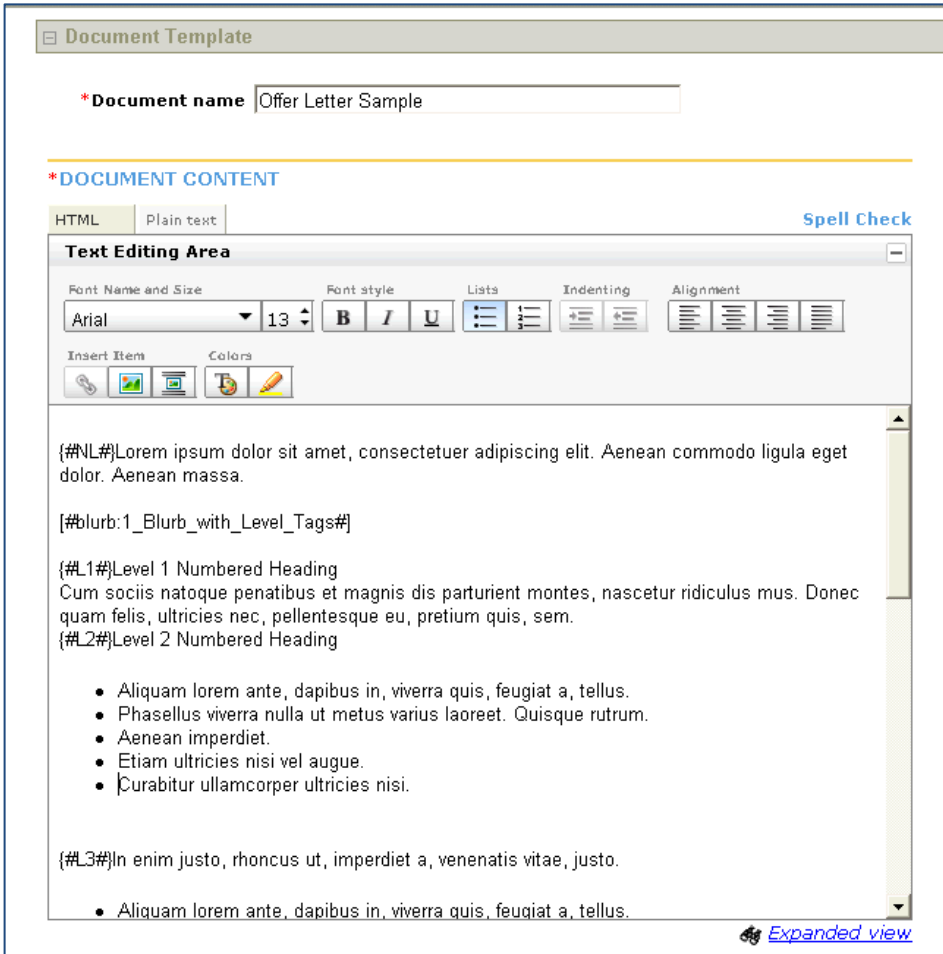
5. Click **Preview** to see a document preview.

Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.

This sentence has no level tag applied to it. It also starts before any level tags have been applied to this blurb. Therefore, it will be aligned at the left margin of the page, however that is defined.

1   Heading level 1
     Here is a paragraph following a level 1 tag that has no 'level' tag applied to it.

     1.1   Heading level 2
            Here is a paragraph following a level 2 tag that has no 'level' tag applied to it.

            1.1.1   Heading level 3
                     Here is a paragraph following a level 3 tag that has no 'level' tag applied to it.

                     1.1.1.1   Heading level 4
                                Here is a paragraph following a level 3 tag that has no 'level' tag applied to it.

What happens to sentences and paragraphs that have the 'no level' tag on them?
The next group of headings follow a paragraph tagged with

.

2   Heading level 1
     Here is a paragraph following a level 1 tag that has no 'level' tag applied to it.

     2.1   Heading level 2
            Here is a paragraph following a level 2 tag that has no 'level' tag applied to it.

            2.1.1   Heading level 3
                     Here is a paragraph following a level 3 tag that has no 'level' tag applied to it.

                     2.1.1.1   Heading level 4
                                Here is a paragraph following a level 3 tag that has no 'level' tag applied to it.

                                What happens to sentences and paragraphs that have no tag on them?

3   Level 1 Numbered Heading
     Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem.

Dynamic Paragraph formatting displays the document content with numbering formats applied.

Note: **Preview** only displays the effect the numbering format has on the document template content. Token fields are not resolved until run time also called document generation time.

Limitations and Known Issues

At this time, dynamic paragraph numbering is only available for document templates.

How Do Clients Get this Feature?

This feature is controlled by a new user type privilege that determines who can add, edit, and delete numbering formats used in document templates. Please contact your Kenexa Support Team or Certified Workbench User for more information.

Workbench Self-Certified User

Workbench self-certified users can access existing user type permissions and set the communication privilege for dynamic paragraph numbering for template administrators.

1. Select **Tools > Users > User Types**.
2. Select User.
3. Click **Edit Type Permissions** icon.
4. Select the **Set Privilege** icon in the Communications Module. The Communications Privilege dialog box displays.
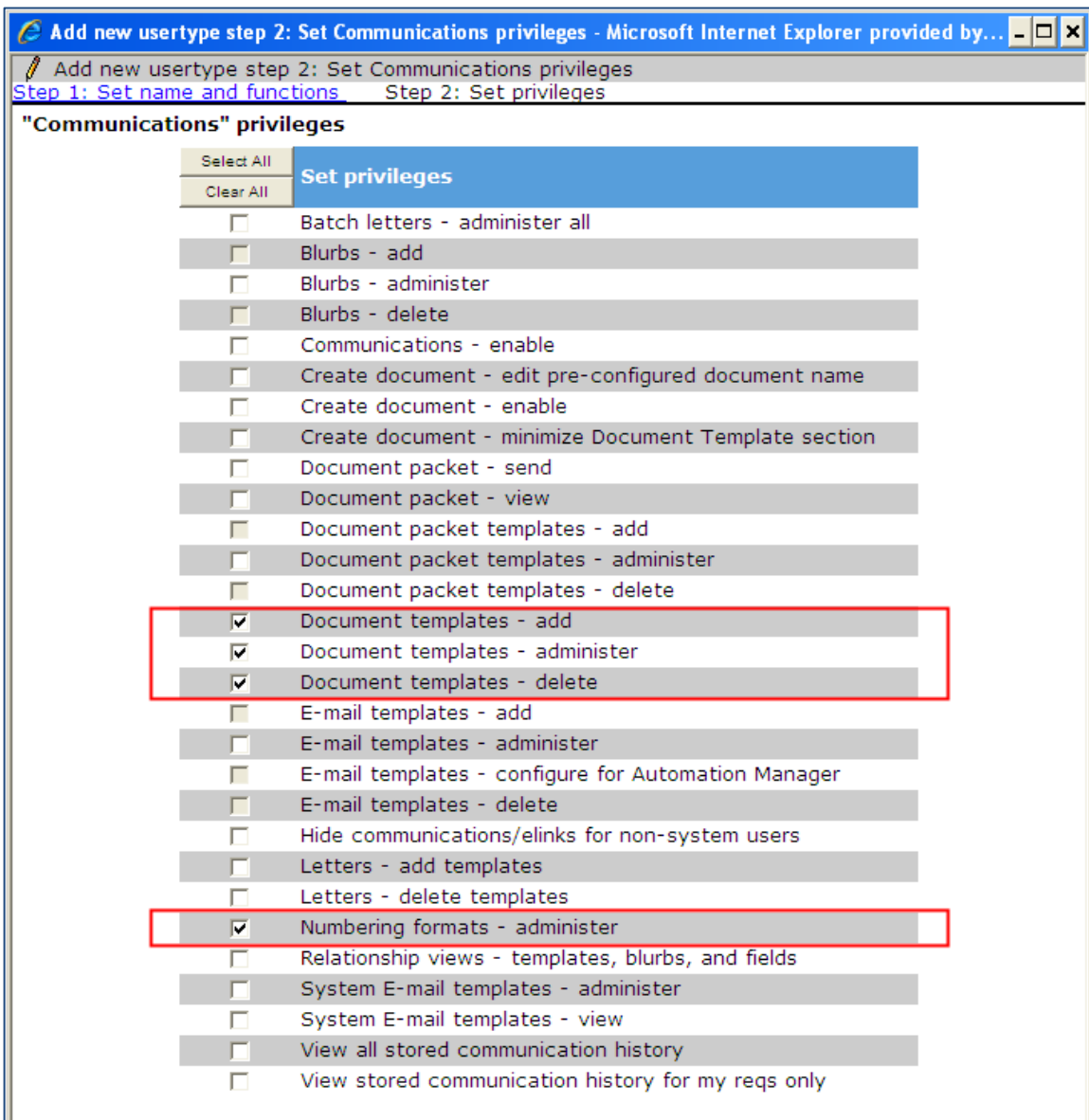
5. Select the checkbox for these four privileges.

- Document templates – add

- Document templates – administer

- Document templates – delete

- Numbering formats – administer

6. Click **Done**.
7. Click **Save**.

2x BrassRing Template Administrator

After enabling the appropriate user type privileges for document templates and numbering formats in Workbench for template administrators, administrators can then define the numbering formats and create document templates.

Configuring Dynamic Paragraph Numbering

Template administrators create numbering formats. Once created and saved, numbering formats can be accessed when template administrators create templates and by 2XB users when they create documents using those templates.

In 2xB:

1. Select **Admin > Communications > Add Numbering Format** to create a new numbering format,

– OR –

Select **Admin > Communications > Numbering Formats** > Select **Edit** icon to edit numbering formats.

The Add numbering format dialog box displays.

2. Enter the required information for the document template numbering for each field. Refer to the following table for entry descriptions.

Entry	Description
Format Name	Enter the numbering format name. Character limit is 50 characters.
Paper Size	Select a paper size from the drop-down list box. Letter (8.5 X 11 in.) or A4 (8.3 X 11.7 in.).
Number Format	Select the numbering format from the drop-down list box.
How many levels?	Select the number of levels to include from the drop-down list box.
Alignment units	Select alignment units (inches or millimeters).

Start number at:
    Level 1
    Level 2
    Level 3
    Level 4
	Number format structure is determined by the position where each numbered level begins. Enter desired values into each text box.

Entry	Description

Start text at:
    Level 1
    Level 2
    Level 3
    Level 4
	Text alignment structure is determined by the position where each text alignment level begins. Enter desired values into each text box.

3. Click **Preview** to preview the numbering format.
   The preview screen displays.
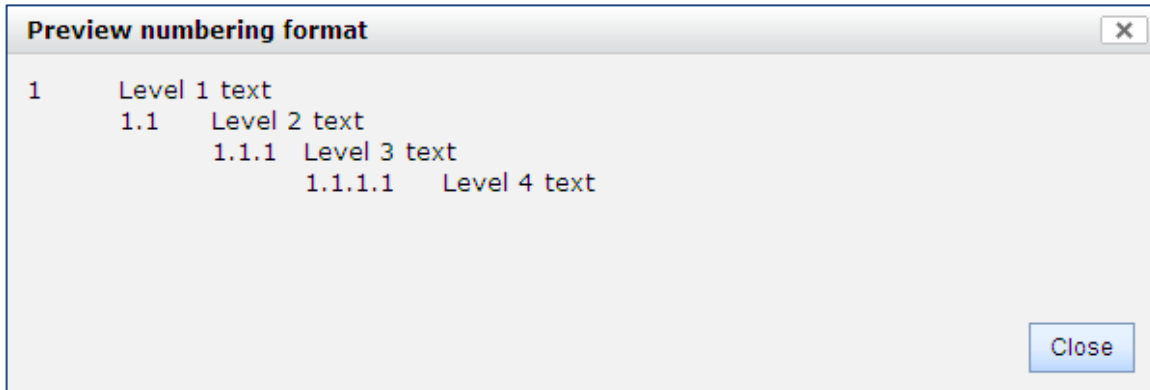
Note: The default 0 Level numbering format ({#NL#} is added to all numbering formats. The 0 Level numbering format always aligns characters at whatever is defined as the left margin.

4. Click **Close.**
5. Click **Save**.
   The system prompts the numbering format has been saved.
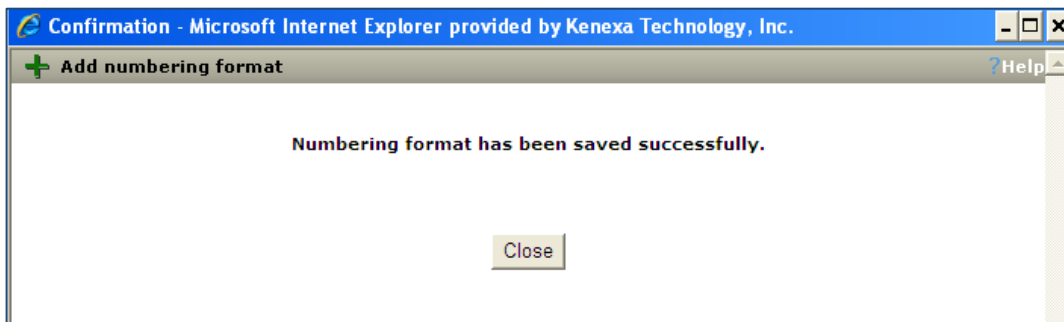
6. Click **Close**.

Configuring Blurbs with Numbering Formats

Numbering formats can also be used in blurbs. When blurbs with numbering formats are incorporated into document templates, blurb numbering formats inherit the numbering format in the document template. In blurbs, numbering formats must be manually inserted.

Use the following procedure to manually insert numbering formats into blurbs.

In 2XB:
1. **Admin > Communications > Add Blurb.**
   The Add Blurb screen displays.
2. Complete the required fields. To view detailed information about each specific field in the document template screen, click **Help** in the upper right hand corner.
3. Enter blurb content (text and merge tokens) in the **Text Editing Area**.
4. Position cursor in document content where you want numbering to begin and manually enter the numbering format tag. The syntax is: {#Lnumeral#}, with the numeral identifying the nesting level. Numbering format tag choices are:

Level 0	{#NL#}	This is a default numbering level which aligns content at the left margin.
Level 1	{#L1#}	Level 1 is the first numbering level.
Level 2	{#L2#}	Level 2 is the second nesting numbering level.
Level 3	{#L2#}	Level 3 is the third nesting numbering level.
Level 4	{#L4#}	Level 4 is the fourth nesting numbering level.

The following example shows a blurb with manually inserted numbering tags.
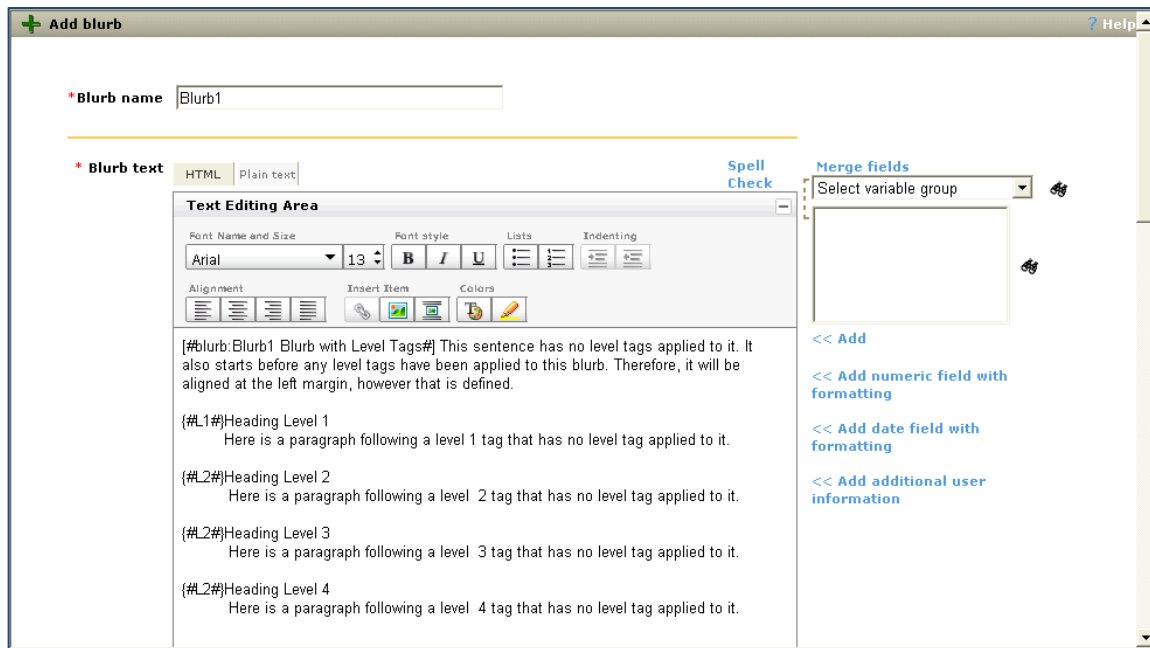
When the blurb is added to a document template with a numbering format, the blurb inherits the document template numbering format.

Configuring Document Templates

When numbering formats are configured, 2xB template administrators can access those numbering formats when creating document templates. During document template creation, use the Preview Document Structure button to view the text display with the numbering format

Use the following procedure to add numbering formats to document templates.

In 2xB:

1. **Admin > Communications > Add document template**.
   The document template screen displays. The following screenshot represents the top half of the document template screen.
2. Complete the required fields. To view detailed information about each specific field in the document template screen, click **Help** in the upper right hand corner.
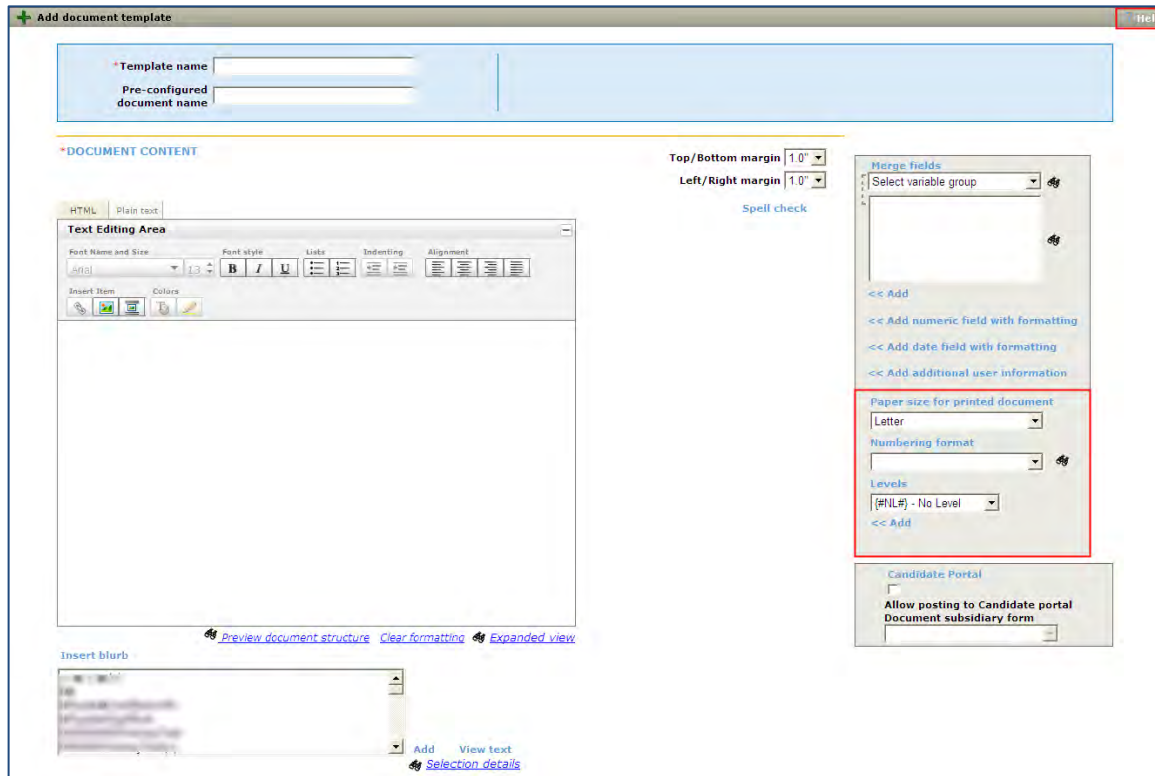
3. Select the **Paper Size for Printed Document** using the drop-down list box.
4. Select the **Numbering Format**.

> Note: Use the default 0 Level numbering format ({#NL#} to left align characters at the margin in the Text Editing Area.

5. Enter document template content (text and merge tokens) in the **Text Editing Area**.
6. Position the cursor in the document content where you want numbering to begin.
7. Select the numbering format level from the drop-down list box and click **Add**.
   The numbering format symbol appears in the document template content window.
8. Select a blurb and click **Add**.

> **Note:** Numbering formats must be selected before blurbs are added to the document template.

*DOCUMENT CONTENT

HTML | Plain text

Text Editing Area

Font Name and Size | Font style | Lists | Indenting | Alignment
Arial | 13 | **B** *I* <u>U</u>

Insert Item | Colors

{#NL#}November 10, 2011

RE: [#Contact-info:JobTitle#]

{#NL#}Dear [#Contact-info:FirstName#] [#Contact-info:LastName#],

We are pleased to extend this offer to you for the [#Contact-info:JobTitle#] position. Let me highlight the opportunities this position offers.

{#L1#}Thirty-hour work week
{#L2#}Telecommute option
{#L1#}Professional recognition in the writing field
{#L2#}Forbes listed our firm as excelling in the journalism industry
{#L1#}Employer paid medical and dental benefits
{#L2#}Provider of your choice

{#NL#}[#blurb:1_Blurb_with_Level_Tags#]

Preview document structure   *Clear formatting*   *Expanded view*

9. Click **Preview Document Structure** to display the numbering format structure in the document template.

Preview document structure

November 10, 2011

RE: [#Contact-info:JobTitle#]

Dear [#Contact-info:FirstName#] [#Contact-info:LastName#],

We are pleased to extend this offer to you for the [#Contact-info:JobTitle#] position. Let me highlight the opportunities this position offers.

1   Thirty-hour work week

   1.1   Telecommute option

2   Professional recognition in the writing field

   2.1   Forbes listed our firm as excelling in the journalism industry

3   Employer paid medical and dental benefits

   3.1   Provider of your choice

[#blurb:1 Blurb with Level Tags#] This sentence has no level tag applied to it. It also starts before any level tags have been applied to this blurb. Therefore, it will be aligned at the left margin of the page, however that is defined.

4   Heading level 1
       Here is a paragraph following a level 1 tag that has no 'level' tag applied to it.

   4.1   Heading level 2
            Here is a paragraph following a level 2 tag that has no 'level' tag applied to it.

      4.1.1   Heading level 3
                Here is a paragraph following a level 3 tag that has no 'level' tag applied to it.

         4.1.1.1   Heading level 4
                     Here is a paragraph following a level 3 tag that has no 'level' tag applied to it.

The preview displays the document numbering format and the numbering format in the blurb.

10. (Optional) You can also align the pop-up window next to the document template screen to view how the numbering format appears in document template as shown in the following example, or you can click **Print** and print out the document structure view.
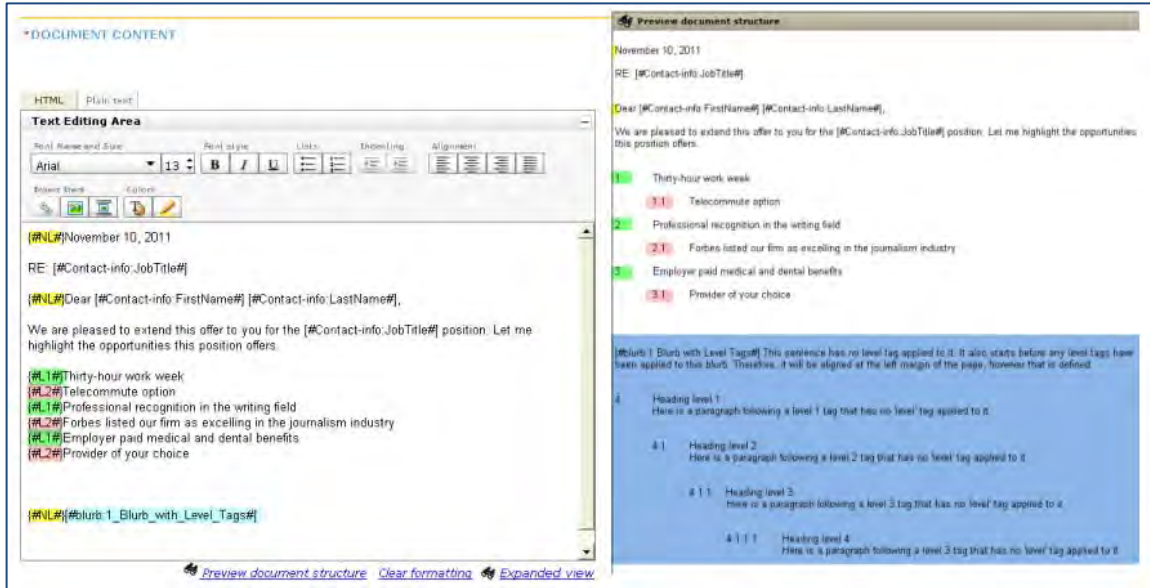
11. Click **OK** to close pop-up window or click **Print** to print preview screen.

> Note: **Preview Document Structure** only displays the document content in its entirety including all blurb content irrespective of conditions with the numbering format applied. Merge field tokens resolve at document generation time.

12. Complete the remaining required fields.
13. Click **Save**.

Other 2xB users can now use this document template in the Create document process.

Communications – Recruiter/User Signatures Image Tokens

This feature enables users to configure two signature image merge token types, User Signature and Additional User Information Signature, for use in document templates, blurbs, and email templates.

Product	þ 2x BrassRing
RDP539 Rel 13.0	þ Workbench Self-Service
Visible Changes	þ No – requires specific conditions / configuration for visibility.
How do I get this feature?	þ Configuration required – contact your Kenexa Support Team for implementation details.

Feature Description

This feature enables users to configure two new signature merge field tokens representing user signatures images in document templates, blurbs, and email templates. A signature image is a scanned image of a user's hand-written signature that can be imported into the system or uploaded to system user profiles. The two signature image tokens are User Signature and Additional User Information Signature. When you use signature image tokens, a representation of the user's hand-written signature displays in documents, blurbs, and emails at document generation time.

Any user with blurb, document template, or e-mail template privileges can select the user signature image merge tokens for insertion in blurbs, and document or email templates.

Facts common to both uses of the signature image files:

- A 2xB user profile can only contain one signature image file
- Once imported or uploaded, signature image files cannot be deleted, only overwritten
- Importation/upload of signature image files is the same for both signature image token types
- Supported signature image file format is a GIF file (no size restriction)
- 2xB user privileges control use and upload of signature images (2x BrassRing administrator user account administration and/or 2X BrassRing user self-administration)

Once the client setting is configured, clients can designate 2xB Admin+ administrators to oversee and manage signature merge tokens within their organizations or turn on self-administration for 2xB users. Once the template administrator creates the template(s) containing the signature image tokens, the templates are typically available for use by Recruiters, Hiring Managers, and other 2x BrassRing users who are either sending an email (Send communication) or generating a document (Create document, only available from within Req folders) based on templates containing these signature image files. If the signature image of user referenced by the merge token (either the currently logged in user or some other user) is missing, the merge token text appears instead of the signature image in the generated document.

User Signature Image Tokens

User Signature image tokens are fixed and represent a currently logged-in 2xB user.

A typical use case might be a template administrator who wants 2xB users to use a document or email template to create a document or email containing each user's personal signature. The template administrator creates a document template, blurb, or email template containing the User Signature merge token. Blurbs can also contain signature image tokens but must be added to the document or email template before document generation.

A 2xB user whose profile contains a signature image file can log in, create a document or email using the document template (or email template) and user signature image token, and generate a document (or email) with their personal signature.

Additional User Information Signature Image Tokens

Additional User Information Signature image tokens are variable and can typically represent any 2xB user within the system. Using the Additional User Information Signature image token does not require the represented 2xB user to be logged into the system but *must* be used in conjunction with a candidate form containing a single-select, query-select field that pulls from a list of existing 2xB users. This candidate form *must* be uploaded to any candidate's talent record for who the document or email is being generated. Blurbs can also contain signature image tokens but must be added to the document or email template before document generation.

A typical use case might be a template administrator who wants to create a document or email template to be used by multiple 2xB users and wants each document or email to contain the Human Resource (HR) Manager's signature. The template administrator creates a document or email template using the Additional User Information Signature Image token. The 2xB user uploads the required candidate form to the candidate's talent record, selects the HR manager's name from drop-down list of existing 2xB users on the candidate form, creates the document or email using the document or email template and the Additional User Information Signature image token, and generates the document or email with the HR manager's signature.

Preparing to Use Signature Merge Tokens

Before incorporating signature merge tokens in a workflow, clients need to:

- Decide which signature image token type supports their workflow
- Create signature image files
- Decide method for uploading signature images
- Determine which user types are allowed to upload and which user types have access to signature tokens

Creating Signature Image Files

The procedure to create a signature image file varies depending on the software program available. This procedure is intended to be a general outline.

1. Write your signature on a plain piece of paper. If necessary, you can add multiple signatures to one page.
2. Scan your page into your computer.
3. Open the image file in your software program and crop each signature image closely to the edges of the signature. The image size should be the typical size it would be in a hard copy document.
4. Save the image file as a GIF with at least a 96 dpi.

Methods to Bring Signature Image Files into the System

There are four ways both types of signature image files can be installed:

- Bulk import
- Integration XML User Import
- 2xB system administration – If this method is used, 2xB Admin users must have the Users/Edit User privilege
- 2xB Self-Service – If this method is used, each user type must have the Admin/Edit my account privilege

The scope of this document does not include Bulk or Integration methods. Once the client setting is configured, clients can designate 2xB Admin+ administrators to oversee and manage signature merge tokens within their organizations or turn on self-administration by users of their own accounts.

Uploading Signature Images to User Profiles

Before Admin+ users can add user signature images to 2xB user profiles, the Admin+ privileges of edit and administer signatures in 2xB must be enabled. Individual 2xB users must have the edit my account privilege enabled in order to be able to upload a signature image file to their individual 2xB user profile.

Admin+ Users

To upload signature images for 2xB users.

1. **Admin+ > Users**.
2. Click the **Edit** icon for the designated user**.**
   The edit user dialog box displays.
3. Select the **Browse** button next to the **Recruiter/User Signature Image** text box.

4. Browse for the signature image file, select it, and click **Open**.
   The signature image file uploads to the user profile.
5. Click **Save**.

   Hover your mouse over the text box to view the signature image file.
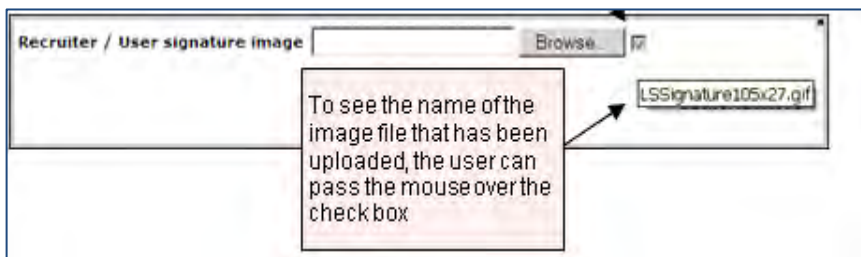
2xB Users

Individual 2xB users must have the edit my account privilege enabled in order to be able to upload a signature image file to their individual 2xB user profile.

To upload a 2xB user signature image in 2xB:

1. **Admin > Edit My Account.**
2. Click the **Edit** icon.
   The Edit My Account dialog box displays.
3. Click **Browse** next to the **Recruiter/User signature image**.

4. Select the file and click **Open**.
5. Click **Save**.

Using Signature Merge Tokens

User signature merge tokens can be incorporated into document and email templates and blurbs. This procedure specifies document templates, but the procedure is the same for email templates and blurbs. When a 2xB user profile contains their signature image, that 2xB user can log on, access the template or blurb and add the user signature merge token. The token format for the User Signature token is:
[#User-info: UserSignatureImage#].

User Signature Merge Token in Document Templates

To create a document template using the user signature token:

1. Select a candidate in the Candidate's Panel in a Req folder or from a candidate's Talent Record.
2. Click **Send Communication** from the Action menu.
   The Communication dialog box displays.
3. Select a document template from the drop-down list box.
4. Click **Go**.
   The Communications dialog redisplays the Communication History.
5. Click the **Edit** icon on the chosen template.
   The document template displays.
6. Select the **User Profile** merge field.
   The user profile merge tokens populate in the list box.
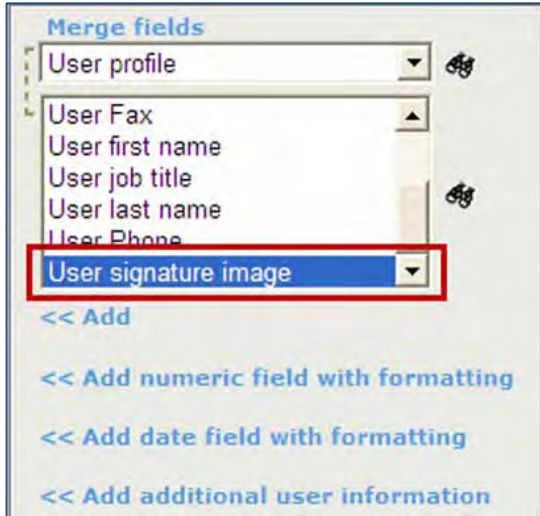
7. Select **User signature image** and click **Add**.
   The User Signature image token displays in the document template Text Editing Area. This token represents the signature image of the logged-in 2xB user.
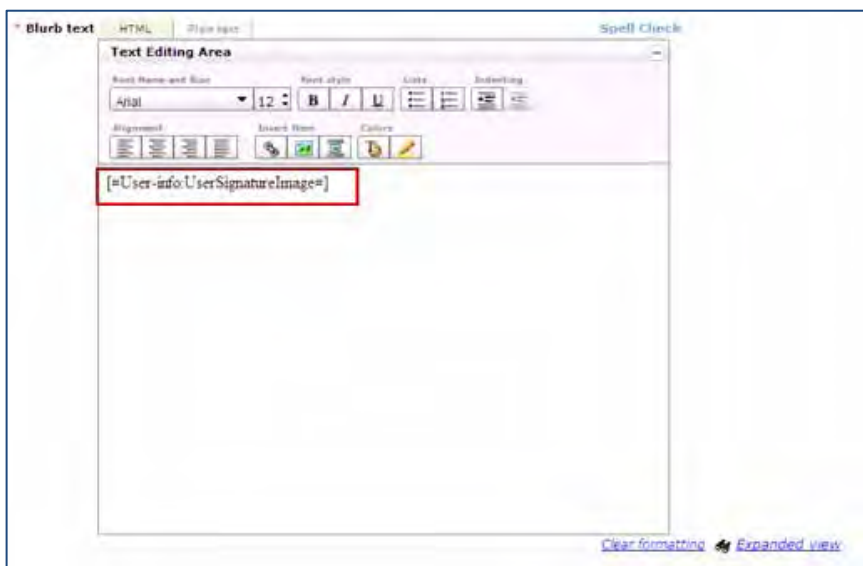
8. Click **Preview** to preview the signature image within the document.
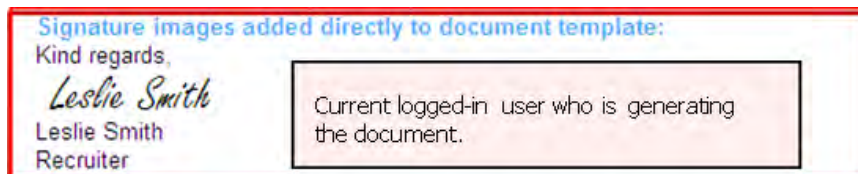
9. Click **Save** as PDF.
10. Click **Save** to save the document. The generated PDF is saved to the Attachment tab on the candidate's Talent Record.

Using Additional User Information Signature Merge Tokens

When this feature is enabled and all configuration criteria have been met, 2xB administrators can access document or email templates and blurbs and use the additional user information signature image merge token for any 2xB user whether they are logged in or not. The token format for the Additional User Information Signature token is: [#AdditionalUserInfo:AddtlUser#].

When using the Additional User Information Signature merge token, template administrators must ensure that all configuration criteria has been met and that the additional signature user has been chosen on the candidate form.

Configuration criteria for the Additional User Information Signature Merge Token

- Additional user profiles must contain signature image GIF file.
- Candidate Talent Record (TR) must contain a single-select/query-select candidate form.
- Candidate form must be of a one per candidate type and must pull options from an existing 2Xb user list.
- Additional signature user type must be selected on the candidate form from the pull options list at document generation time.

Additional User Information Signature Merge Token in Document Templates

1. Create a single-select/query-select candidate type form with the attribute of One per Candidate or Single per Candidate. This candidate form must be set to pull options from an existing 2xB user list.
2. Save the candidate form.
3. Upload this candidate form to the candidate's talent record.
4. Select a candidate in the Candidate's Panel in a Req folder or from a candidate's talent record.
5. Click **Send Communication** from the Action menu.
   The Communication dialog box displays.
6. Select a document template from the drop-down list box.
7. Click **Go**.
   The document template displays.
8. Select the **User Profile** merge field.
   The user profile merge tokens populate in the list box.
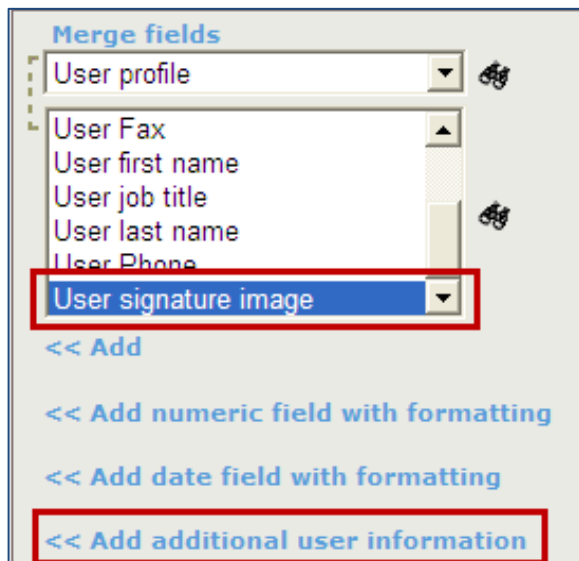
9. Click **Add Additional User Information**.
   The Add Additional User Information dialog box displays.
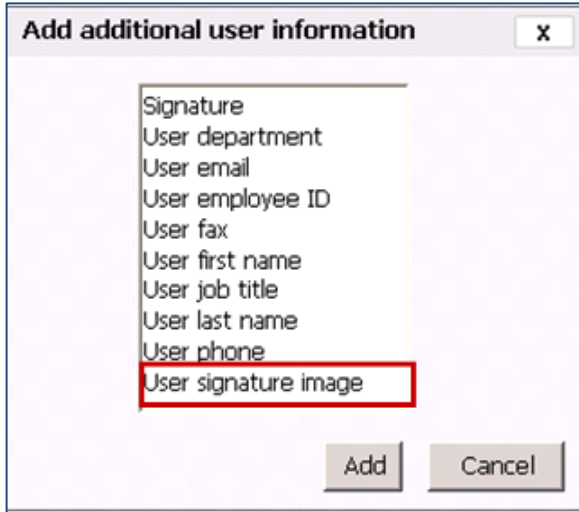
10. Select **User signature image** and click **Add**.
    The Additional User Signature image token displays in the document template Text Editing Area. This token represents the signature image of the Additional User type selected from the pull options list on the candidate form.
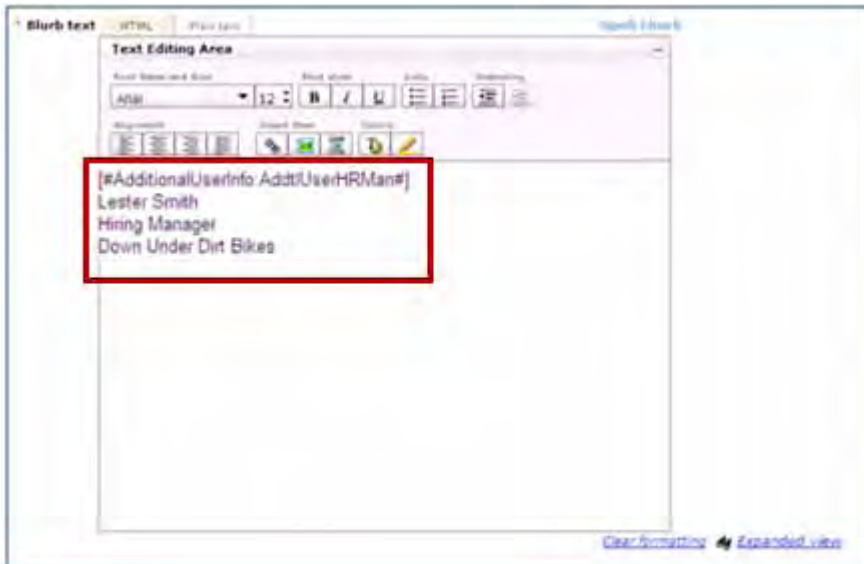
11. Click **Preview** to preview the signature image within the document.
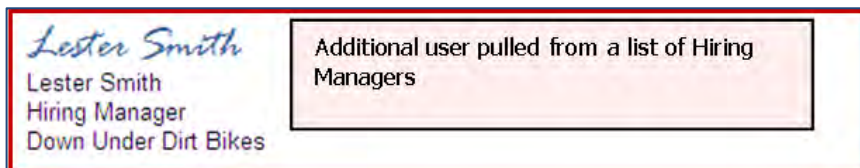
12. Click **Save** as PDF.
13. Click **Save** to save the document. The generated PDF is saved to the Attachment tab on the candidate's Talent Record.

Limitations and Known Issues

This feature is not available for use in Document Packet Templates or letter templates.

How Do Clients Get this Feature?

This feature requires enabling client settings, configuring User Privileges (for Admin+ and 2xB users), and creating and uploading signature image files. Please contact your Kenexa Support Team for more information about enabling this feature.

Workbench Self-Service Certified Users

In addition to client settings, this feature requires configuring signature user privileges for Admin+ and 2xB users. Admin+ signature user privileges allow administrators to administer 2xB user signature files including the upload of signature image files. 2xB edit my account privilege allows 2xB users to upload their own signature image files.
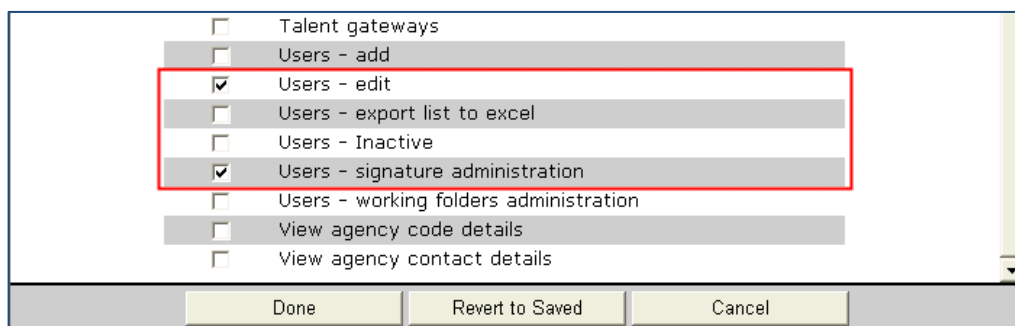
Admin+

To configure Admin+ privileges of edit and administer signatures in 2xB, in WB:

1. **Tools > Users > User Types**.
2. Click the **Edit Type Permissions** icon for the user.
   The Edit Type Permissions dialog box opens.
3. Click the **Set Privileges** icon for Admin+.
   The Admin+ Privileges dialog box displays.
4. Select the privileges **Users – edit** and **Users – Signature Administration** checkboxes.

5. Click **Save**.

2xB Users

To configure 2xB edit my account user privilege, in WB:

1. **Tools > Users > User Types**.
2. Click the **Edit Type Permissions** icon for the user.
   The Edit Type Permissions dialog box opens.
3. Click on the **Set Privileges** icon for Admin.
   The Admin Privileges dialog box displays.
4. Select the privileges **Edit my account** checkbox.
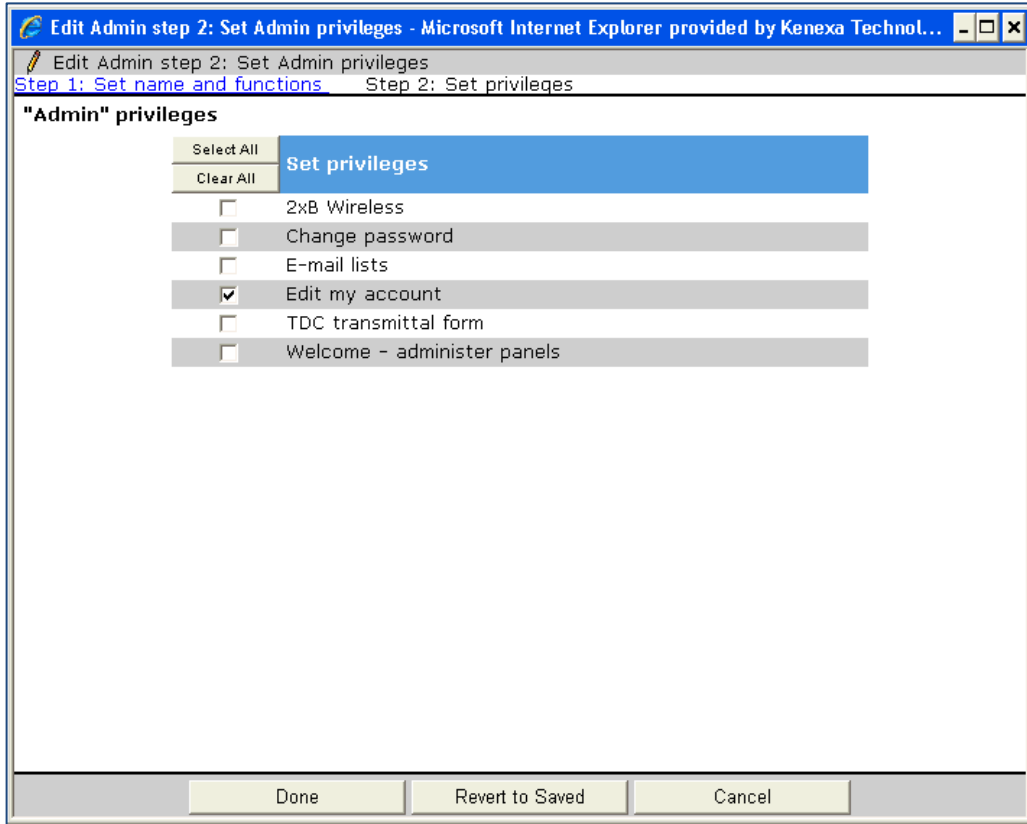
5. Click **Save**.

Kenexa Tasks

The Recruiter/User Signature Image Tokens feature requires two client settings, one for User Signature merge tokens and one for Additional User Information Signature tokens.

Workbench

Enabling User Signature Tokens

In WB:

1. **Admin > Manage Clients**.
2. Click the **Edit** icon.
3. Select the **Yes** radio button for the Recruiter/User signature image.
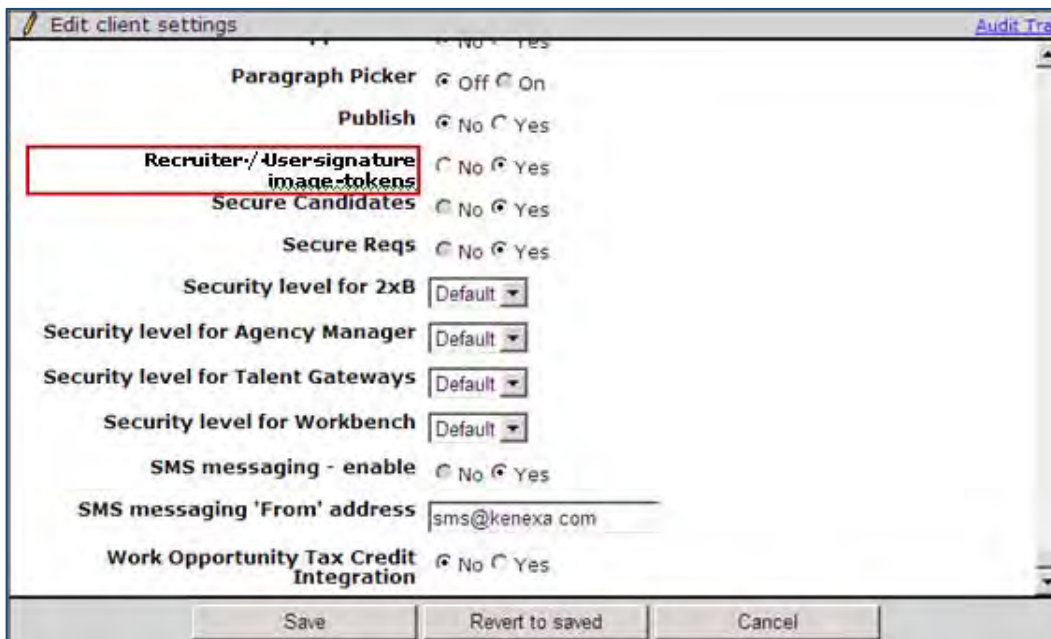
4. Click **Save**.

Enabling Additional User Information Signature Tokens

In WB:

1. **Admin > Client Settings**.
2. Click the **Edit** icon in Client Settings.
3. Select **Yes** for **Enable Additional User Information Merge Fields**.

4. Select **Yes** for **Recruiter/User Signature image-tokens**.

5. Click **Save**.

Communications – Relationship View for Templates, Blurbs, and Fields

This feature introduces a management relationship view between templates, blurbs, merge fields and single and multiple conditions. Template administrators can perform text string searches within communication entities or view all relationship instances for existing communication entities.

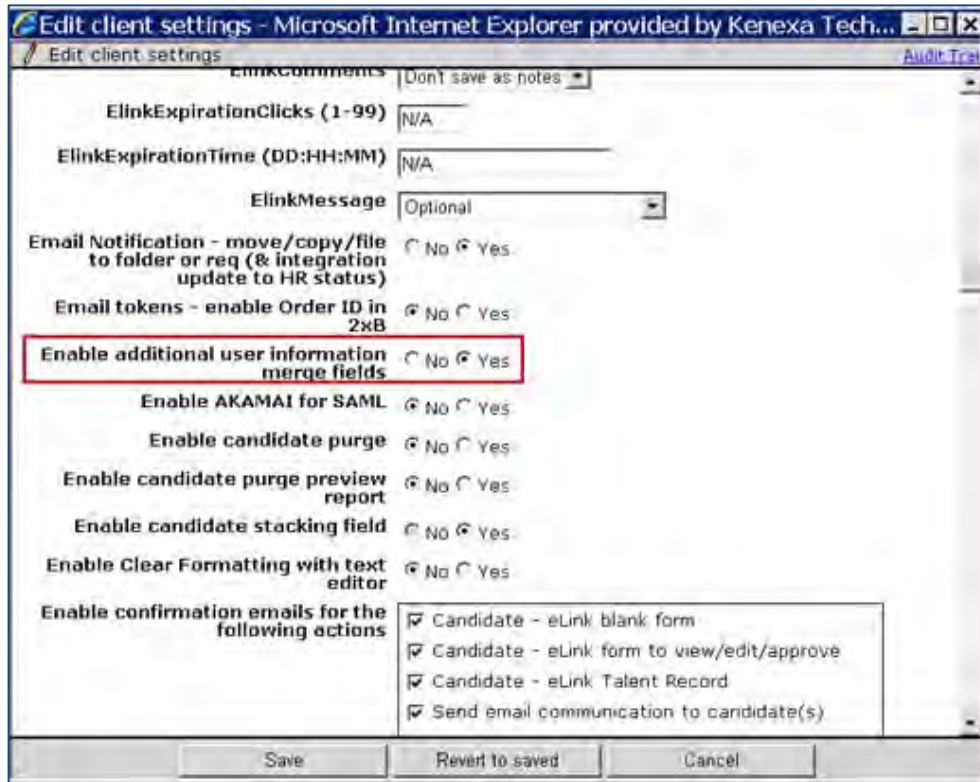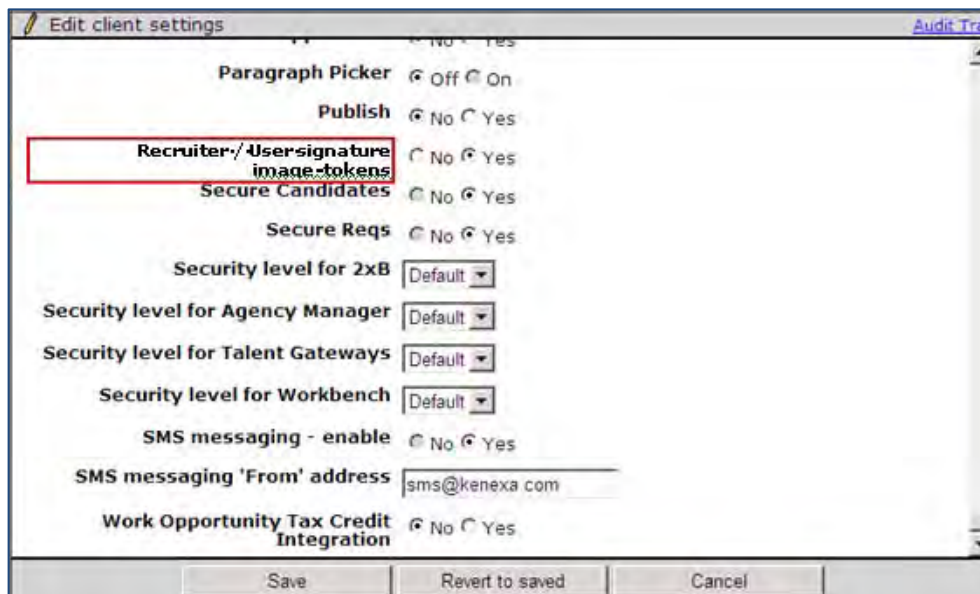All relationship view searches return related communication entities as hyperlinks, allowing users to access and view individual communication entities simultaneously, reducing the need for manual spreadsheets. Relationship views can be exported to Excel (.xls and .xlsx) or comma separated values (.csv) formats.

Product **LDP 064 Rel 13.0**	þ 2x BrassRing	þ Workbench Self-Service
Visible Changes	þ Yes – details in *Visible Changes* document sent for each release build.	
How do I get this feature?	þ Configuration required – contact your Kenexa Support Team for implementation details.	

Feature Description

This feature introduces a management relationship view between templates, blurbs, merge fields and single and multiple conditions. Template administrators can use text string searches (non-filtered) within communication entities or select (pre-defined) an existing communication entity and view all of its relationship instances. Text string searches look in the names of communication entities names.

> Note: This feature searches in document template names, e-mail template names, blurb names, merge field names, and condition strings when doing a text string search. It does not search the plain text content of templates and blurbs due to performance impact. This feature does not include editing capability.

All relationship searches return related communication entities as hyperlinks, allowing users to access and view individual entities simultaneously via pop-up windows, reducing the need for manual spreadsheets. All relationship views can be exported to Excel (.xls and .xlsx) or comma separated values (.csv) formats.
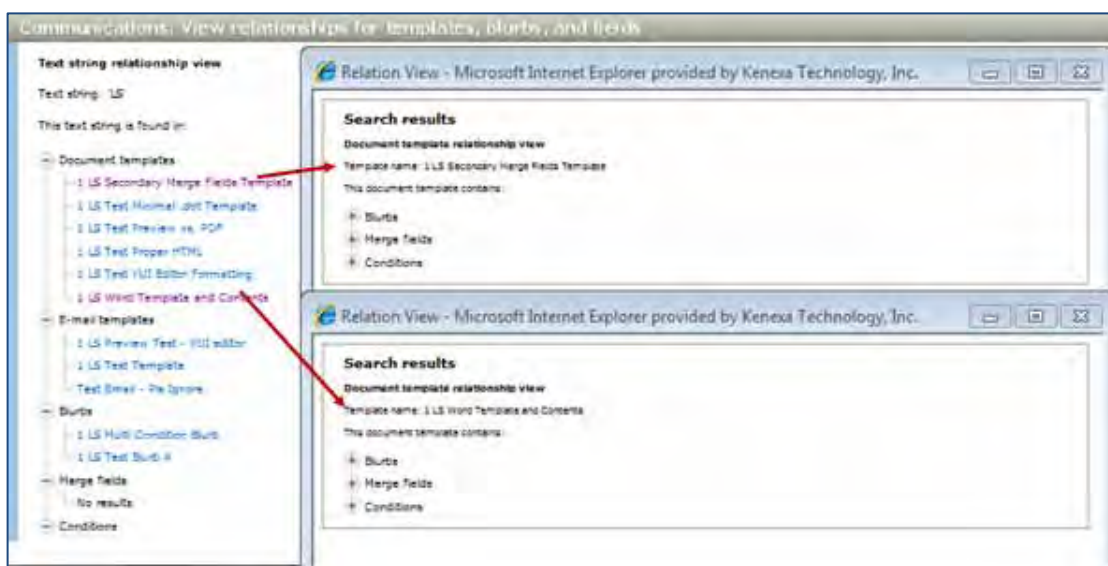
If there are no search results for a particular category, a No Results message displays for that category as shown in the following screenshot. This feature allows 2xB users to access the impact of changes before actually making changes.

```
☐ Merge fields
        [#RelocationForm:US_TXReimbursement#]
        [#RequisitionCus:US_TXFormField#]

☐ Conditions
        No results
```

View Relationship Search Types

There are two relationship view search types. In non-filtered searches, 2xB users perform text string searches to locate where particular text strings reside. In pre-filtered searches, 2xB users specify an existing communication entity and search for all instances of its relationships. For both type of searches, the relationship view search results display a tree view of all related communication entities as hyperlinks. Clicking these hyperlinks, users can open individual communication entities in pop-up windows.

When a 2xB user has the user privilege for view relationships enabled, the View Relationship option displays on the Admin > Communication menu.

Clicking the View Relationship displays the Communications: View screen where 2xB users define searches.

This table describes the Communications: View Screen.

Screen Area	Description
Text String Search (Non-filtered)	Enter text string searches in this text box. Text string searches: • can contain alphanumeric characters (including most special characters) • can be up to 150 characters long • cannot contain HTML tags.
Go/Clear	Click Go to perform search. Click Clear to clear text string or selection.

| Screen Area	Description
Search Within	Select communication entities to search
Pre-filtered Search	Select one communication entity to view its relationships to other communication entities
Export to Excel	Export views to Excel (.xls and .xlsx) or comma separated values (.csv) formats.
Search Results Panel	All search results display in this panel.

Exporting Relationship Views

All relationship views can be exported to Excel. The relationship view in Excel delineates the search type and parameters and lists all associated relationships.

1. Click **Export Search Results to Excel** on the Search Results screen.
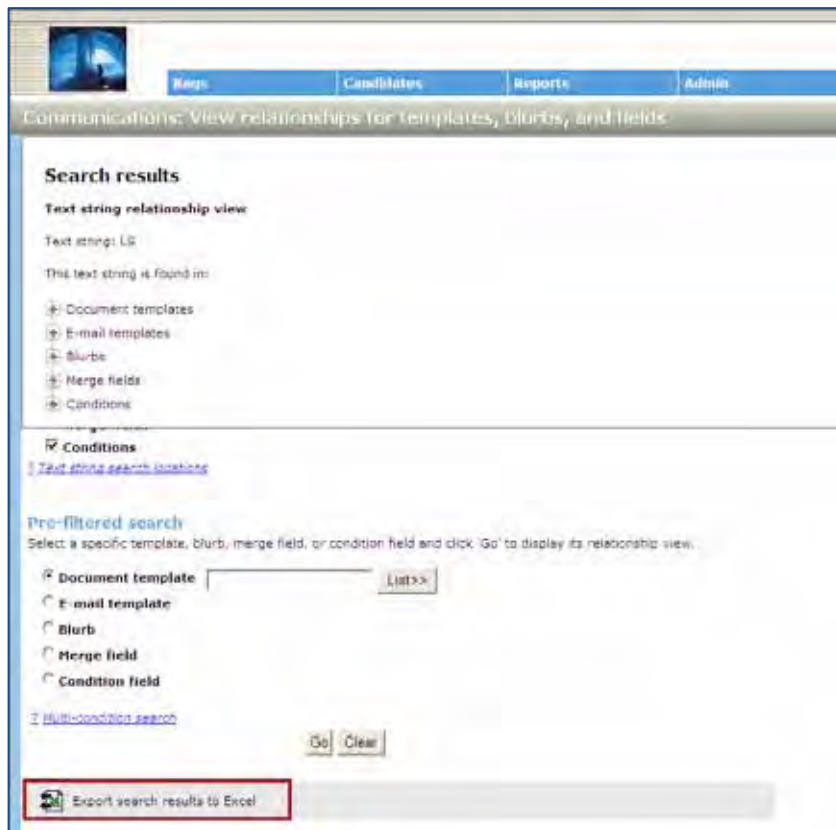
2. Click **Open**.
   The Excel spreadsheet opens.
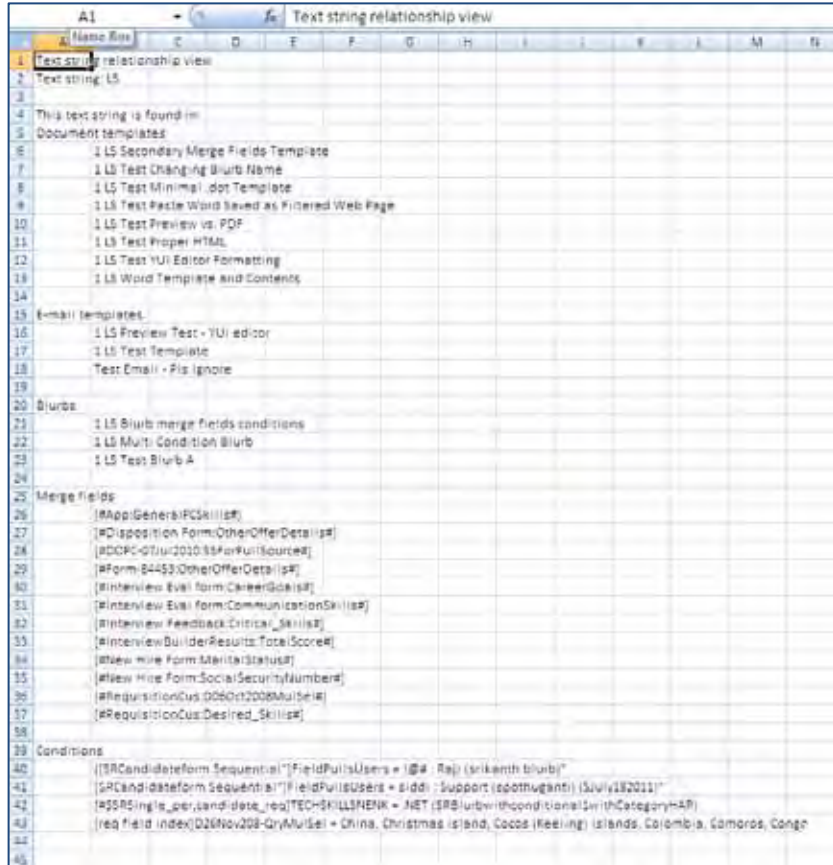
3. Click **Save** and select save format type.

Non-filtered search

Non-filtered searches search for text strings in one or all communication entity types.

1. **Admin > Communications > View relationships**.
   The Communications View relationship screen displays.
2. Define the following search criteria:

   - Enter text string search in text box. Use Clear to clear the text box if necessary.

   - Select communication entities using the checkbox. You can select one, all, or any combination of communication entities. Uncheck the checkbox to deselect.

3. Click **Go**.
   Search results display in a collapsed tree format. Click **+** to expand.
   Each search result is a hyperlink you can select to view an additional relationship level.
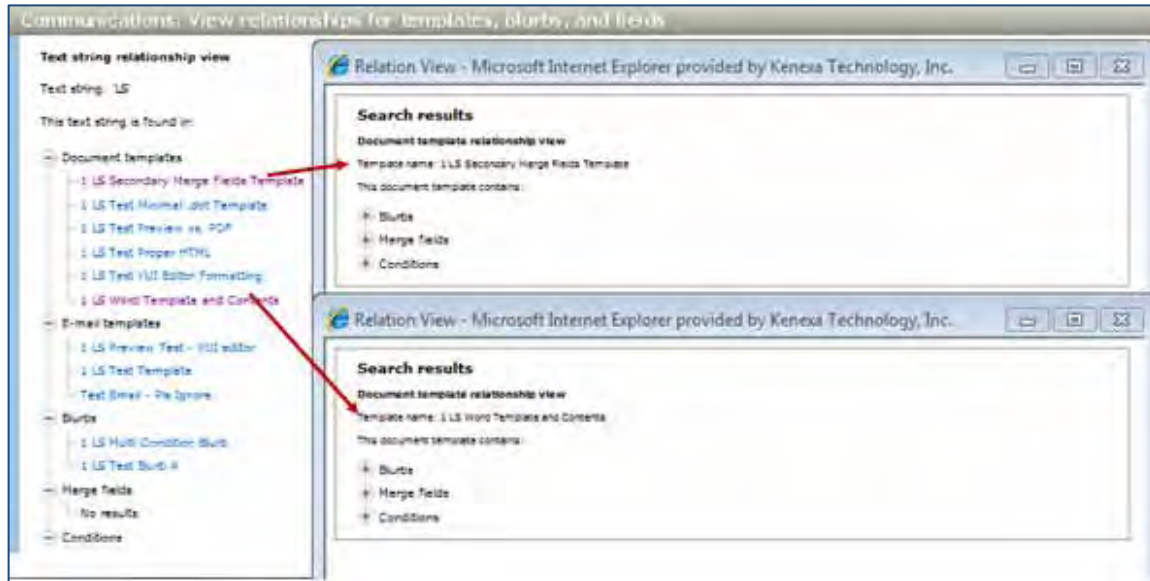
4. Click **Close**.

Pre-filtered Search

Pre-filtered search functionality can search for a relationship view of:

- All instances of a specifically defined communication entity
- Where merge fields reside in communication entities
- Where conditions exist within communication entities

Pre-filtered Searches (Document and email templates, and blurbs)

For document templates, email templates, and blurbs in pre-filtered searches, users select a particular communication entity and search for a relationship view of all instances of that entity.

1. **Admin > Communications > View relationships**.
   The Communications View relationship screen displays.
2. Select communication entity type using radio button.
3. Select **List** in the Pre-filtered Search area.
   The Search form populates with names for that particular communication entity type.
4. Double-click the name of communication entity type to select it and click **Ok**.
5. Click **Go**.
   Search results display in a collapsed tree format. Click on the **+** sign to expand.

6. Click the hyperlink in the search results to display the corresponding communication entity. You can click multiple hyperlinks to view all relationships simultaneously.
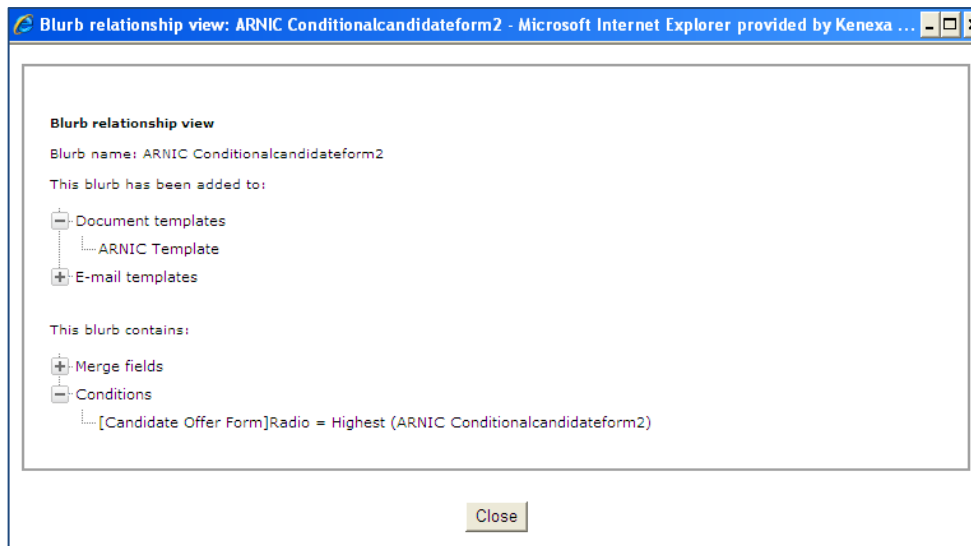
7. Click **Close**.

Pre-filtered Searches (Merge Fields)

To search for merge fields, 2xB users first select a variable group and then select an associated merge field. Only one merge field can be selected at a time.

1. **Admin > Communications > View relationships**.
   The Communications View relationship screen displays.
2. Select radio button next to merge fields.
   The merge field dialog box displays.

3. Select a Variable Group from the drop-down list box to populate Select Merge Fields.
4. Click on a merge field to select it.
5. Click **Go**.
   Search results display in a collapsed tree format. Click on the **+** sign to expand.

6. Click the hyperlink in the search results to display the corresponding communication entity. You can click multiple hyperlinks to view all relationships simultaneously.

Pre-filtered Searches (Conditions – Single)

To search for single conditions, 2xB users first select the condition field, the form field, and then the field options for each condition.

1. **Admin > Communications > View relationships**.
   The Communications View relationship screen displays.

2. Select radio button next to condition field.
   The condition field dialog box displays.

3. Select a form/field from the drop-down list box to populate Select field option(s).
4. Click on a field option to select it.
5. Click **Go**.
   Search results display in a collapsed tree format. Click on the **+** sign to expand.

6. Click the hyperlink in the search results to display the corresponding communication entity. You can click multiple hyperlinks to view all relationships simultaneously.

Pre-filtered Searches (Conditions – Multiple)

2xB users can search for up to five multiple conditions, joining them with AND or OR operators and grouping them with parentheses.

1. Navigate to the 'View document template' or 'View blurb' page for the document template or blurb that contains the multi-condition for which you want to retrieve the relationship view.
2. Select a document or blurb and click the binoculars icon.
3. Scroll down to the 'Condition statement' section.

4. Select the actual Condition statement (part or whole, depending on how precise you want to be).
5. Type the keyboard combination **CTRL-C** OR right-click the mouse and click 'Copy' in the pop-up window to copy the selection statement into the clipboard.
6. Launch the 'View relationships' page:

   - Paste the contents of the clipboard into the 'Text string search' text box, select an AND or OR operator and group conditions using parentheses.

   - Check checkbox to select communication entities. You can select one, all, or any combination of communication entities.

7. Click **Go**.
   Search results display in a collapsed tree format. Click **+** to expand.
   Each search result is a hyperlink you can select to view an additional relationship level.

Clicking on the hyperlink in the search results displays the corresponding communication entity. You can click multiple search hyperlinks simultaneously to view the next relationship level.

Limitations and Known Issues

This feature searches in the names of document templates, e-mail template names, blurb and merge fields and does not search the plain text content of templates and blurbs due to performance impact. This feature does not allow users to edit content when viewing relationships. Users must edit content using existing Communication Module functionality.

How Do Clients Get this Feature?

This feature is controlled by three new client settings and one new user type privilege. If clients intend to use the Pre-filtered Searches (Conditions – Multiple) feature, the Enable multiple conditions and blurbs and Enable pre-filtered document templates client settings must be enabled. If clients intend to use the Pre-filtered Searches (Merge Fields) feature, the Date field format options – email and document templates and the Enable additional user information merge fields client settings must be enabled. Please contact your Kenexa Support Team for more information about enabling client settings.

Workbench Self Service (WBSS) users can configure the new user type privilege. Please contact your Kenexa Support Team or Certified Workbench User for more information.

Workbench Self-Service Certified Users

Enabling this user privilege to access the "View relationships" option on the Admin > Communications menu.

In WB:

1. **Tools > Users > User Types.**
   The User Type screen displays.
2. Click the **Edit type permissions** icon.
   The Set Name and Function dialog box displays.
3. Click the **Set Privileges** icon for Communications.
   The Communication module displays.
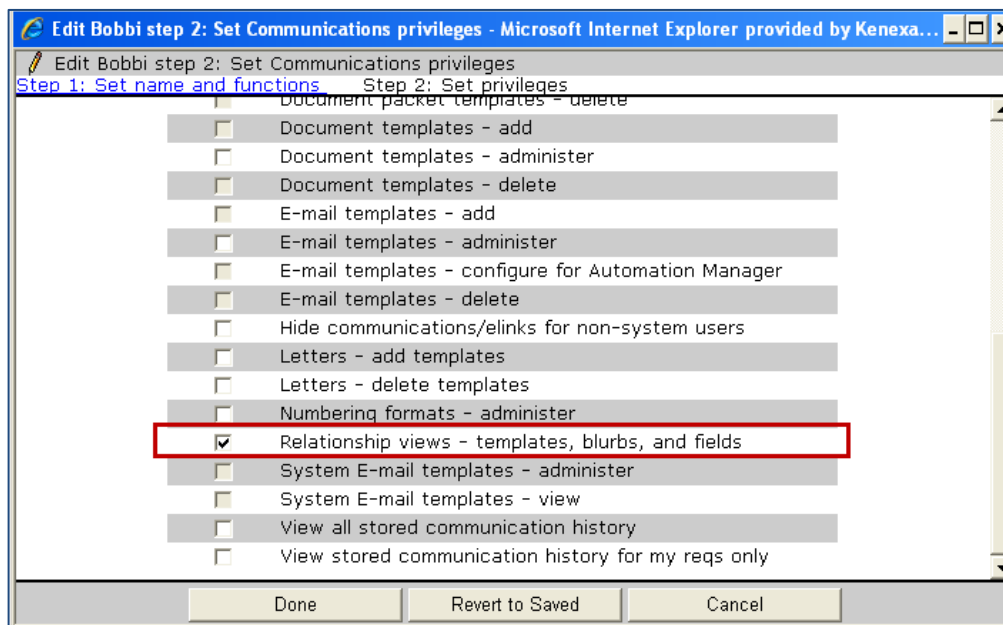
4. Select the checkbox next to **Relationship views – templates, blurbs, and fields.**
5. Click **Done**.
6. Click Save.

Kenexa Tasks

In order to perform multi-condition search, users must configure two client settings.

- Enable multiple conditions on blurbs
- Enable pre-filtered document templates

Workbench

In WB:

1. **Admin > Manage Clients > Edit Client Settings**.
   The Edit Client settings dialog box displays.
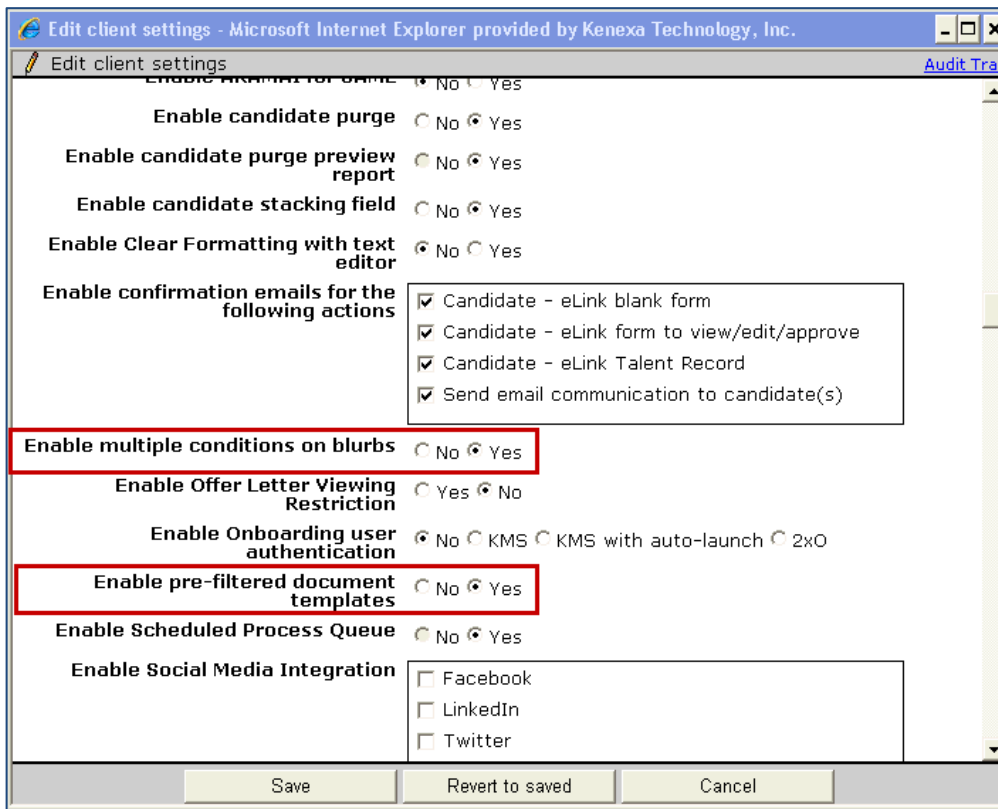
2. Select the **Yes** radio button for:

   - **Enable multiple conditions and blurbs**

   - **Enable pre-filtered document templates**

3. Click **Save**.

Optional Restricted Client Settings

In order to perform Pre-filtered Searches (Merge Fields), users must configure two client settings:

- Date field format options – email and document templates
- Enable additional user information merge fields

In WB:

1. **Admin > Manage Clients > Edit Client Settings**.
   The Edit Client settings dialog box displays.

2. Select the **Yes** radio button for:

   - **Date field format options – email and document templates**

- **Enable additional user information merge fields.**

3. Click **Save**.

Communications – Send Candidate Ad-hoc SMS Message

This feature allows 2xB users to send Short Message Service (SMS) text messages to one or multiple candidates from Req and Working folders, the Inbox, Talent Records, and the Candidate Results panel. SMS messaging data for sent messages is stored in the candidate's Talent Record and an active link to the SMS message text displays in the Talent Record. This feature is functional in Classic and New UI.

Product LDP068 Rel 13.0	⌐þ 2x BrassRing	þ Workbench Self-Service
Visible Changes	þ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	þ Configuration required – contact your Kenexa Support Team for implementation details.	

Feature Description

The Send Candidate Ad-hoc SMS Message feature allows 2xB users to send ad-hoc text messages to candidates using a mobile phone number listed in "Other phone" field in a candidate's profile. Ad-hoc SMS messages can be sent from Req and Working folders, Talent Records, and the Candidate Results panel. Once enabled, a record of each SMS message including transmittal date and message text can be stored in the communication tab of the candidate's Talent Record (classic and New UI).

Supporting Infrastructure for SMS Messaging

Clients must work with the Kenexa Support Team to ensure the supporting communication infrastructure is fully configured and operational.

1. As part of workflow, client must obtain completed candidate consent form to receive text messages. This capability is not yet supported in 2x BrassRing and Talent Gateways.
2. Clients must capture the mobile phone numbers of candidates in the Other phone field of the candidate profile. Usually candidates enter this information themselves when creating or updating Talent Gateway accounts, but 2xB users can create and update candidate profiles as well. (Note that entering the mobile number does not constitute consent to receive SMS messages.)
3. Client must procure an SMS message vendor and messaging plan.
4. Kenexa Engineering must complete configuration and testing of communication between the client's SMS messaging vendor and Kenexa's SMPP server. There is a one time fee for this service. Please contact your Kenexa Support Representative for more information.
5. WBSS users must enable **Candidate – Send candidate ad-hoc SMS message** User Type privileges for 2xB users.

2xB User Experience

Once client settings and 2xB SMS user privileges are configured, 2xB users can send candidate SMS text messages from the Classic or New UI and store historical data for each SMS message sent.

1. Select one or multiple candidates from:

- Req or working folders
- Candidate's Talent Record
- Candidate Results panel

2. Click the **Send candidate ad-hoc SMS message** action. Location of the Communication > Action options vary for each interface.

From New UI Candidate Results
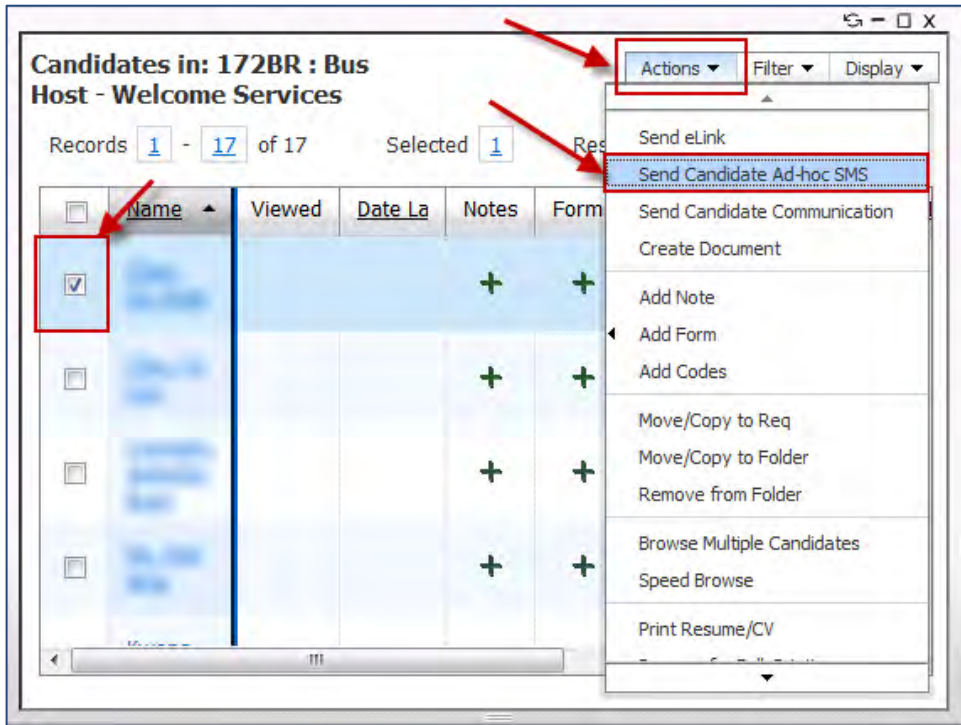
From Classic UI Req Folder

The Candidate SMS dialog box displays with the **To** and **From** fields (static) auto-filled.
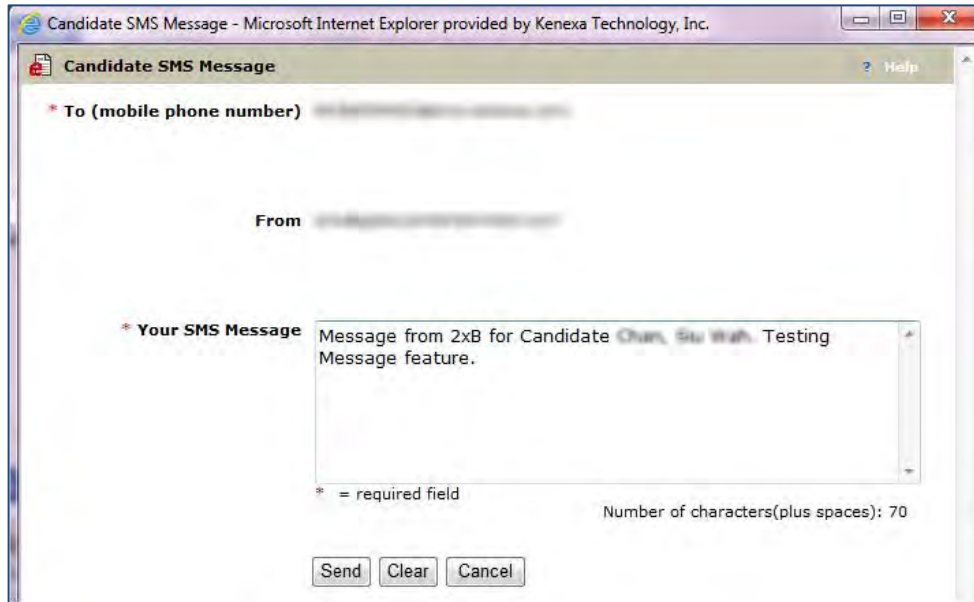
Complete the **Your SMS message** field: SMS default message length is 140/160 characters. If a message exceeds the character length, it is sent in separate messages until the entire message has been sent.

3. Click **Send**.
   The SMS message confirmation displays.

If the Client setting "Communications history stored" is set to yes, the SMS messages details, transmittal date, and message text are stored in the Communications tab of the candidate's Talent Record. An active link to the text of the SMS Message displays in the Talent Record in both Classic and New UI views.

Talent Record (Classic UI)

The first *n* characters of SMS message form the title of the message listed in the Communications column.

When 'Communication history stored' = Yes, the title of the SMS is a clickable link that opens a pop-up window.

When 'Communication history stored' = No, the title of the SMS is static text.

Talent Record (New UI)

Best Practice Recommendations

Clients can enforce a best practice business rule of collecting the *mobile* phone number in the **Other phone** field when creating candidate profiles.

Limitations and Known Issues

- 2x BrassRing and Talent Gateways do not yet capture candidate preference and consent for SMS messages as a notification modality.
- 2xB user cannot, at this time, receive message delivery failure notifications.
- Candidates cannot reply to a received SMS messages.
- Adding SMS message templates configuration to e-mail templates is not presently available.

How Do Clients Get this Feature?

This feature is controlled by two new client settings, a new user type privilege, and a new panel configuration. Please contact your Kenexa Support Team or Certified Workbench User for more information.

Workbench Self-Service Certified Users

WBSS users must add a new user privilege and enable a new panel configuration to allow 2xB users to access the Send Candidate Ad-hoc Message action.

User Privilege

1. **Tools > Users > User Types.> Edit type permissions > Candidate Actions 2**.
   The Set name and functions screen displays.
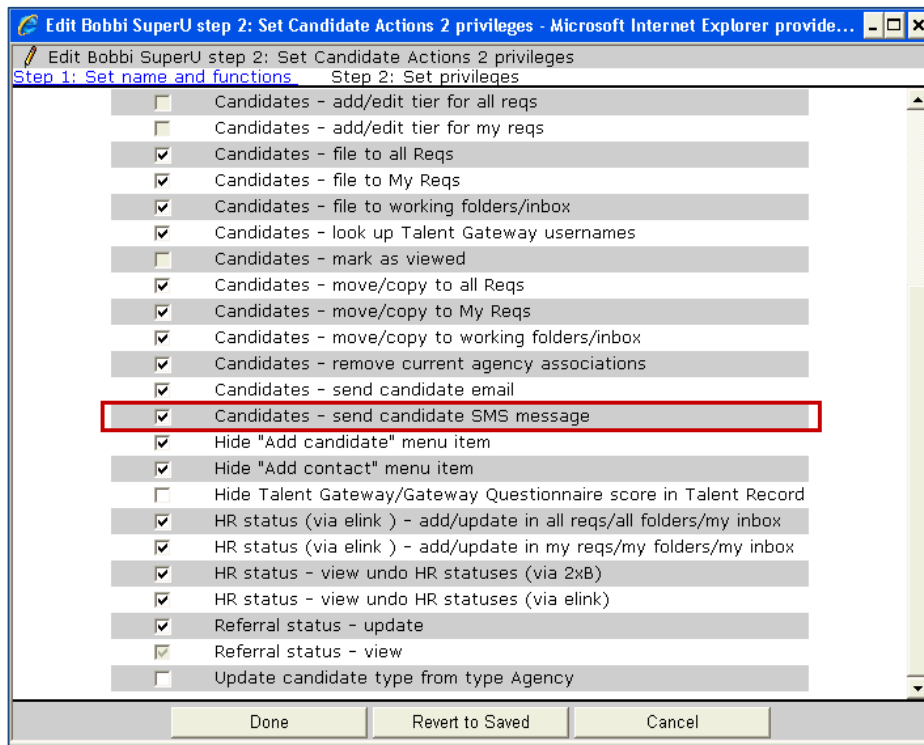
2. Select the checkbox for **Candidate – Send candidate ad-hoc SMS message.**
3. Click **Done**.
4. Click **Save**.

Custom SubPanel Configuration – Candidate Actions

1. **Tools > Settings > Panel Configuration > Administer Configuration.**
2. Select the Administer icon of the Custom SubPanel.
3. Select the **Edit** icon for a configuration with type Custom Candidate Results.
   The Edit Panel configuration dialog box displays.
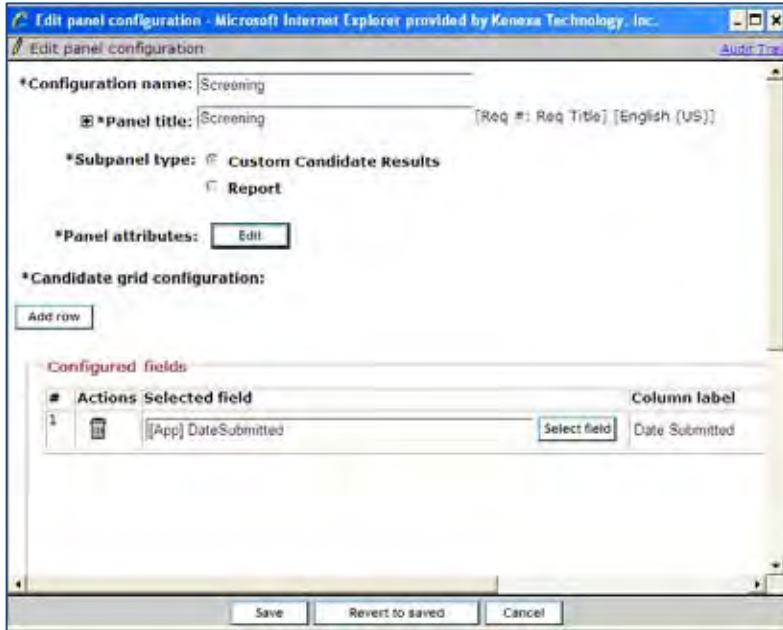
4. Select **Edit** beside Panel attributes.
   The Panel Attributes dialog box displays. Expand the Candidate Actions section.
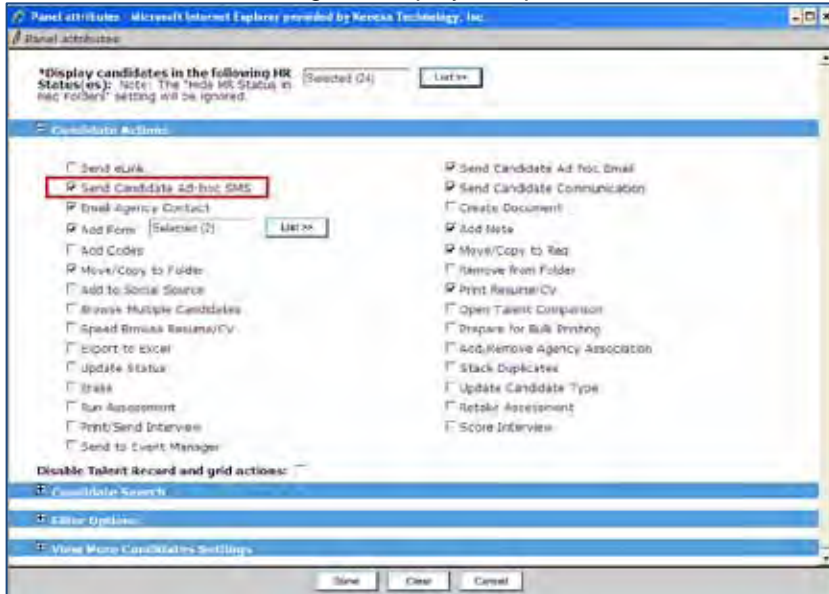
5. Check/uncheck **Send Candidate Ad-hoc SMS.**
6. Click **Done**.
7. Click **Save**.
8. Click **Close**.
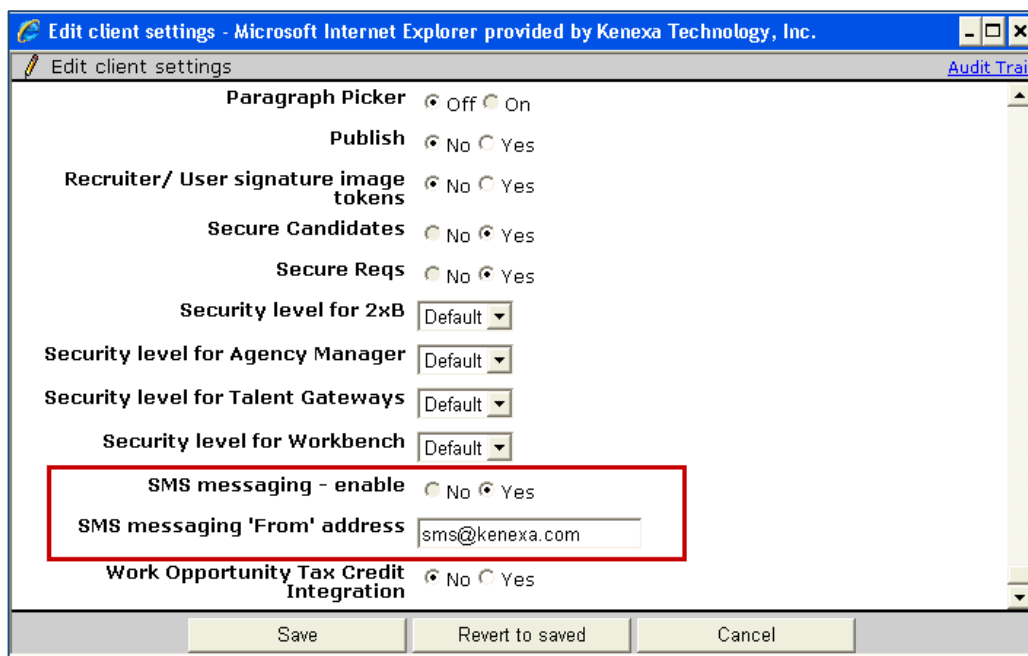
Kenexa Tasks

When the entire supporting communication infrastructure is fully configured and operational, the Kenexa Support Team enables the client settings. Client settings enable the SMS Message feature ability, the SMS message From auto-fill field, and the SMS message communications history (Communications history stored).

> **Note**: When disabling this feature, the User Privilege for each user type *must* be disabled before the Client Setting can be set to No

Workbench

1. **Admin > Manage Clients > Edit Client Settings**.
   The Edit Client dialog box displays.

2. Select **Yes** radio button for **SMS messaging – enable**..

   Complete **SMS messaging 'From' address** in the text box.

3. (Optional). Select **Yes** radio button for **Communications history stored.**
4. Click **Save**.

Companion Products – Workbench Configuration

The configuration utility has changed from Navigator to Workbench for the following products: Remote Recruiter, SmartApproval, Event Manager, Community Gateway

Product	☑ Event Manager	☑ Remote Recruiter
LDP031 Rel 13.0	☑ Community Gateways	☑ SmartApproval

Feature Description

Navigator configuration of these companion products moved to Workbench (this is for Tech Services users and Super Users – no Wworkbench Self-Service clients have access).

The Companion Products are now available in Workbench under the "Tools" category.

Companion Products

> ➢ Remote Recruiter (formerly called Mobile Recruiter)

> ➢ SmartApproval

> ➢ Event Manager (No separate section)

> ➢ Community Gateway

- There will be no functionality changes to the Companion Products

- All client settings associated with the Companion Products still need to be enabled

Note that adding users for these products is now done via WB **> Tools > Users > Administer 2xB users**, and selecting **Configure users for Companion Products**.
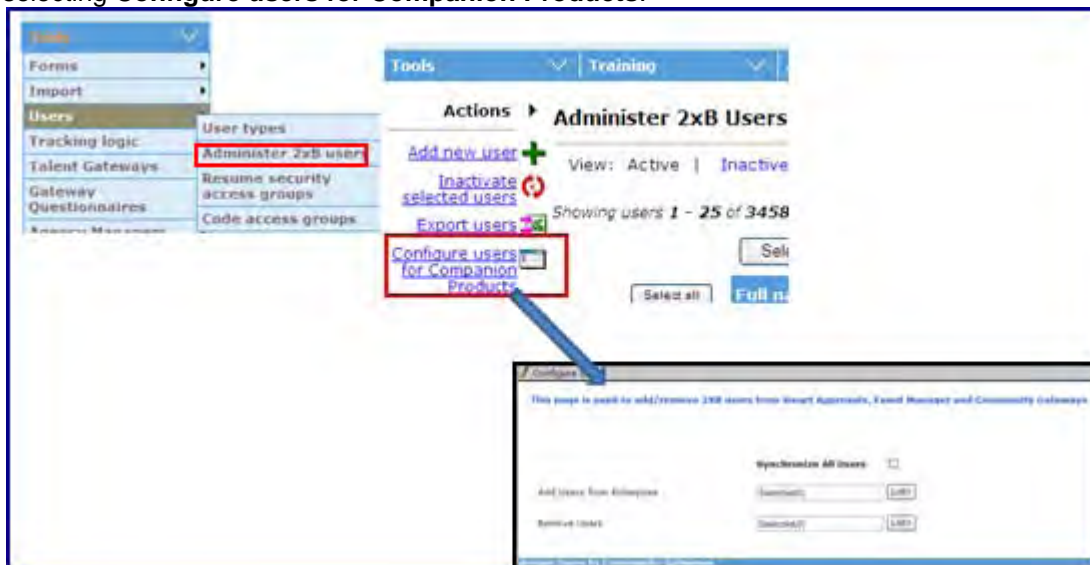
You also synchronize all users on this screen.

Remote Recruiter

To begin configuring, select **Tools > Remote Recruiter**.

Section One "Configurable Form Types" looks the same as in Navigator:

Set the options for:

- Allow users to download formtypes definitions
- Configurable FormTypes – Multi-select box
- Show 'Add Candidates'
- Enable JobFair Mode
- Logo for Printing

Section Two – Synchronization Notification Options is the same except for displaying search and list options differently. In Workbench for search type fields the user is given the following options:

- Search by name – Lastname, Firstname or Firstname, Lastname
- Search by criteria – a string that either starts with or contains with something the user adds to the text box.

Select the users and set the options for:

- Enable emailing to the entire req team
- Message sent to req team sent on synchronization
- Message to candidate sent on synchronization
- Uncheck this to hide Object Type column in sync notify email
- Type here the font family/name (eg. Arial) of the content in sync notify email
- Font size of the content in sync notify email – Single select box
- Time when send notifications – Hour and Minute – Single select boxes
- Job Fair Mode Confirmation Popup Text

Synchronization notification fields

- Select FormType – Single select box
- Show this field as Separate column in the email
- Add button

Section Three – Selecting Code Types looks the same.

Set the options for:

- Select the Code-Type for Remote Recruiters Source-Code - Single select box
- Select the Source-Code for Remote Recruiter – Single select box
- Select the Candidate-Type for Remote Recruiter – Single select box
- Select User Types for Remote Recruiter Bulk-Upload – Multi-Select box

Section Four – Advance Search Fields

Set the options to:

- Allow users to search all reqs – checkbox
- Add New Field - Hyperlink

SmartApproval

To begin configuring, select **Tools > Smart Approval.**

Select **Smart Approval Administration** to set up up the Smart Approval Workflow types by selecting a pre-defined workflow from the drop down list. (You can edit selected workflows by clicking the Edit icon for it.)

CODETYPE DEFINITIONS

Select **Smart Approval Settings** to define the **code type labels** that will display in the Smart Approval UI.

- First time configurations display three text boxes as enabled and the user can enter code type names
- Once saved, the three text boxes are displayed in the read-only mode, even if at least one code type setting that has a value defined.
- Values once saved cannot be edited or deleted.

SETTINGS SECTION

- This is where a user configures each Role Types, Role ID's (Role or position) and 2xB User Type permissions.
- The edit functionality would allow the user to change the form from a req type to a form type.

USER GROUP ASSOCIATION

- All the user groups configured for the client will be listed alphabetically here
- In the User selection list, all users added to Companion Products will be listed as available users.
- There are no rules around any of the selections, like minimum or maximum number of groups.

SYNCHRONIZE USERS AND CODES

This is where a user configures each code to map for each workflow type.

CODE SETTINGS

- Number of rows displayed is based on how many code types have been defined
- Max number of records will be 3.
- Code Index: Static numbering
- Code Type: Displays the names of code types defined during the Code type definition setup
- Default selection will be BLANK
- Values: Once values are selected they cannot be changed because of existing Smart Approval business rules.
- Form Field: Will list the 3 types of fields: Req Standard; Req Custom and Candidate form fields. (as shown below)
- Custom Label: Allows max of 100 characters; no HTML; NOT REQUIRED

TRIGGER SETTINGS

- FormType has 2 Radio options – Req and Candidate
- Form Name: Displays list of Candidate form names if form type selection = Candidate. Will be disabled otherwise
- Fall Back to Req: Will be enabled only if form type selection = Candidate. Will be disabled otherwise.
- Form Field: Will list the candidate form fields from the candidate form selected in FORM NAME.
- If fall back to req = YES, then this list will display Req Standard fields and Req Custom fields.
- Values: Have 2 options: text fieldand selection field.
- If the Form field selected is of type checkbox, multi-select, radio, or single-select, then the select field will be enabled and the list will display the options for the selected field.
- Once the Form field selected a value or a list of values can be entered using delimited by "`", up to 100 characters.

Please note: As a result of reworked UI we will be enforcing some validations.

- Code Type cannot be added to a workflow and code type cannot be edited once Code Settings have been saved.
- Trigger settings must be saved with Code Settings. If Trigger settings does not exist for a workflow default values will be loaded for trigger setting in the UI.

SYNCHRONIZE CODES:

Code Settings and Trigger Setting - Selected List –Search for Form Fields Page
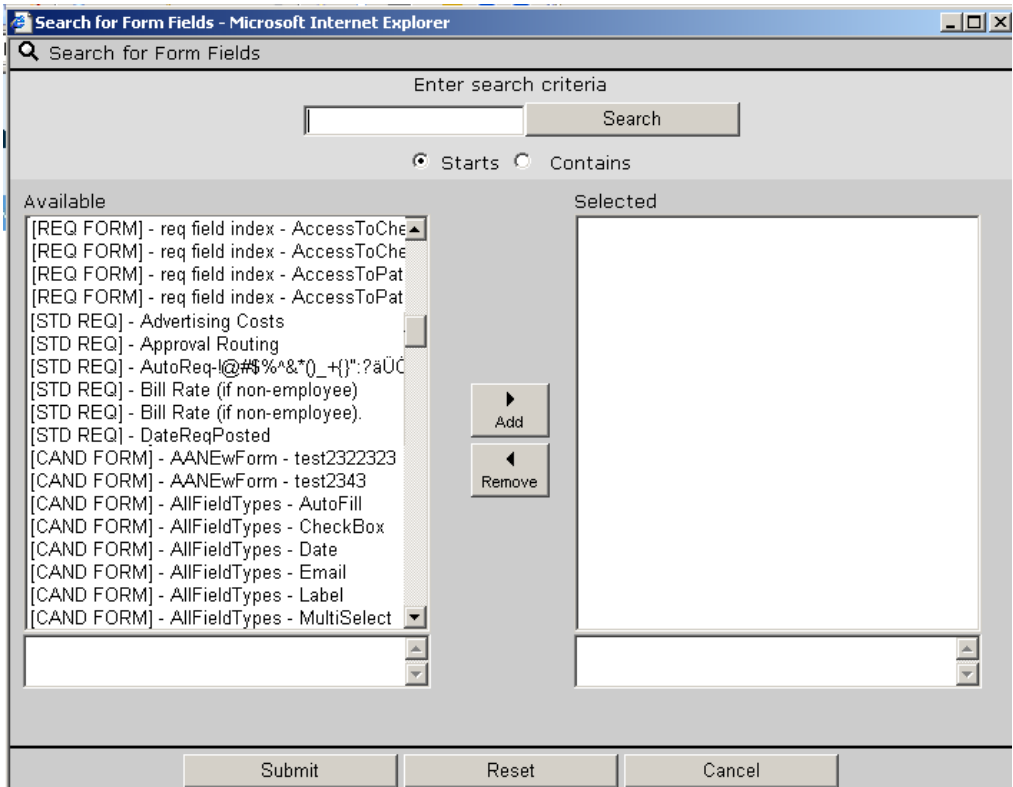
Community Gateway

To begin configuring, select **Tools > Community Gateway > Configure Sites**.

Administer Clients, Sites and Users
Use this page to configure existing clients of the PostingPlatform solution. You can configure multiple sites for a given client and jobboard. This allows you to map different fields from a clients Enterprise system to a given job board. You also assign or remove users from sites via this page.

Configured Clients: demo-intl

Configured Sites: CareerBuilder

Create New Site

Modify Existing Site

Site Name: CareerBuilder

Posting Board: CareerBuilder

Source Codes: sc2 - Source code 2 RDP

Basic TG Site: Add candidate

Full TG Site: 1 LS FTG

Automatic Posting Removal: ○No ⦿Yes

Resume DB Expiration Date: 10/20/2010

Resume DB Source Code: sc2 - Source code 2 RDP

Board UserName: RDBwsTest@careerbuilder.com

Board Password: cbwst3st

Board Key 1:

Board Key 2:

Board Key 3:

Board Key 4:

Board Key 5: ^WaF6P2RQervUQfVNF1k

TDC MailBox:

Apply URL: http://stagingjobs.brassring.com/1033/AS

Enable Inventory (Applicable only for Monster) : ☐

Delete from Both Monster and Diversity boards : ⦿No ○Yes
Changing the default setting will not delete the job posting from Monster's Boards

Current Mappings

[Update Site]

[Delete Site]

[Cancel]

After you select There is no change to this pagethe client and the job board site to configure, the site page displays.

Configuration of clients and job boards remains the same as it is today.

Current Mapping URL when clicked will display the same configuration window as it did before.

POSTING BOARDS

To "Add new Posting Board" or to edit an existing Posting Board on the Configure Job Boards page, select **Tools > Community Gateway > Posting Destinations**. There is no change to the functionality on this page, where you can configure a specific job board for a client. Edit an existing job board by selecting the "Edit" link.

Configured Job Boards

Add new Posting Board

Edit	Post. dest. id	Description	Test username	Test password
Edit	24	Monster	test	test
Edit	1	CareerBuilder		
Edit	31	031		
Edit	311	311		

Both Add and Edit Posting Board pages look the same and function the same as they did in Navigator. Under "Configured Fields" section of the "Posting Board" page you can click on the "Add new schema element" link to go to the "Edit Board Field" page, where you can add job board elements to their posting destination site.
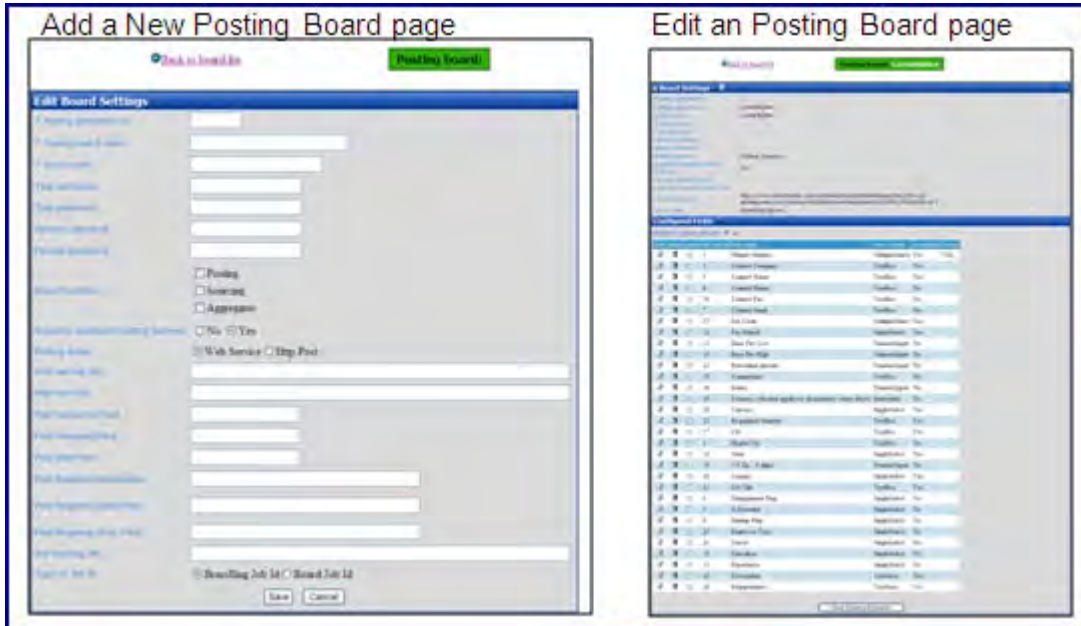
USERS

To assign users, use **Tools > Users > Administer 2xB users** > **Configure users for Companion Products.**
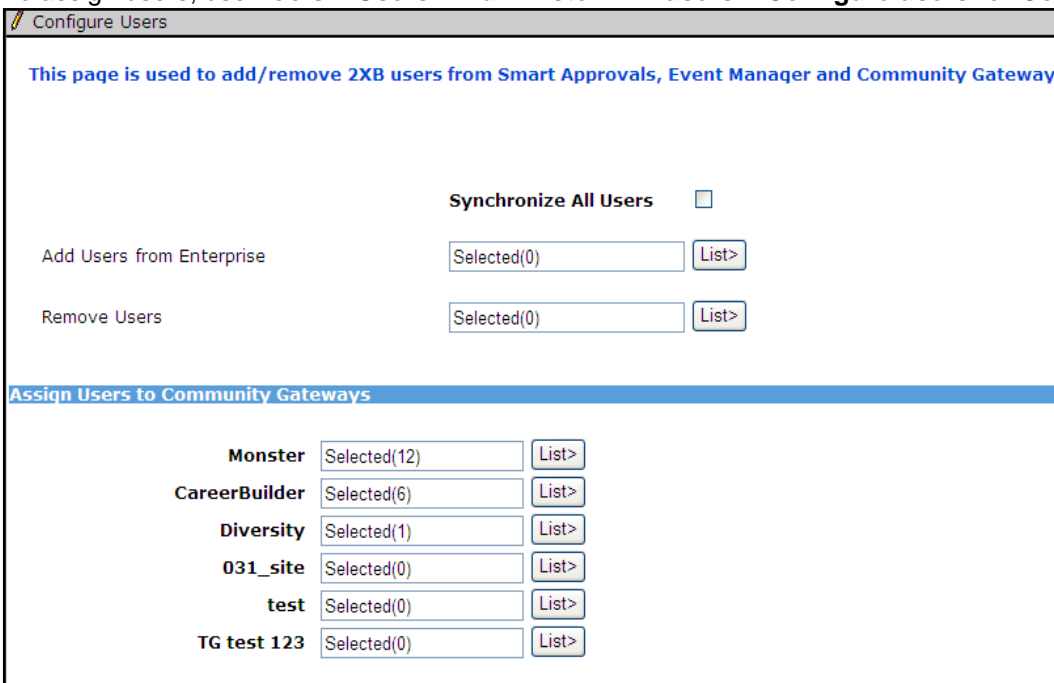
Complete both sections, adding users and assigning them to posting boards.

Event Manager

There is no menu option for Event Manager in Workbench; steps to set up Event Manager are the same.

Companion Products – Workbench Configuration | 9

- You still need to create a ticket in Onyx requesting the Engineering Team to configure the Event Manager Site for your client.
- Client Settings -Event Manager URL is obtained from Engineering.

Then use existing Workbench Configurations steps:

USERS

To add or edit Event Manager users, use **Tools > Users > Administer 2xB users** > **Configure users for Companion Products**.

Custom Help Links

Custom Help Links feature allows 2xB users to access their customized help content from within the 2xB application. When configured, Custom Help Links displays a My Help link in the 2xB application that launches an intermediate My Help pop-up window linking 2xB users to their customized help content. This feature allows 2xB users to use their own internal customized help content and the 2xB application help simultaneously. An example of customized help content could be company specific training modules or procedures.

Custom Help Links are configured for user-types and because 2xB recognizes language and locale from user type profiles, specific custom help links can be configured for each user-type and in different languages.

Product LDP 055	☑ 2x BrassRing ☑ Workbench Self-Service
Visible Changes	☑ No – requires specific conditions / configuration for visibility.
How do I get this feature?	☑ Configuration required – contact your Kenexa Support Team for implementation details.

Feature Description

The Custom Help Links feature includes the configuration of a My Help link and links that display in the My Help pop-up window. When configured, a My Help link graphic displays next to Help in the 2xB application. Clicking My Help opens a My Help pop-up window containing links to the customized help content. Configuration of the custom help links in the My Help pop-up window establishes the relationship between My Help and the individualized customized help content.

When users log into the 2xB application, Custom Help also recognizes the user's privilege level and assigns privilege-level configuration information. For example, if a 2xB administrator wanted only Admin users to have access to specific configuration details, they could set the Admin privileges and only allow the Admin user type to view those configuration details. User type permissions can also be used to restrict visibility of customized help links in the My Help pop-up window. If customized help link permissions are not set for a user type, when that user clicks the My Help link a message displays stating that no custom help is configured.

2xB user type profiles associate the user types with a user's native language and locale and displays the My Help link in that user's language. Links to customized help content in the My Help pop-up window can also be configured to display in a user's native language. For example, if a French user were using custom help links, they would see "Mon Aide" in their 2xB application and the links in the My Help pop-up window would also display in French.

Custom Help Links configuration is available in both 2xB Classic UI and 2xB New UI.

Client Responsibilities

- Clients must supply the content that describes the logical task flow in the My Help pop-up window.
- Clients are responsible for the hosting site of their customized help content.
- Clients determine how many different types of 'user assistance' sites and user type permissions for each piece of the customized content.

How Custom Help Works

When custom help is configured for a user type, 2xB recognizes the user type and their custom help privileges when they log into 2xB. If user type configuration includes custom help, the My Help graphic displays in the 2xB application. Clicking the My Help link opens a My Help pop-up window containing links to customized help content, hosted on the client's site.
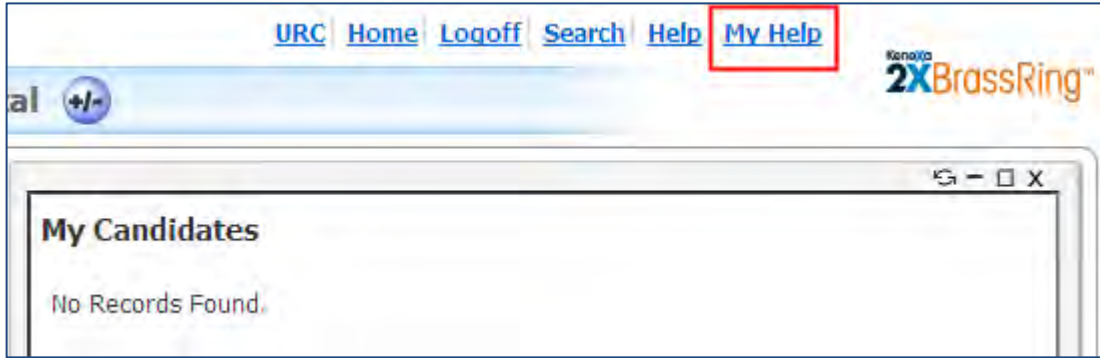
Clicking a link in the My Help pop-up window, directs the user to the customized help content on the client's site.
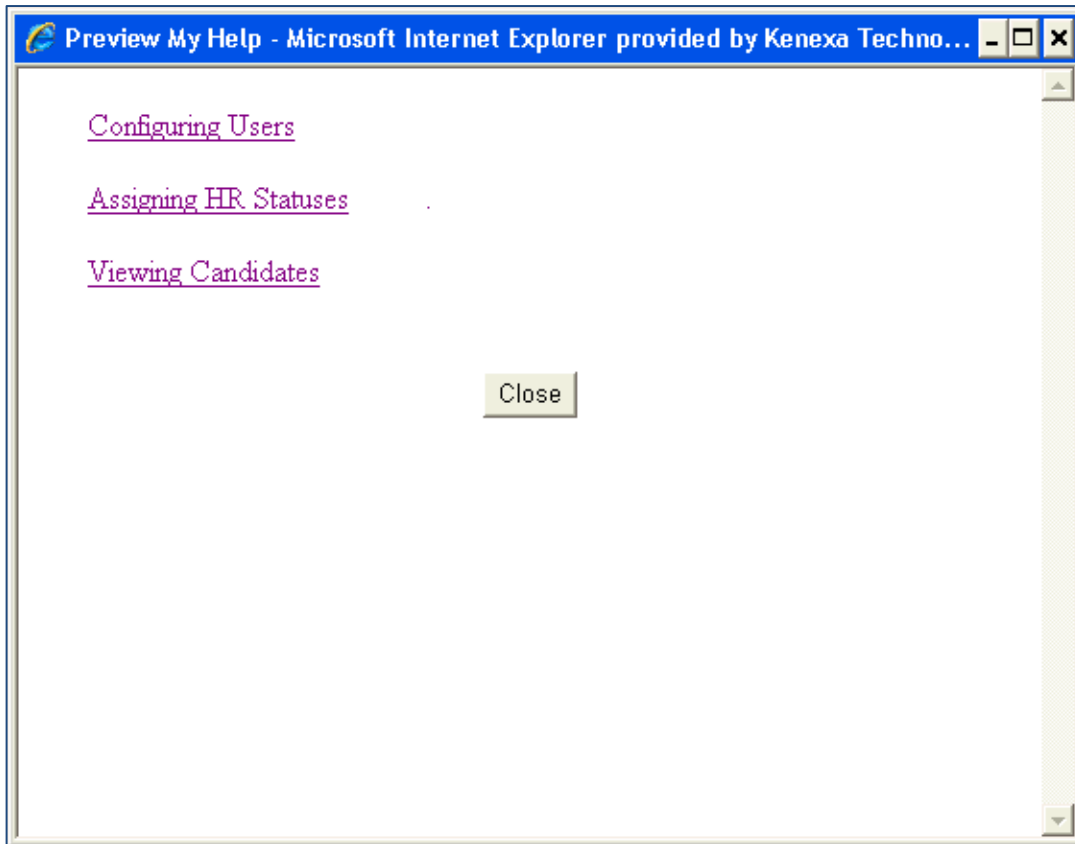
Limitations and Known Issues

Custom Help Links do not include the following functional areas:

- Talent Gateways
- Agency Managers
- Data Insight Tool
- Integration items such as Assessments, Onboarding, Interview Builder
- Companion Products such as SmartApproval and Event Manager

Note: As a workaround, client can add links to the 2xB 'My Help' page to externally hosted user support pages for the Data Insight Tool, Event Manager, SmartApproval, Onboarding, Assessments, Interview Builder (basically, anything that appears in any of the main menu items, and some Agency Manager functionality 2xB 'My Help' page(s).

How Do Clients Get this Feature?

This feature is controlled by a Workbench action for user type. Please contact your Kenexa Support Team for more information about enabling this feature.

Workbench Self-Service Certified Users

Workbench Self-Service Certified Users Level 1 and above can access and configure Custom Help Links for 2xB user types. In Custom Help Links user type permissions determine whether a user type can view and access My Help and what level of customized help content that user can access.

Custom Help requires that each user type configuration include access permission and pointers (links) written in valid HTML to their customized help content. It is the client's decision to determine which user types can access their internal customized help content.

> **Note:** Clients must supply the syntax for the links that appear in the My Help pop-up window. Clients are responsible for the hosting site of their customized help content.

HTML Guidelines

Use the following HTML guidelines when entering links to customized help content. Due to security requirements, we cannot provide the list of permitted HTML tags. However, most errors are due to the incorrect use of common HTML tags.

Here are some very general guidelines:

- HTML tags must be valid. For a tag to be valid, it means that the tag must be in the official list of tags supported by the W3C (Word Wide Web Consortium). To learn more about using HTML tags, see the W3 Schools website. This is an excellent resource.
- HTML tags must be well-formed. "Well-formed" means that tags must include an opening tag (for example, you use <p> to start a paragraph) and closing tag (you use </p> to close that paragraph). Both tags must be correctly formed with no additional characters and spaces within them. Here is an example of some simple tags:

  - HTML must not include any embedded HTML.
  - <p>This is the bold tag.</p>
  - <p>This is the <i>italic</i> tag. </p>
  - <h1>Heading Level 1</h1>
  - <h2>Heading Level 2</h2>
  - <h3>Heading Level 3</h3>

Configuring Custom Help Links

To configure custom Help links for user types:

1. In WB: **Tools > Users > User Types.**
   The User Type Administration Page displays:

2. Select a user type.
3. Click **Configure customer help** or click the Help icon**.**

   The Custom Configure Help screen displays. Default settings on the Configure Custom Help screen corresponds to the number of global sites the My Help Link supports. For example, if you are creating customized My Help instances in two languages, the languages will be listed to the right of the Enter Text text box.

   The Custom Configure Help screen is where you define the links that connect users to the customized help.

   - The following screens show two versions of the Custom Configure Help screen, one for English. and one for multiple languages.

Custom Help Links | 4

- The following screen shows a Custom Configure Help screen for multiple languages:

4. Enter the HTML links to your customized help content. The text defined here displays in the My Help pop-up window when a user clicks the My Help hyperlink. All text must be entered using valid HTML and links must be entered in the correct syntax. Hyperlink text that displays in the My Help pop-up window is customizable.

An example of a properly formatted HTML link follows. The target blank attribute causes the link to open in a new browser window.

Customized Help Link Text

If you are entering text for two languages, use valid HTML to enter the two URL links and the specific language for each link. For example, if you are entering link in French, the link text must be in French.

- Each text field has a maximum limit of 10,000 characters, including HTML tags. HTML must not include any embedded HTML.

- The following screen shows customized help links entered in valid HTML.
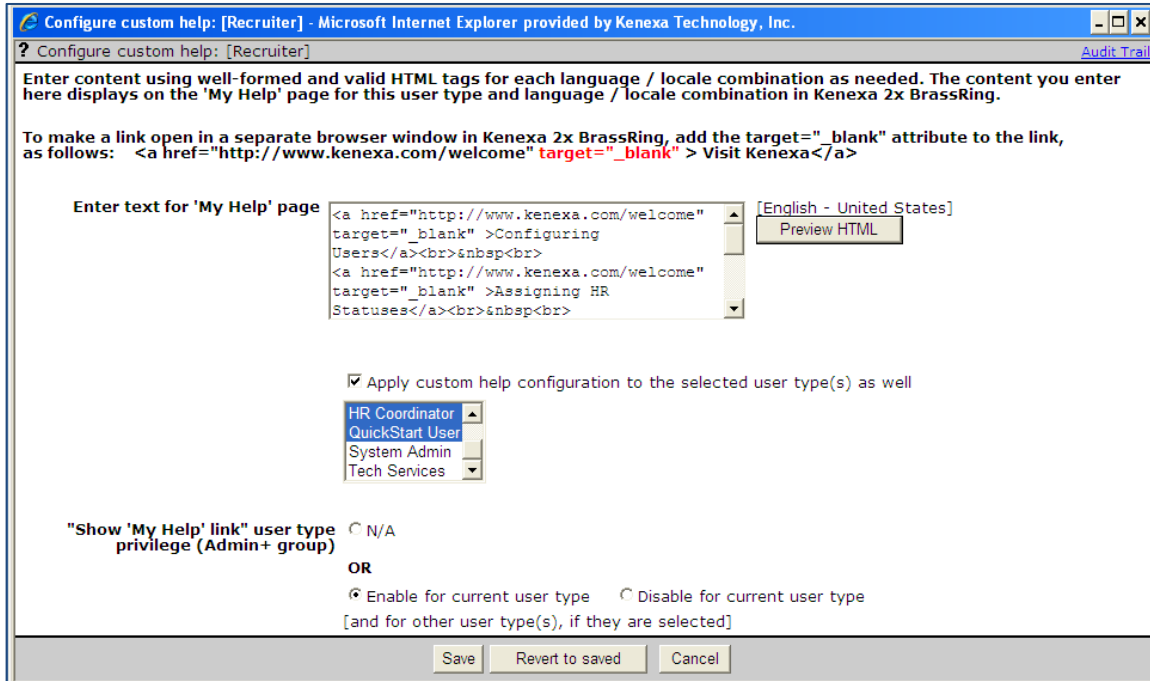
5. Click the Preview HTML button to preview the customized links that will display in the My Help pop-up window. Adjust HTML as necessary.
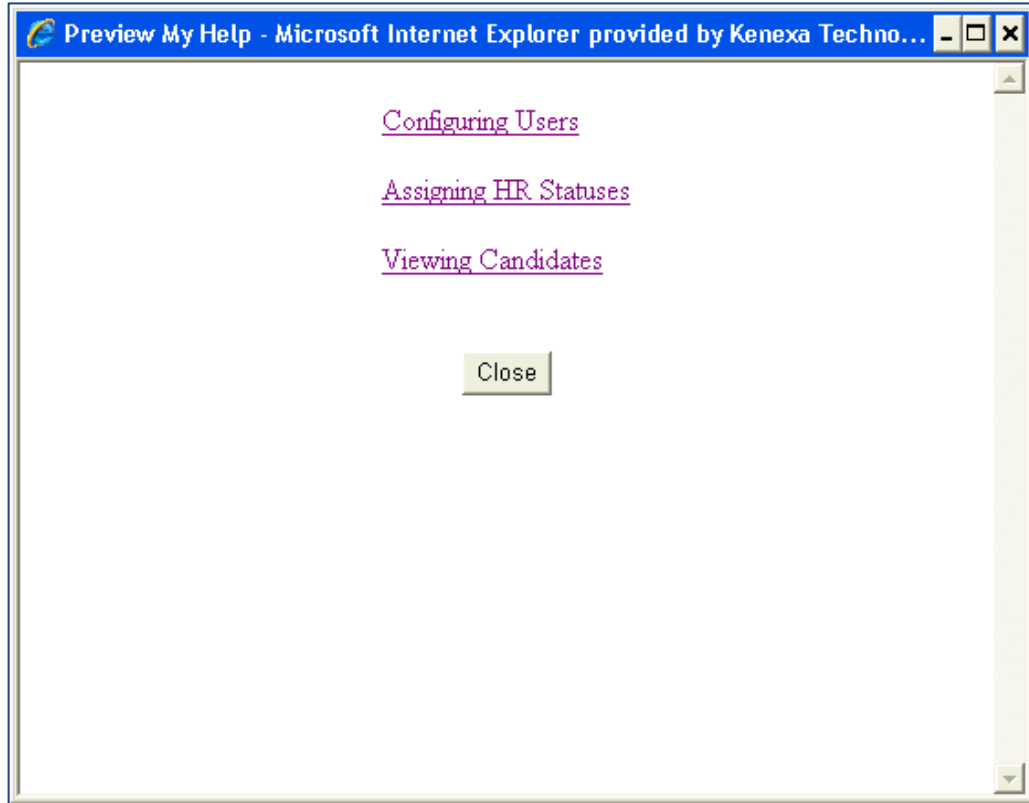
6. Click **Close** to close the preview My Help pop-up window.
7. Select the **Apply custom help configuration** checkbox and click to highlight additional user types in the scroll box to select additional users. You can use the control key to select multiple user types. All selected users will have access to the customized help links in the My Help pop-up window.

> Note: If your application supports more than one language, each supported language must have its own customized text display. All text displays must be entered using valid HTML.
>
> Custom Help Links are not translated. All custom help text appears as it is entered in the My Help page text.

8. Select **Enable for current user type** or **Disable for current user type**. Selecting enable allows the selected user type access to the My Help link in the 2xB application. Selecting the disable option does not display the My Help link in the 2xB application. The disable feature is useful when customized content is being updated or changed.
9. Click **Save**. The configuration is saved to the current user type.

   - The system saves the customized help link configuration and displays a configuration saved message if the HTML is valid.

Configure custom help

Configure custom help saved successfully

Close

Custom Help Links | 8
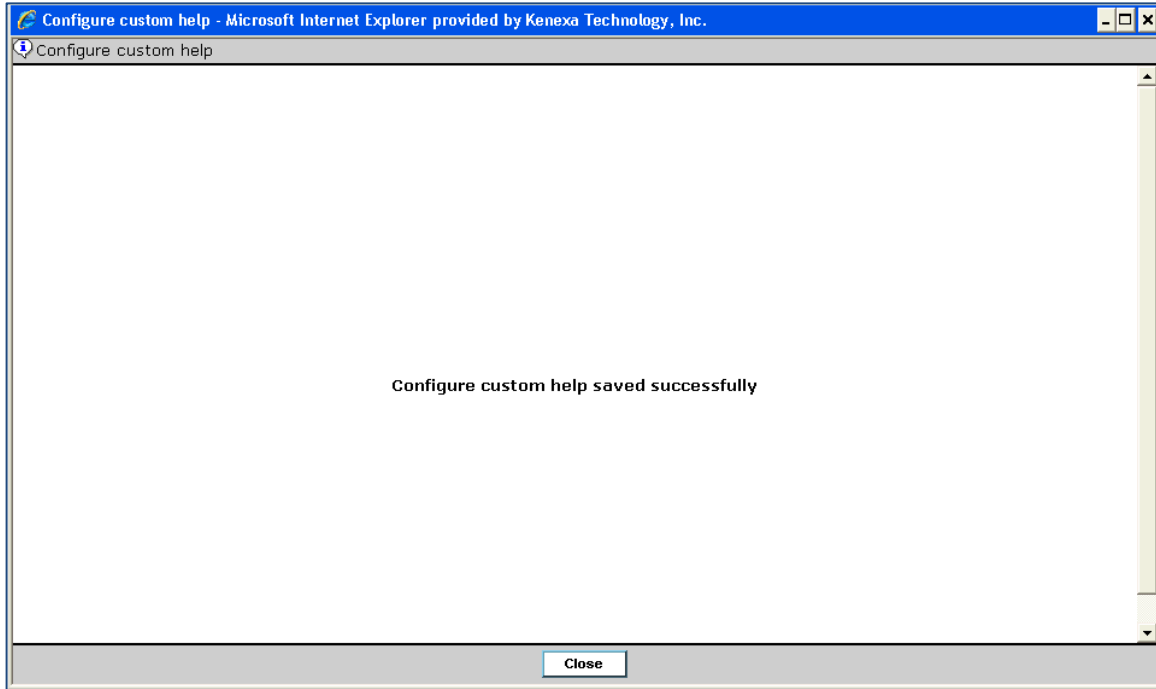
Custom Login – LDAP Authentication

This feature allows the configuration of Lightweight Directory Access Protocol (LDAP) authentication for clients accessing 2xB. Configuration of a custom login allows 2xB LDAP user logins (username and password) to be validated with an LDAP server.

Product **RDP450 Rel 13.0**	☑ 2x BrassRing
Visible Changes	☑ No – requires specific conditions / configuration for visibility.
How do I get this feature?	☑ Configuration required – contact your Kenexa Support Team for implementation details.

Feature Description

This feature allows the configuration of Lightweight Directory Access Protocol (LDAP) authentication for clients logging into 2xB. Configuration LDAP custom login allows users logging into 2xB to be validated with an LDAP server using their client-side LDAP username and password.

When LDAP configuration is complete, 2xB users logging in see the 2xB LDAP login screen. 2xB users must enter their LDAP username, password, and select their LDAP server name (if multiple LDAP servers exist, users select from the drop-down list box) to log into 2xB using LDAP.

Conditions 2xB users may experience:

- If a user tries to access 2xB and is not authenticated as a valid LDAP user with access to this server, then the user is denied access and message displays "You are not authorized to access the system; please contact your administrator."
- If a user enters an incorrect username and/or password three times in a row, an error message displays "The system can not authorize access. Your access has been locked to protect your data. Please try again later." The lockout period follows the client setting for "Lockout Period 2xB."
- The "Forgot Password?" link is hidden for clients with LDAP configuration, and the "Change Password" option is disabled.

Limitations and Known Issues

- At present, LDAP authentication is only supported for 2x BrassRing recruiter application (i.e., not for other applications like Talent Gateways and Agency Managers).
- 2xB LDAP users experiencing an invalid eLink authentication are redirected to the eLink pre-login page without any system-generated error message display.

How Do Clients Get this Feature?

This feature is controlled by new client configuration (not available for self-service). Please contact your Kenexa Support Team for more information about enabling this feature after confirming with your internal Information Technology group that LDAP is supported in your business unit.

Kenexa Tasks

Use the following instructions to configure LDAP authentication.
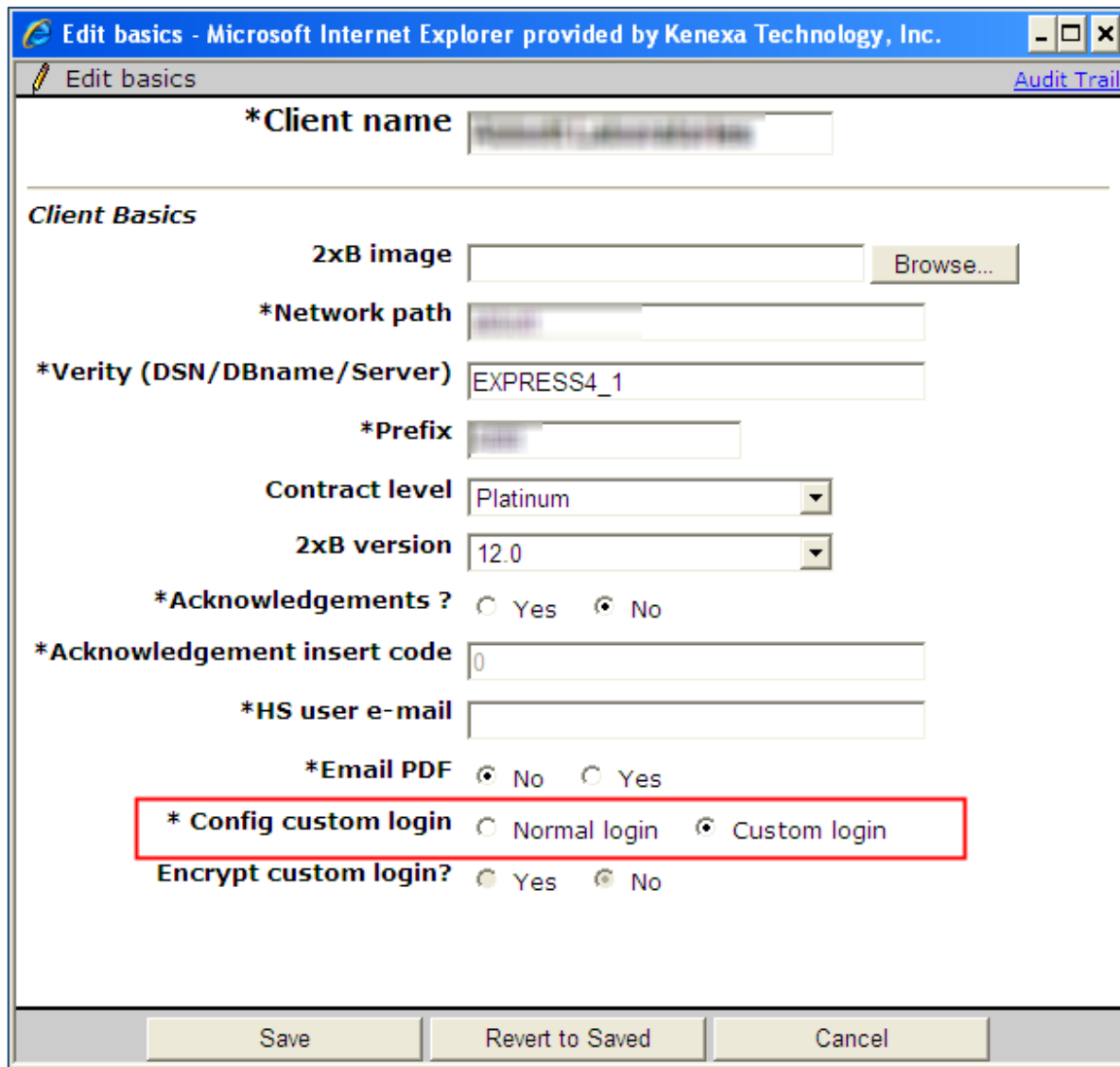
> Note: Client (or test) LDAP server must exist and be properly configured to accept Kenexa connections before LDAP authentication can occur.

Workbench

In WB:

1. In WB: **Admin > Manage Clients**.
   The Manage Clients screen displays.
2. Select the edit icon in the **Edit Basics** column.

   The Edit Basics dialog box displays.

3. Select the **Custom Login** radio button
4. Click **Save**.
    The Manage Client screen re-displays
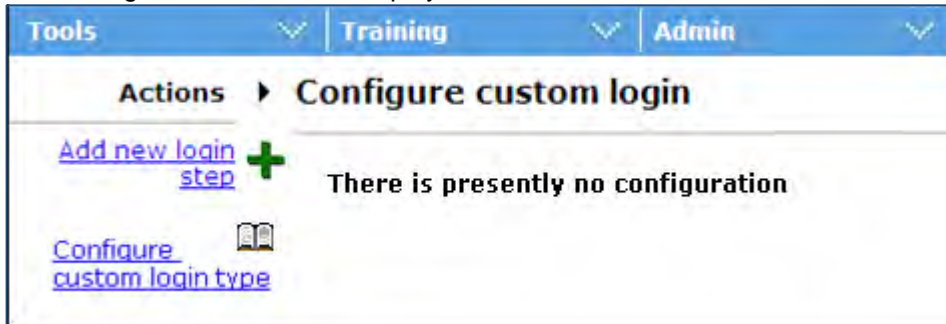
5. Select **Configure Custom Login Type**.
    The Custom Login Type screen displays.
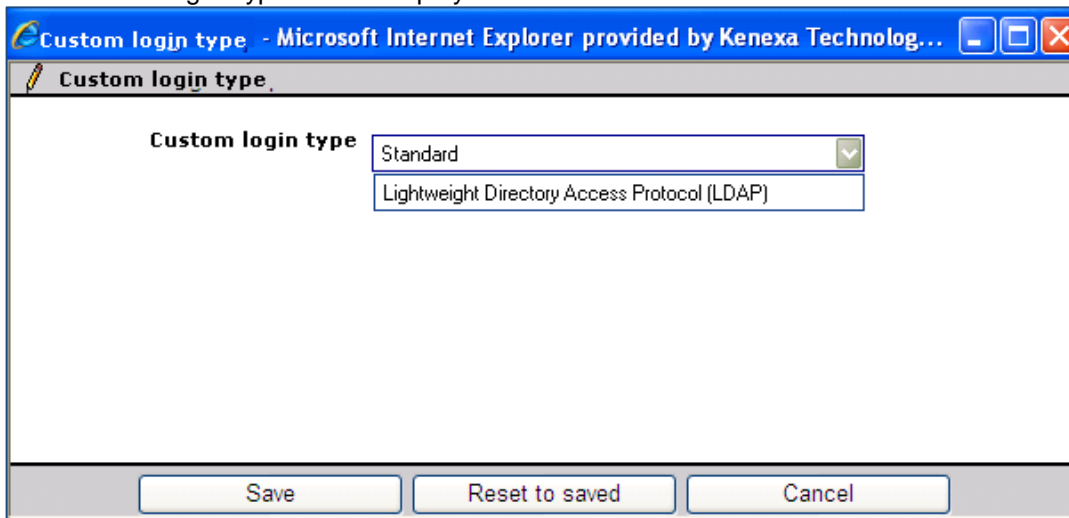
6. Select **Lightweight Directory Access Protocol (LDAP)** from the list box.
7. Click **Save**.

> ✎ Note: Enabling Custom Login immediately disables standard 2xBrassRing login functionality. Standard 2xB username and passwords will not work when custom login is enabled.

If there are any existing standard custom login types configured, they are deactivated and a warning displays.
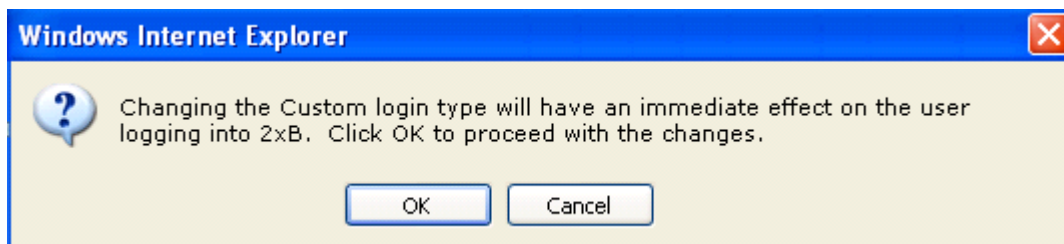
8. Click **OK** to confirm the change.
The Manage Clients screen redisplays showing the newly configured custom type.
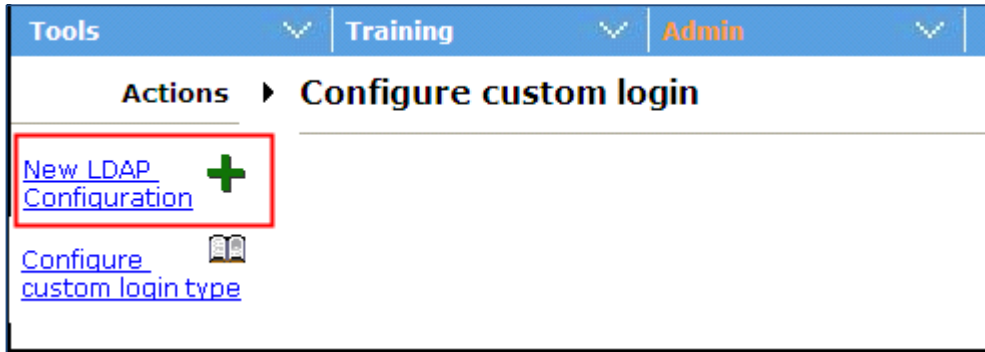
9. Click **New LDAP Configuration.**
The New LDAP configuration screen displays.
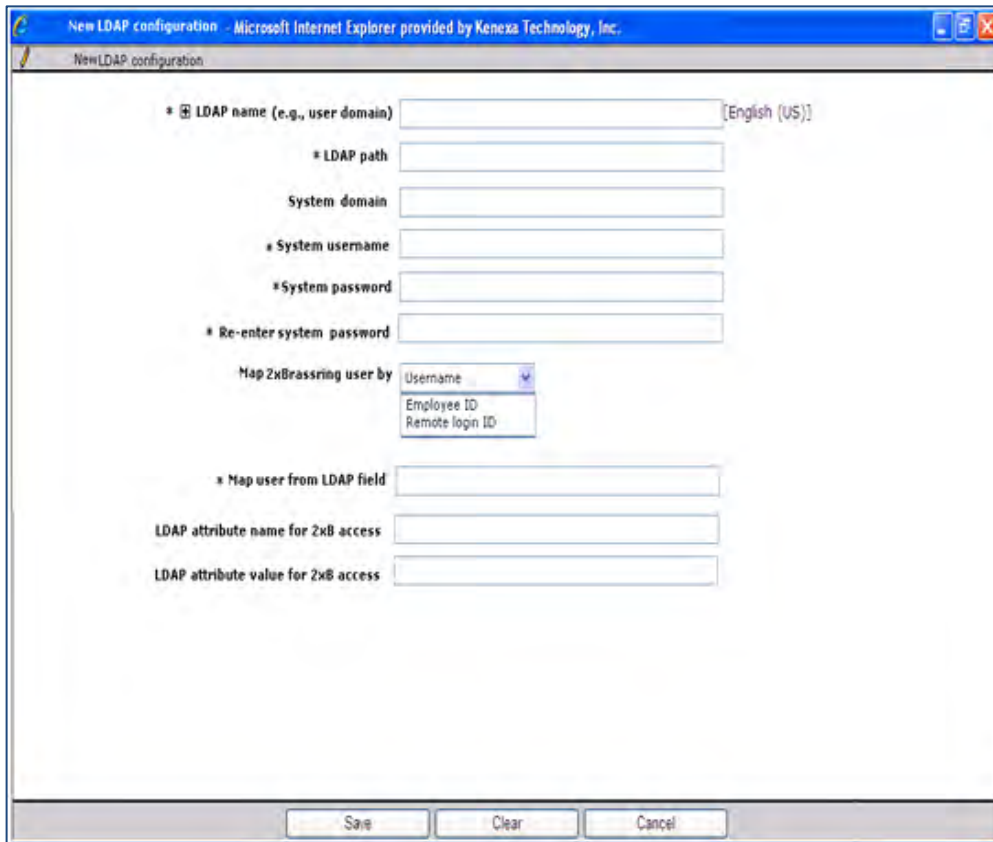
10. Enter the required information into each field in the New LDAP configuration screen. Refer to the following table for entry descriptions.

Fields marked with * are required fields

Entry	Description
LDAP Server Name	Name displayed in 2xBrassring login screen. 2xB users select this name in the drop-down list box. Character limit 100.

Entry	Description
	Name displays with + representing localization if client has purchased localization. Clicking the Plus icon (+) displays a list of translated languages. If client has multiple LDAPs, each LDAP server names must be unique.
LDAP Path	Client supplied LDAP path. (i.e., URL) Character limit 4,000.
System Domain (Optional field)	System user's usual work domain. Character limit 100.
System Username	System username used by Kenexa to log into the client's LDAP server. Character limit 100.
System Password	System password used by Kenexa to log into the client's LDAP server. Character limit 100. Masked with black circles
Re-enter System Password	System password re-entered again to ensure accuracy for masked value. Character limit 100. Masked with black circles.
Map to 2xB user by	Client selects from single-select list box to use LDAP user information (per Map user from LDAP field settings) to identify the 2xBrassRing user by the username, employee id, or remote login id.
Map user from LDAP field	Client side LDAP field that matches the selected 2xB user field. Character limit 100.
LDAP attribute name for 2xB access (Optional)	This field name can contain any attribute name existing on client LDAP that identifies if the 2XB user has access. Character limit 100.
LDAP attribute value for 2xB access (Conditionally required if LDAP attribute name is identified.)	This field name can contain any attribute value existing on client LDAP that verifies the 2XB user access. Character limit 100.

11. Click **Save**.

- If any unmet conditions exist, 2xB displays the corresponding error message.
- If all required information is included and all fields are in the correct format, the LDAP configuration takes effect immediately.
- The Configure LDAP screen re-displays.

When LDAP configuration is complete, 2xB users logging in, see the 2xB LDAP login screen.

> ✎ Note: The Kenexa "Support User (backend user)" login will continue to work

Editing and Viewing the LDAP Configuration

On the Configure LDAP workbench screen, available actions are View, Edit, and Activate/Inactivate.

Editing the LDAP Configuration

To edit the LDAP Configuration:

12. Click the edit icon.
    The Edit LDAP screen displays the following values.

- System password field would be disabled
- Re-enter system Password would be hidden
- A checkbox with the label – "Edit password" would appear beside the System password field.

A plus sign icon (+) next to the LDAP server name indicates client has purchased localization. Clicking the Plus Sign icon populates a list displaying all the client's purchased languages. The client's base locale displays by default.

13. Select the Edit password checkbox to edit the password.
14. Enter new system password.

15. (Optional) Select a value from the Map 2xBrassring user by drop-down list box.

16. Click Save.

Viewing the LDAP Configuration

To view the LDAP Configuration:

1. Click the binocular icon. .
   The View LDAP screen displays the following values.

   View field values display as entered/saved except for password field which displays the masked value.

Activate/Inactivate

Users can also use the activate or inactivate option.

To activate an LDAP Configuration:

1. Click the green activate/deactivate icon

    The icon turns red.

To deactivate an LDAP Configuration:

1. Click the red activate/deactivate icon.
    The system displays a warning message:
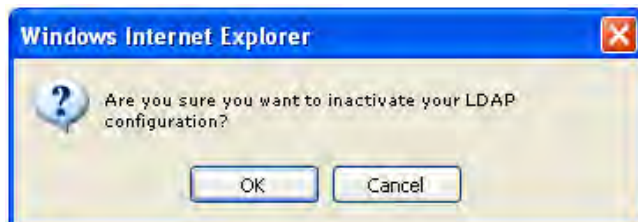
2. Click **OK** to deactivate the LDAP configuration.

Data Insight Tool – Candidate Social Media Source Information

For clients with Social Media integration enabled, this feature integrates with the social media referral email template feature that captures and stores social media source information in the candidate's Talent Record (TR). The Data Insight Tool now includes the social media source information.

Product LDP 087 Rel 13.0	þ 2x BrassRing	þ Data Insight Tool
Visible Changes	þ Yes – details in *Visible Changes* document sent for each release build.	
How do I get this feature?	þ Configuration required – contact your Kenexa Support Team for implementation details.	

Feature Description

This feature works in conjunction with the social referral email template and allows Data Insight to access and report on candidate social media referral information. Data Insight users can now generate reports on candidate source information. Clients can now determine the effectiveness of their job search campaigns by tracking each candidate's application status.

Data Insight users access the following information in the **Social Media** category:

- **Social media site name** – For example, Facebook, Twitter, Ln (for LinkedIn)

- **Posting user type** – For example, 2xB user, employee, Non 2xB user.

- **Social profile site type** – User account of the employee, candidate, and non-2xB users. For 2xB users, Social Media profile site type can be personal, corporate, or group.

- **Posted by** –- Name of the person who posted the job to social media site. The filter grid displays the name followed by user type (candidate, 2xB user, employee and/or non-system user).

- **Posted on** – Date on which the job is posted to social media site

- **Posted req id** – Req ID posted to the Social Media site

- **Email address** – Email address of the person who posted the job to social media site. The filter grid displays the name and then in brackets user type (candidate, 2xB user, employee and/or non-system user).

The new fields are available in Filter, Security User Role and Output Worksheets (**Reports > Data Insight Tool > Manage templates > Create new template| Edit template** and **Reports > Data Insight Tool > Manage users and roles**). The Data Insight tree view is shown in the following screen shots. Social media integration must be enabled for this Data Insight tree view to be visible.

Output Selection Tool

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

⊞ Candidate
⊞ Forms
⊞ Requisitions
⊞ Job Application
⊞ Working Folder
⊞ Agency Manager
⊞ Event Manager
⊟ Social Media
☐ Social media site name
☐ Posting user type
☐ Social profile site type
☐ Posted by
☐ Posted on
☐ Posted req id
☐ email address

Filter Selection Tool

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

⊞ Candidate
⊞ Forms
⊞ Requisitions
⊞ Job Application
⊞ Working Folder
⊞ Agency Manager
⊞ Event Manager
⊟ Social Media
☐ Social media site name
☐ Posting user type
☐ Social profile site type
☐ Posted by
☐ Posted on
☐ Posted req id
☐ email address

User Role Workshop

Selection Tool

Select up to 10 items to which to restrict access, and add the items to the Restrictions Worksheet.

⊞ Candidate
⊞ Forms
⊞ Requisitions
⊞ Job Application   All the Social Media fields will be
⊞ Working Folder   available for Security User Role filtering
⊞ Agency Manager
⊞ Event Manager
⊟ Social Media
☐ Social media site name
☐ Posting user type
☐ Social profile site type
☐ Posted by
☐ Posted on
☐ Posted req id
☐ email address

Add to Worksheet ↓

Report Samples

The following are some samples of generated reports using the candidate social media information.

What users posted to social media sites

Social media site name	Posting user type	Social media profile type	Posted by	Posted on	Posted req id	Email address
Ln	2xB User	Corporate	Maria Sutter	20-Sep-11	106BR	Maria.Sutter@ABC.com
Facebook	Employee	Personal	Peter Monk	22-Sep-11	101BR	Peter.Monk@Sys.com
Twitter	Non 2xB User	Personal	Mike White	25-Sep-11	123BR	Mike.white@gmail.com

What social media site is giving the best source yield

Req Id	Resume key	Candidate first name last name	Current HR status	Social media site name	Posting user type	Social media profile type	Posted by	Posted on
100BR	18901	Steve Smith	1st Interview	Ln	2xB User	Corporate	Maria Sutter	20-Sep-11
101BR	18902	Mark Reddy	Final Round	Facebook	Employee	Personal	Peter Monk	22-Sep-11
102BR	18903	Stephen Simon	2nd Round	Twitter	Non 2xB User	Personal	Mike White	25-Sep-11
100BR	18904	Steve Smith		Twitter	2xB User	Corporate	Maria Sutter	26-Sep-11

Limitations and Known Issues

Incomplete submissions might be saved in database tables but will not be available for Data Insight reports

How Do Clients Get this Feature?

A new client setting must be enabled for Social Media Integration. Please contact your Kenexa Support Team for more information about enabling this feature.

Kenexa Tasks

This Social Media feature requires enabling two new client settings.

Workbench

This feature requires two new Enable Social Media Integration client settings.

The two social media integration client settings are:

- Enable Social Media Integration
- Enable Social Media Integration with Talent Record

To enable the Social Media Integration client settings:

1. **Admin > Manage Clients > Edit Client Settings**.
   The Edit Client settings dialog box displays.
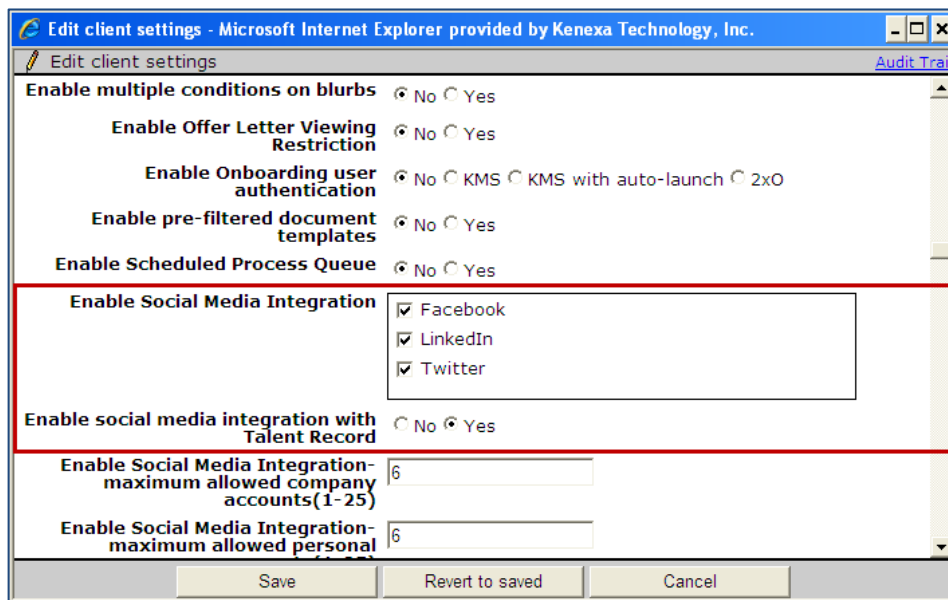
2. Select the checkbox next to the social media sites in the **Enable Social Media Integration** selection.
3. Select the **Yes** radio button in the **Enable Social Media Integration with Talent Record** selection.
4. Click **Save**.

Data Insight Tool – Filtering on Auto-fill Fields

Auto-fill fields in Candidate forms, Req Subsidiary forms, Req Addendum forms and Document Subsidiary forms are now available for use as filters or for restricting or granting User Role access to users in Data Insight.

Product RDP566	☑ 2x BrassRing	☑ Data Insight Tool
Visible Changes	☑ Yes – details in *Visible Changes* document sent for each release build.	
How do I get this feature?	☑ Automatic – see details below.	

Feature Description

Auto-fill type fields were previously available for output in Data Insight, but not for use as filters or for restricting or granting User Role access to users in Data Insight. Now all auto-fill fields in Candidate forms, Req Subsidiary forms, Req Addendum forms and Document Subsidiary forms will display in the Filter Worksheet and the User Role Worksheet, as well as in the Output Worksheet.

Auto-fill fields are available in Filter selection tool.

Auto-fill fields also appear in User Role selection tool.
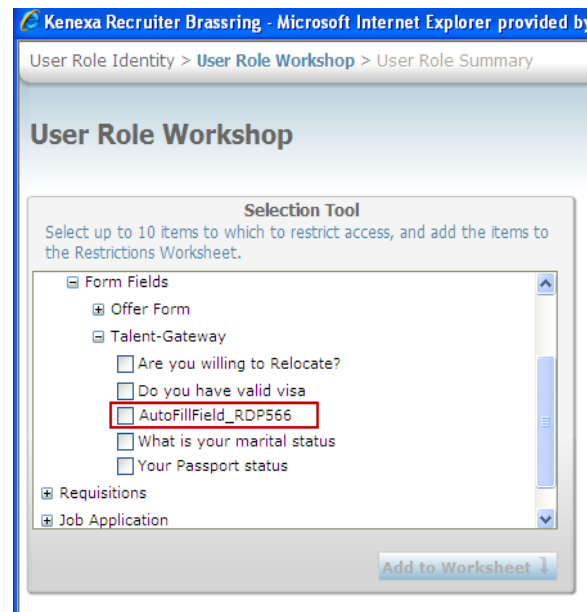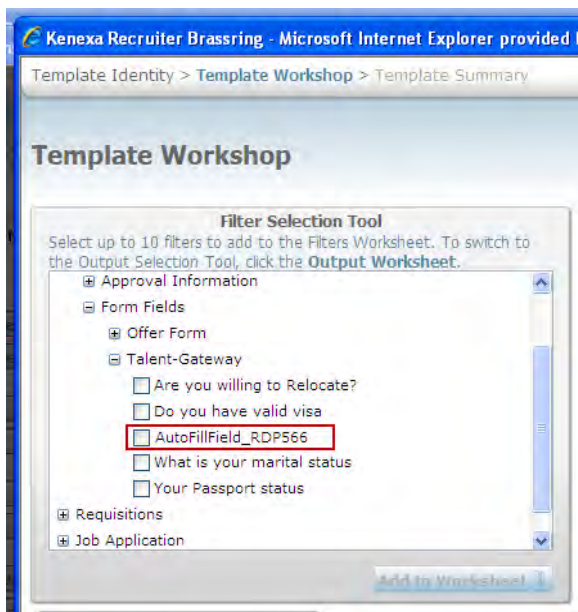
How Do Clients Get this Feature?

This feature is available automatically without configuration.

Data Insight Tool – "Last edited" Date Fields

Data Insight Tool users can now report on these candidate record information fields: Date last edited and Date last edited by candidate.

Product RDP568 Rel 13.0	☑ 2x BrassRing	☑ Data Insight Tool
Visible Changes	☑ Yes – details in *Visible Changes* document sent for each release build.	
How do I get this feature?	☑ Automatic – see details below.	

Feature Description

Data Insight Tool users can now report on these candidate record information fields in the **Candidate > System Information** category:

- Date last edited
  date and time that the candidate's profile was last edited (by candidate, system, or user)

- Date last edited by candidate
  Date and time this candidate's last logged in and edited/uploaded any information

- (Via the Talent Gateway).

The new fields are available in Filter, Security User Role and Output Worksheets (**Reports > Data Insight Tool > Manage templates > Create new template| Edit template** and **Reports > Data Insight Tool > Manage users and roles**).
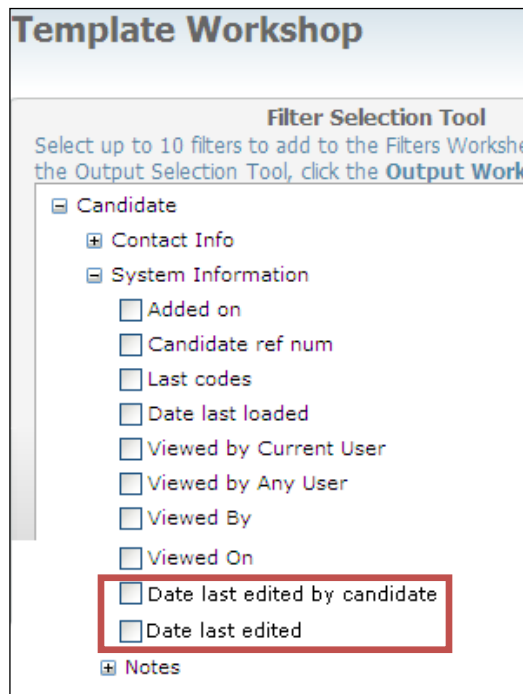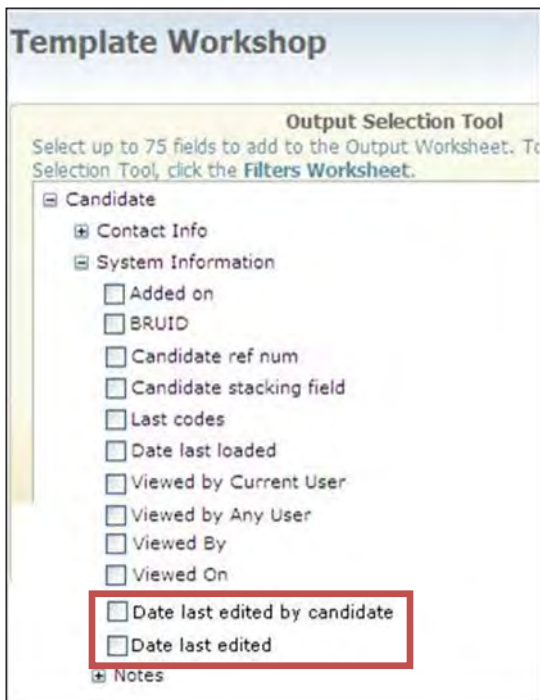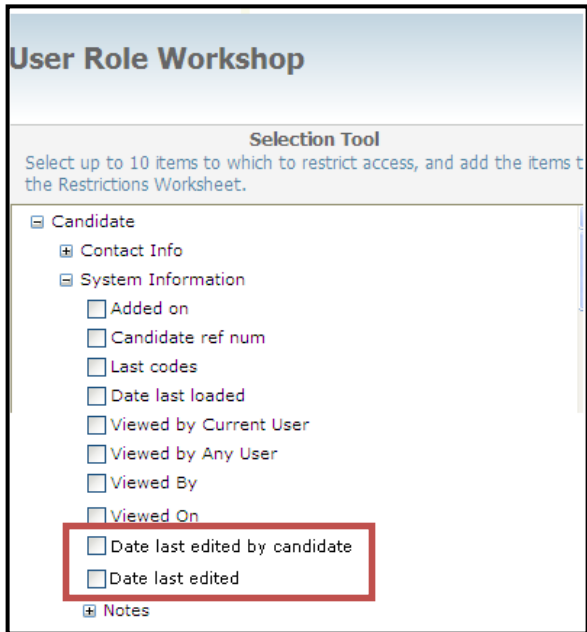
When you specify filter criteria for either of these fields, you also select date and time options
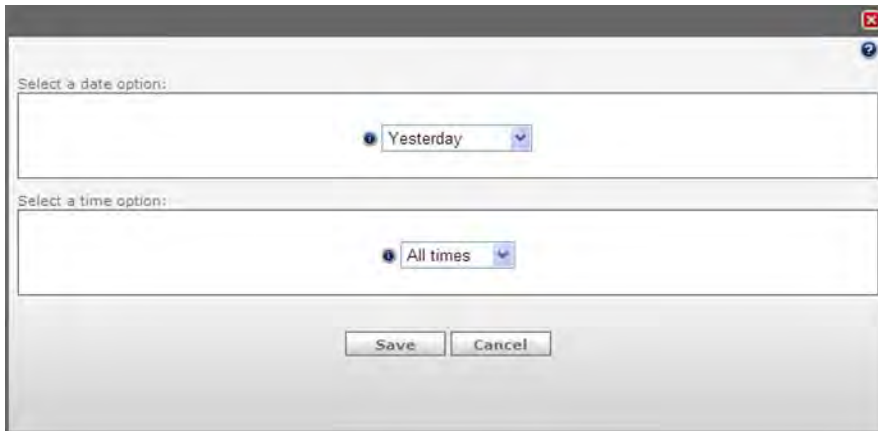
How Do Clients Get this Feature?

This feature is available automatically without configuration.

Data Insight Tool – Report Type Options

Data Insight has "Requisition" and "Default" Report Type options to handle reporting when count of candidates is zero.

Product RDP567 Rel 13.0	☑ 2x BrassRing	☑ Data Insight Tool
Visible Changes	☑ Yes – see the *Visible Changes* document sent out for each release build.	
How do I get this feature?	☑ Automatic – see details below.	

Feature Description

Previously, if a user wanted a list of open reqs (such as those opened on a particular date, with first and last names of the candidates), only reqs with candidates in their folder were returned. For example, if Req A had two candidates and Req B had none, Data Insight's results included data only for Req A. This occurred because Data Insight executed an inner join on reqs and candidates, so returned only those reqs with associated candidates.

To address this problem, Data Insight will now include new **Report Type** options for users to select when reporting on open reqs. The options are selected on the **Template Identity** screen, and determine how the data results should be returned. Options are:

- **Default**
  Generates reports with current functionality; only reqs with at least one associated candidate will be returned.
  If the user selects "total candidates" as an available output option then the total for Req A would be 2 and Req B will not be displayed.

- **Requisitions**
  Returns all req rows regardless of whether candidates are attached to a requisition or not. For example, will return rows including: Req A and all associated Candidates to the Req, Req B with blanks in the Candidate's first and last name as there are no candidates.
  If the user selects "total candidates" as an output option, then the total for Req B will be "0."

- **Working Folder**
  Returns all folder rows regardless of whether there are any candidates in the folder. For example, will return rows including: Folder A and all candidates in the folder, Folder B with blanks in the candidate's first and last name if there are no candidates.
  If user selects "total candidates" as an output option, then the total for Folder B will be 0.

In Create New Template, you select Report Type on the Template Identity Page under new "Base Functionality" section.

New Report Type Options with Hover Text

All current Data Insight templates will be set to "Default" for Report Type setting on the Template Summary Page. Users can change the selection in edit mode. User/Roles functionality is not affected by this change.

Summary Page with New Report Type

The following tables show sample data for the same scenario for each

When Default is chosen (current functionality)	When Requisition is chosen

SET 1 Filter: NONE

Auto Req	Status	Current HR Status	Total Candidates
10BR	Open	First Interview	1
10BR	Open	Second Interview	1
30BR	Open	First Interview	1
50BR	Open	0-Filed	1

Auto Req	Status	Current HR Status	Total Candidates
10BR	Open	First Interview	1
10BR	Open	Second Interview	1
20BR	Open		0
30BR	Open	First Interview	1
40BR	Open		0
50BR	Open	0-Filed	1

SET 2 Filter: AutoReq in 10BR, 40BR

Auto Req	Status	First Name	Last Name	Current HR Status
10BR	Open	FName1	LName1	First Interview
10BR	Open	FName2	LName2	Second Interview

Auto Req	Status	First Name	Last Name	Current HR Status
10BR	Open	FName1	LName1	First Interview
10BR	Open	FName2	LName2	Second Interview
40BR	Open			

SET 3 Filter: HR status = First Interview

Auto Req	Status	First Name	Last Name	Current HR Status
10BR	Open	FName1	LName1	First Interview
30BR	Open	FName5	LName5	First Interview

Auto Req	Status	First Name	Last Name	Current HR Status
10BR	Open	FName1	LName1	First Interview
30BR	Open	FName5	LName5	First Interview

WORKING FOLDER AREA
When Default is chosen (current functionality)

Status	Folder Name	Date Created	Folder Owner	Folder Type	First name	Last name	Email
Active	Arathis Folder	19-Apr-11	Sivakumar	Public	Jagadeh	P	Z@gmail.com
Active	MyFolder	30-Mar-11	Sivakumar	Public	anil	kumar	9@gmail.com
Active	Sivakumar	4-Oct-10	Sivakumar	Inbox	a	a	7@gmail.com
Active	Sivakumar	4-Oct-10	Sivakumar	Inbox	aaa	cccc	

When Working Folder is chosen

Status	Folder Name	Date Created	Folder Owner	Folder Type	First name	Last name	Email
Active	Arathis Folder	19-Apr-11	Sivakumar	Public	Jagadeh	P	Z@gmail.com
Active	MyFolder	30-Mar-11	Sivakumar	Public	anil	kumar	9@gmail.com
Active	Sivakumar	4-Oct-10	Sivakumar	Inbox	a		
Active	Sivakumar	4-Oct-10	Sivakumar	Inbox	aaa	cccc	
Active	TestingrSample	14-Jul-11	Sivakumar	Public			
Active	TestingSample 2	23-Jul-11	Sivakumar	Public			

How Do Clients Get this Feature?

This feature is available automatically without configuration.

eLinks – Deep Links Authentication on SSO Talent Gateways

This feature extends 2xB's Single Sign On (SSO) authentication capability to two Talent Gateway interior pages – "Search results" and "Job details." Deep Links authentication provides automatic authentication for logged- in candidates, such as when they click the eLink to the Job details page in a Search Agent email.

Product RDP520 Rel 13.0	☑ 2x BrassRing ☑ Workbench Self-Service	☑ Talent Gateways
Visible Changes	☑ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	☑ Configuration required – contact your Kenexa Support Team for implementation details.	

Feature Description

This feature allows clients to configure the SSO authentication handshake to extend to two Talent Gateway pages, "Search results" and "Job details." Clients must have SSO enabled to use this functionality because deep links use Single Sign On (SSO) to authenticate each candidate's or user's TG login credentials.

Candidates could experience this functionality when they click the eLink in a search agent email message. SSO determines if a candidate is logged into the TG or not. When clicking a deep link, logged-in users bypass the TG login screen and go directly to a job details or search results page. Non-logged in users land on the TG login screen. Each eLink email message can contain multiple deep links.

2xB Candidate Experience

Logged In

This is one example of how a candidate or internal candidate/user could experience deep links authentication. The candidate/user configures a job search agent on a TG to send eLink messages daily.
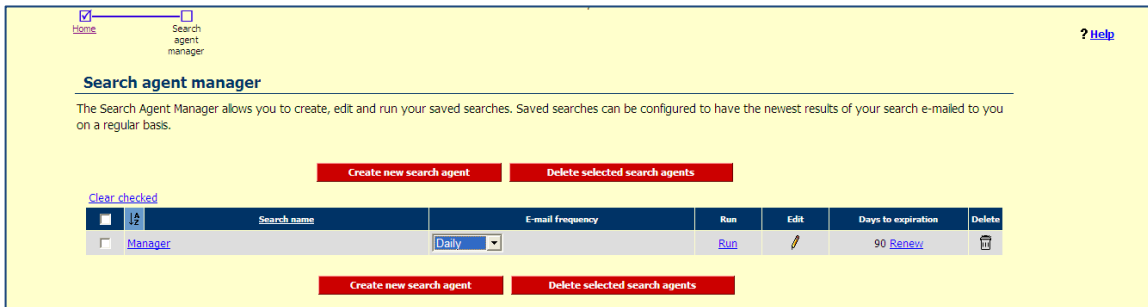
The job search agent completes the job search and sends an eLink message to the candidate/user.

If the candidate is logged into the TG, or is an internal user logged into 2xB, SSO verifies the candidate/user and brings the candidate directly to the job details page…

…or to the job search results page,

Not Logged In

If the candidate or user is not logged when clicking the eLink, that candidate/user lands on either a TG (TG workflow) or Gateway Questionnaire (GQ workflow) Login screen.

Deep Links Authentication on SSO Talent Gateways│ 2
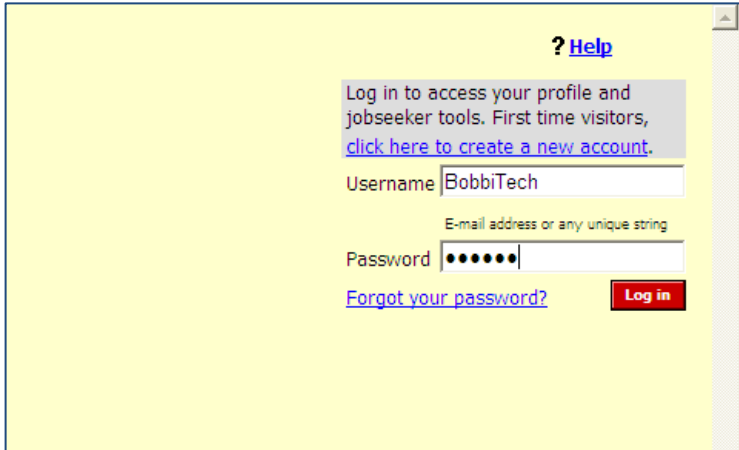
After logging in, the candidate/user lands on the job search results page or the job details page.

Limitations and Known Issues

Kenexa engineering must work with clients to configure deep link functionality. Maintenance requests might be required if clients want to create and place additional links to interior pages of Talent Gateways.

Once enabled, the SSO TG Login cannot be disabled if any of the client's existing TGs are associated with the SSO TG Login URL.

How Do Clients Get this Feature?

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

Kenexa Tasks

This configuration requires consultation with Kenexa engineering.

Workbench

1. **Tools > Talent Gateways > Admin**.
   The Talent Gateway Administration page displays:

   Select a gateway (or add new) and click the **edit** icon.
   The Talent Gateway page displays.

2. Click the **Yes** radio button to select the SSO Talent Gateway.
3. **Select encryption key group** from the drop-down list box.
4. Enter URL in **SSO Talent Gateway Login URL** text box.
5. Select the functional areas or TG pages to which SSO deep links authentication should be extended in the **Enable SSO Talent Gateway Login for**: multi-select box.
6. Enter URL in **SSO Talent Gateway Log Out URL** text box.
7. Click **Save**.

eLinks – Removing Respond Button from Talent Record

Your organization can now remove the Respond button on eLinks sent from a candidate Talent Record or from the Actions menu in a candidate grid, thus removing recipients' ability to post a response as a note on the candidate's record.

| Product RDP531 Rel 13.0	☑ 2x BrassRing	☑ eLinks
Visible Changes	☑ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	☑ Configuration required – contact your Kenexa Support Team for implementation details.	

Feature Description

When 2xB users send an eLink from a candidate Talent Record or from the Actions menu in a candidate grid, a "Respond" button is typically available in the right corner of the displayed Talent Record. The recipient can click to send feedback, which is posted to the Notes section on the candidate's Talent Record.
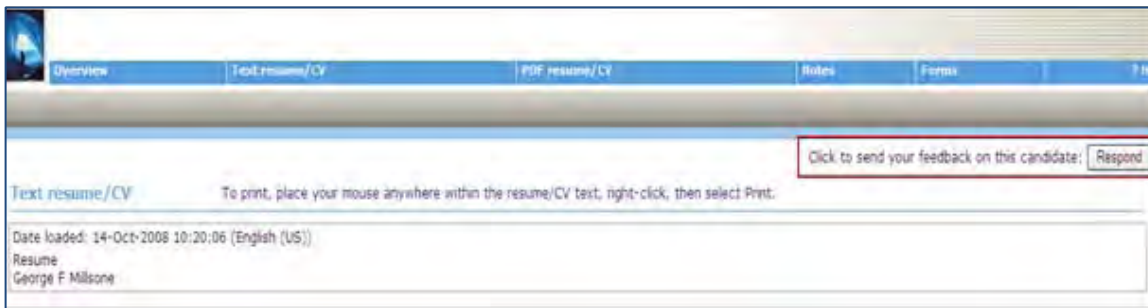
This feature allows your organization to remove the button, thereby removing recipients' ability to post that feedback.

eLinked Talent Record with no Respond button or instructional text
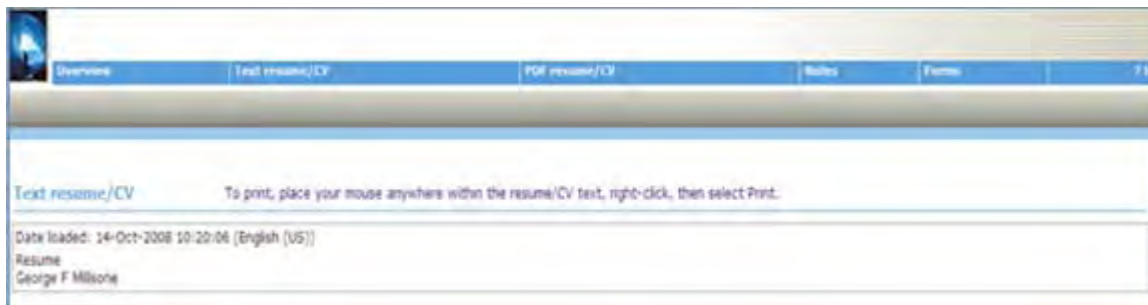
How Do Clients Get this Feature?

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

Kenexa Tasks

Workbench

New client setting: **eLink talent record - show "Respond" button**

- **Yes** (default option) displays and enables the 'Respond' button and the text '"Click to send your feedback on this candidate:"

- **No** hides the 'Respond' button and the text.

Event Manager - Enhancements

The following features list outlines new features added to Event Manager from release 12.5 Build 0 to release 13.0. These features are also included in the Event Manager Guides, the *Event Manager Administrator's Guide* and the *Event Manager User's Guide,* posted on the User Resource Center (URC).

Product **LDP078, Rel 13.0**	þ 2x BrassRing	þ	Event Manager
Visible Changes	þ Yes – details in *Visible Changes* document sent for each release build.		
How do I get this feature?	þ Please refer to each individual feature for configuration details.		

Feature Description

New Event Manager enhancements provide a more integrated experience for 2xB users. Event Manager functionality includes more advanced configuration features for administrators and a more streamlined experience for candidates self registering with Event Manager.

Features List

The following list is an introduction to Event Manager features released in 13.0. Following the list is a brief description of each feature including abbreviated configuration instructions. Most new features are controlled by new client settings. Please contact your Kenexa Support Team for more information about enabling these features.

Improved Messaging Usability

- Customized Event Registration Pages
- Message Template Categories
- Message Token Usability
- Requisition Associations
- Individual Invitation Records
- Automatic Event Build Schedules
- Event Change Notifications
- Internal Event Forms

Multi-Language Candidate Communications

- Grouping of Candidates by Language
- Language Customization of Event Attributes

Miscellaneous

- Enhanced Event Schedule Build Warnings and Error Messages
- Parallel Activity Group Types
- Event Batches (JCDD)

Customized Event Registration Pages

Event Manager Administrators can now customize Registration Pages messages viewed by candidates during the registration process. Customization of Registration Pages display messages allows administrators to define different event registration responses for different event types and situations. For example, for candidates who register for unavailable events, administrators can customize the message to refer candidates to other events, contact sources or any number of options.

Configuring Customized Candidate Registration Pages

Use the following procedure to customize Registration Pages:

In Event Manager:

1. Access the **Admin > List Maintenance > Registration Pages**.
2. Click **New** to add a new Registration Page or use the radio button to select an existing Registration Page and Click Edit. .

3. Click **Edit Messages**.
4. The Admin: Registration Pages Messages screen displays.

You can edit one, all, or none of these message fields.

5. Click **Save** to save the edited Registration Page messages.
6. Click **Save** if this is a New Registration Page. If not, return to main Registration Page.
   The New Admin: Registration Pages displays the new Registration Page in the List.

How Do Clients Get this Feature?

Event Manager Administrators configure customized Registration Pages.

Message Template Categories

During message template creation, Administrators can now categorize message templates and streamline the workflow. When a 2xB user sends messages from either the Event page or the Candidate page only those templates associated with a specific chosen category display in the drop-down list box. For example, candidate reminder messages only display in the drop-down list box when 2xB user are sending reminder messages, candidate confirmation message templates only display when 2xB users are sending candidate confirmations, etc.

The message template categories are:

- Assessor Send Email
- Candidate Reminder
- Candidate Confirmation
- Candidate Send Email
- Candidate Invitation
- All Other Messages

Note: Existing message templates can be categorized at the client's convenience. This feature does not automatically categorize existing templates.

In the following example, a 2xB user sends an assessor an email. All message templates for assessor have been categorized as "Assessor Send Email."

1. Template Administrator creates a message template for assessors and selects the "Assessor Send Email" category.
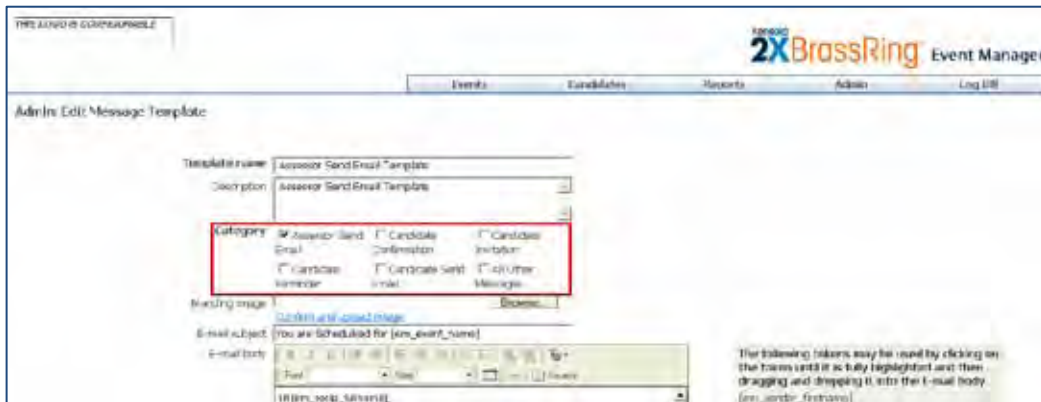
2. 2xB user clicks the Send email in the Admin: Assessors on an Event page.
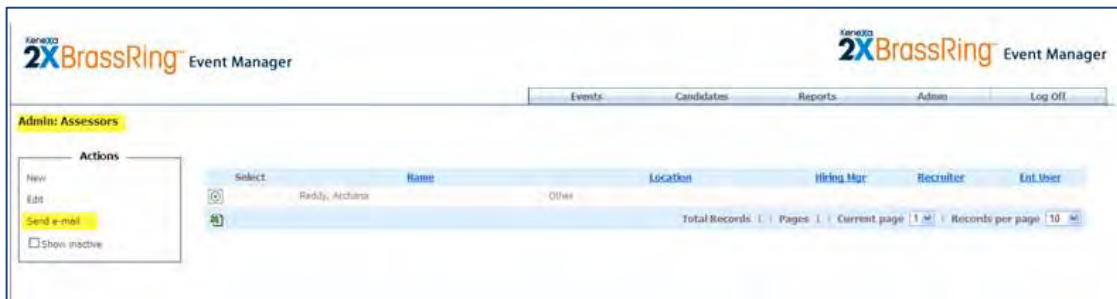
3. The Send Message screen displays listing only those message templates categorized as Assessor Send Email.
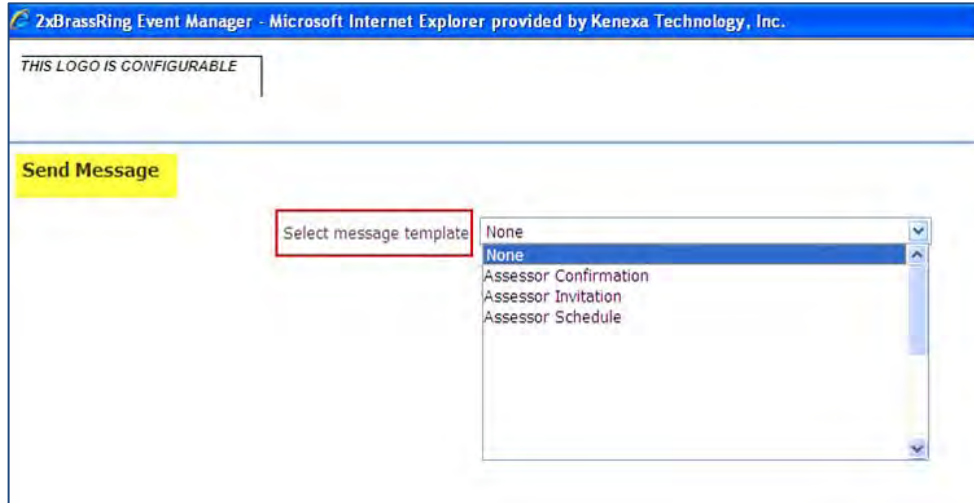
> Note: Message templates categorized as "All other message category" display in the drop-down list box when sending Event Team Confirmation Messages, Event Team Cancellation Message, and Recurring Event After Messages.

How Do Clients Get this Feature?

Event Manager Administrators configure message templates. Please contact your Kenexa Support Team or Certified Workbench User for more information.

Message Token Usability

Event Manager token usability has been enhanced to provide a better user experience. When sending messages in Event Manager, 2xB users can now hover over a merge token to display a screen tool tip detailing what the merge token represents. The screen tip displays below and to the right of the selected message token.

In addition, help text now displays in the message token box, "The following tokens may be used by clicking on the token until it is fully highlighted and then dragging and dropping it into the message body."

How Do Clients Get this Feature?

No configuration is required for this feature.

Event Manager candidate screens now display requisition associations for each candidate, regardless if they were sent from a working folder or a requisition folder. If a candidate in Event Manager is associated with more than one requisition, the candidate displays multiple times, once for each requisition.

In addition to the Event Roster screen, the following Event Manager screens now display requisition information:

- Unscheduled Candidates
- Scheduled Candidates
- Candidate Search – Unscheduled Candidates
- Candidate Search – Scheduled Candidates

- Event configuration; Candidates tab
- View candidate page

The following example shows the candidate search screen with the requisition column.
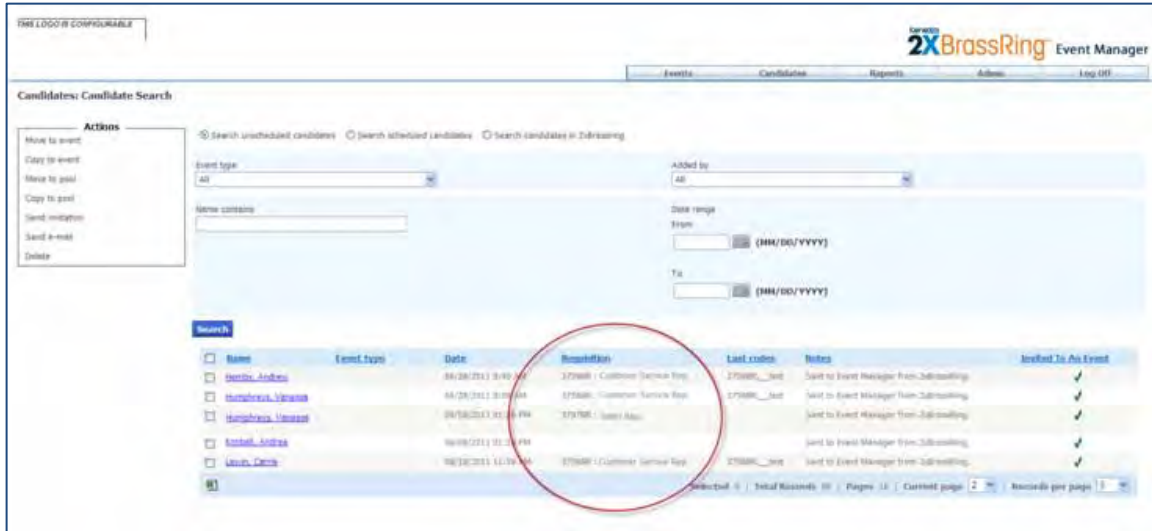
If a candidate is sent to Event Manager from a working folder, the requisition number is blank (as shown in the example above) but the candidate record displays with a hyperlink to the View Candidate page. The View Candidate screen and the subsequent history tab display the requisition information.
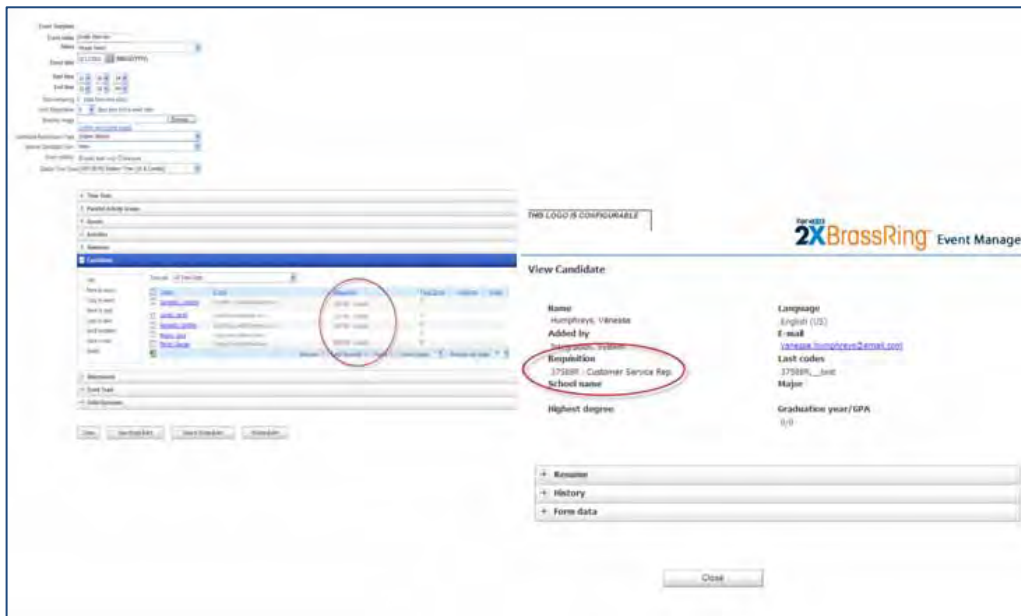
The Event Manager default setting to display requisition information is set to Yes but administrators can edit the default setting in Systems > General settings.
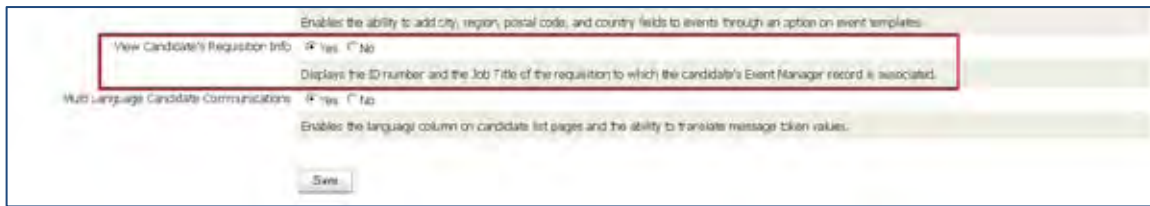
How Do Clients Get this Feature?

No configuration is required for this feature.

Individual Invitation Records

Although the Event Manager Talent Gateway (TG) screen displays separate entries for each event invitation sent to a candidate, previously 2xB users could not view this information from within Event Manager. Event Manager enhancements now include the ability to view the date an invitation was sent in the Candidates tab in the New/Edit Event screen.

1. In **New** or **Edit Event** screen, click **+** to expand the Candidates section.
2. Select "**Unscheduled Timeslot**" from the drop-down list box.
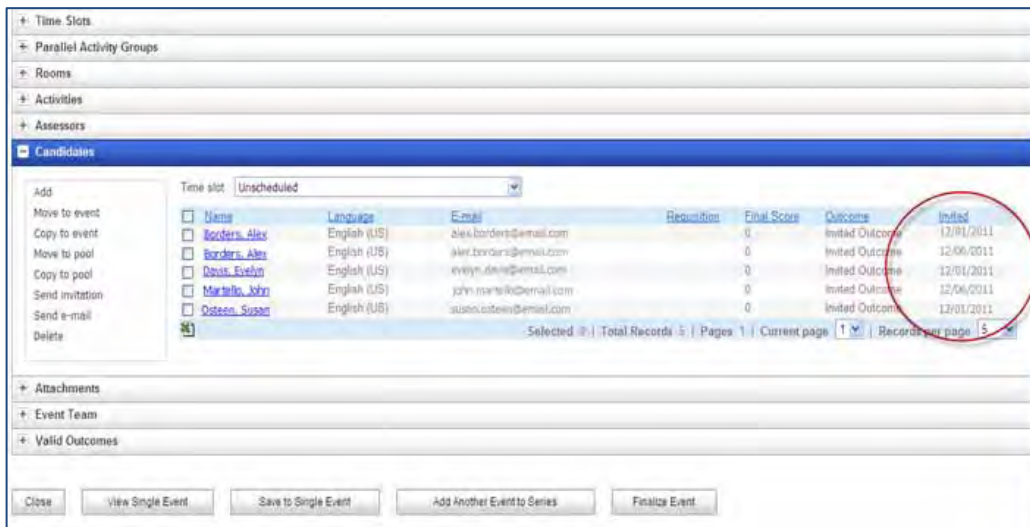
3. The Invited column displays the date each candidate was sent an invitation.

How Do Clients Get this Feature?

No configuration is required for this feature.

Automatic Event Build Schedules

When 2xB users create and save events, the automatic build scheduler now runs at save time to ensure events do not contain build errors. When the build cycle completes, errors and warnings display if any exist.
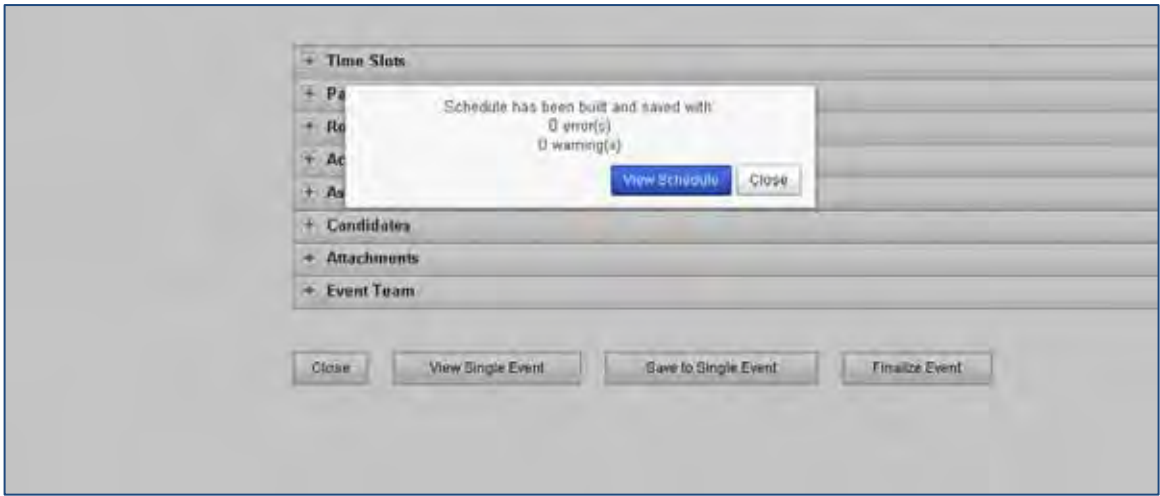
- 2xB users can click **View Schedule** to view the event schedule.
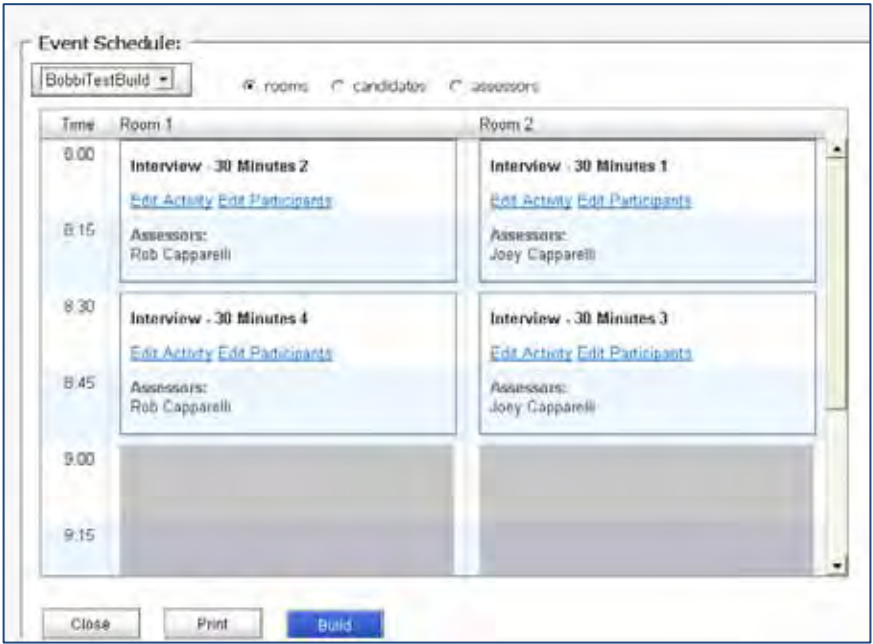
How Do Clients Get this Feature?

No configuration is required for this feature.

Event Change Notifications

2xB users can now configure notifications to be sent to event participants (candidates and assessors) when an event changes. Event changes encompass any type of event schedule change; for example, date, room, or time slot changes. Event Manager administrators enable the notification functionality so that when event changes occur at build time, assessors and candidates are automatically notified using templates created by the administrator.

To configure event change notifications:

1. **Admin > System > Notifications.**
    The notifications screen displays.
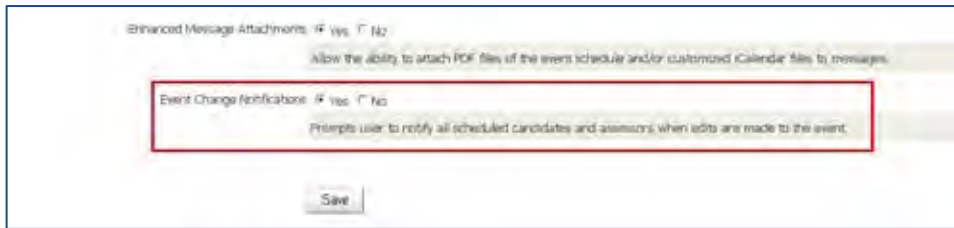
2. Click **Yes** for **Event Change Notifications**.
3. Click **Save**.

When event changes notifications are enabled, 2xB users can notify event participants at build time when editing existing events change.

1. 2xB user makes changes to an existing event and clicks **Save**.
    Event Manager completes build and displays a pop-up window.
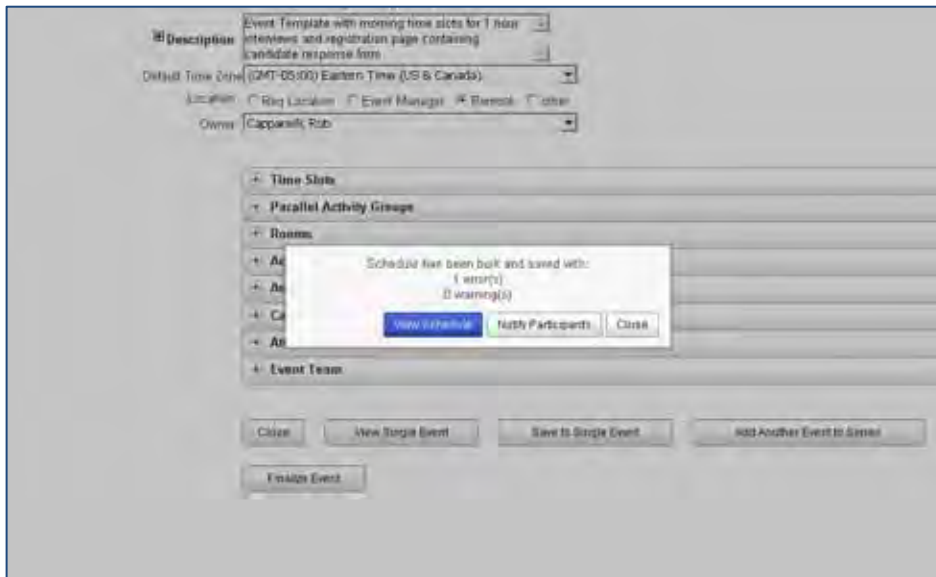
2. 2xB user clicks **Notify Participants**.
    Event Manager directs 2xB user to the **Send Message** screen.

3. 2xB user selects message templates for assessors and candidates and clicks **Send**.

How Do Clients Get this Feature?

No configuration is required for this feature.

Internal Event Forms

Internal Event Forms, previously only available for candidates who self-registered for events, are now available for all manually scheduled candidates. Internal Event Forms are candidate forms used by assessors to document a candidate's performance during an interview. Assessors can now access and complete internal event forms for all Event Manager candidates. If Internal Event Forms are configured for Event Manager, there are no additional configurations required to include manually scheduled candidates.

The *Event Manager Administrator's Guide* provides instructions on configuring and Internal Event Forms.

To view an Internal Event Form:

1. Select an event from the Event Roster.
2. Click the **Actions** menu and select **Open Event Form**.
   The candidate form opens with some pre-populated fields.
3. Assessor completes internal event form and clicks **Save**.

How Do Clients Get this Feature?

When an Event Administrator has configured internal event forms, no additional configuration is required.

Multi-Language Candidate Communications

Event Manager now displays a language column for candidates, allows clients to translate event attributes, sorts candidates by language when sending messages, and allows users to assign language-specific message templates in event batches where candidates are automatically invited to events.

> **Note**: It is the client's responsibility to compose language-specific communication templates. Event Manager does not translate content fields.

Language Display Column

A new configuration setting introduced in the System administration screen configures the display of a language column for candidates. If a client is only configured for one language in Event Manager, the candidate's language field *only* displays in the View Candidate screen.

1. **Admin > System > General.**
   The System setting screen displays.
2. Select **Yes** for **Multi Language Candidate Communications**.

3. Click **Save**.

> **Note:** The only related functionality not controlled by the system setting is the display of the language on the View Candidate page.

The Language column now displays on the Candidate Search pages, Unscheduled Candidates page, Scheduled Candidates page, and the Candidates tab on the New/Edit Event page.
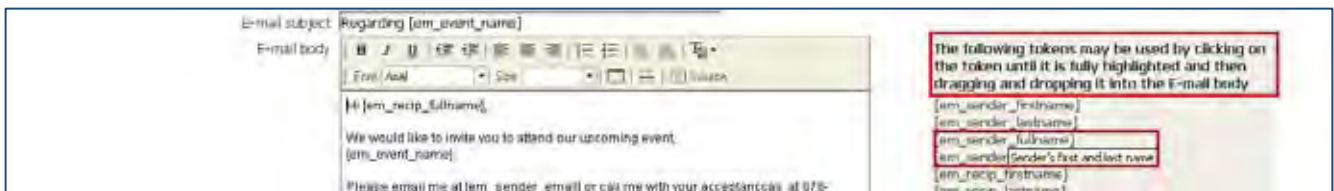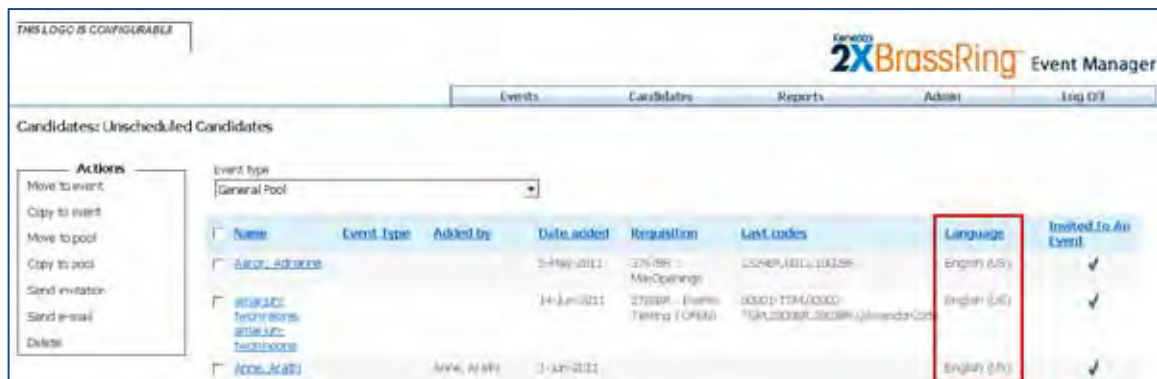
How Do Clients Get this Feature?

Event Manager Administrators configure System n> General settings. Please contact your Kenexa Support Team or Certified Workbench User for more information.

Language Customization of Event Attributes

If a client purchases more than one language for Event Manager and enables the System setting for Multilanguage, the clients can then customize event attributes (fields) during event and event template configuration. These client-translated event attributes are then used as language-specific message tokens when clients configure language-specific message templates.

> **Note:** The *only* automatically translated message token is the candidate schedule token [em-recip-sched]. This token is the only message token system translated.

The following event fields are language customizable during event configuration (new events and templates) for use in sending candidate communications using message tokens

- Event Name
- Event Date
- Event Description
- Event Location (only if "Other" is selected)
- Room Names
- Activity Names

> **Note**: Additional language values are *only* used in message tokens in messages sent to candidates. The main field value represents the value of the language of the user.

Clients can customize event templates containing the language-specific message token values for each purchased language. All message token values, except date and location, carry over to the new events created using the event template.

To configure an event using multi-language capability:

1. In the Event Summary screen, select **Action > New**.
   Events: New Events screen displays.
2. Select an event template or event configuration and if the event is a series or not.
3. Click **Continue**.
   The Events: New Event template displays with most event fields auto-filled with default values. Language customizable event fields display with a **+** sign. Click the **+** sign to expand each event field.

In the example below, the client has purchased Dutch and French in addition to English. All customizable event attribute fields are text fields, with the exception of the additional fields for the Event Date. The additional fields for the Event Date allow clients to type the corresponding event date format for each language. For example, US English candidates expect the MM/DD/YYYY format while French and Dutch candidates expect a date format of DD-MM-YYYY.
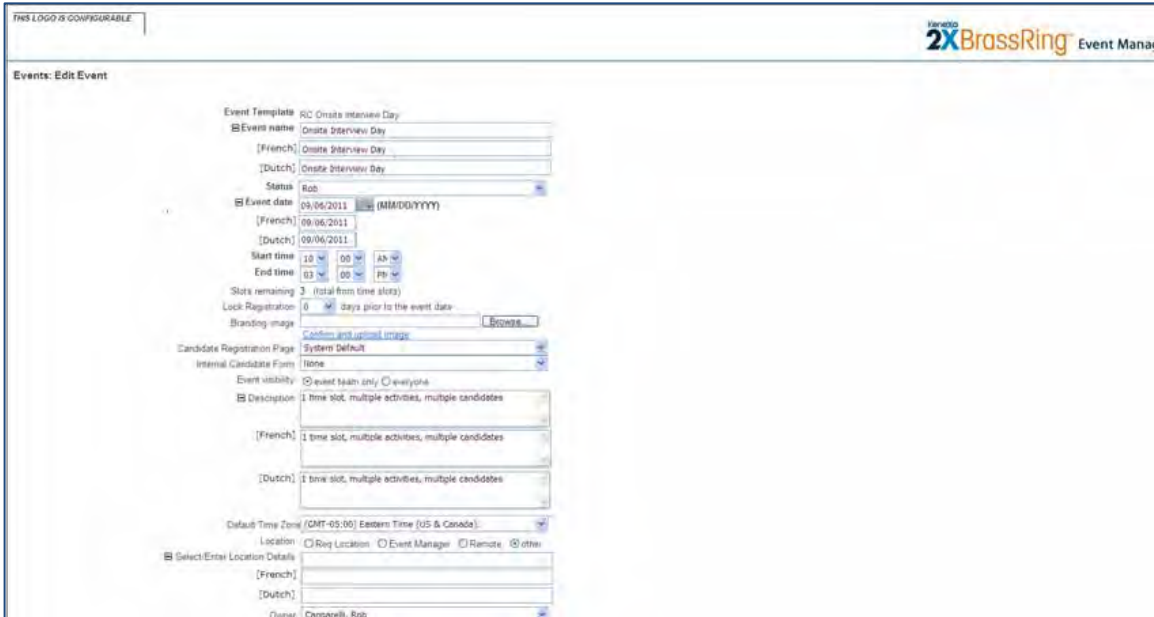
4. Client customizes the event name text field for each purchased language. For example, an English candidate would expect to see something like *On-Site Interviews* in this field. Client customizes the text field for French to *sur le site de l'entrevue.*
5. Client continues to customize each of the language fields, date, description, location, room, and activity.
6. Client clicks **Save**.

Only the primary value entered for each of these fields displays in any screen or drop down list containing the field. Any translated values entered in the additional language fields display only in candidate communication (message tokens and messages).

How Do Clients Get this Feature?

When an Event Administrator enables multi-language settings, no additional configuration is required.

Grouping of Candidates by Language

Clients can now use the language column to sort, group, and send communication to candidates.

> **Note**: It is the client's responsibility to compose language-specific communication templates. Event Manager does not translate content fields.

For example, with the language column enabled, 2xB users can view, sort, and group candidates by their language. In the following example, the client wishes to send an event invitation to their French speaking candidates.

1. 2xB user displays Unscheduled Candidate screen.

2. 2xB user clicks the Language column header to sort the candidates by language type.

3. 2xB user then selects the French candidates, and clicks **Send Invitation**.
   The Send Message screen displays.
4. 2xB user selects, completes, and sends the message template created for French candidates.

It is the user's responsibility to create the language specific message for each purchased language.

The only related functionality NOT controlled by the system setting is the language display on the View Candidate page.

> **Note:** On two views of the Candidate Search page, the language column replaces the Notes column due to space issues on the page.

How Do Clients Get this Feature?

When an Event Administrator enables multi-language settings, no additional configuration is required.

Language Feature Considerations

Event Manager only provides the ability to isolate candidates by language and allow users to send different messages with different message token values based on language. There is no validation that the message values entered match the specified language.

Event Batch Messages

Automated event messages triggered by event batches can also be configured for multi languages. For example, ABC Company has purchased English & CA French. If the user is English, then the main value in the message template fields will be sent to English candidates. If the user is French, each message template field can be expanded to configure a different message for CA French candidates.

Configuring Language-specific Event Batch Messages

If a client purchases multiple languages for Event Manager, enables multi-language functionality, and configures language specific event attributes, clients can then assign language-specific invitation, confirmation, and reminder messages when using Event Batches.

1. **Admin > List Maintenance > Event Batches > New/Edit Event Sequence.**

   Each message template displays with language customizable fields preceded by a **+** sign. Click the **+** sign to expand language selection for each template field.

2. Select a language-specific template for each language.
3. Click **Save** to save the Event Sequence.
4. Click **Save** to save the Event Batch.

How Do Clients Get this Feature?

When an Event Administrator enables multi-language settings, no additional configuration is required.

Best Practice Recommendations

Because each event can only be assigned ONE registration page, it is recommended to use the System Default Registration Page for events that need to support multiple candidate languages.

Miscellaneous

Other Event Manager enhancements include Event Schedule messages, Parallel Activity Group Types, and exporting event batch Job Code Default Data.

Event Schedules

Event schedule enhancements include more intuitive errors and warnings during event builds. The *Event Manager Schedule Messages* document located on the User Resource Center (URC) outlines commonly experienced errors and recommendations to correct those errors.

Parallel Activity Group Types

Parallel activities in Event Manager are those activities that occur simultaneously at an event within a specific period of time. Candidates sometimes must attend multiple activities (for example, multiple one-on-one interviews) or attend one activity within a specific time period. Using this functionality, administrators can configure an activity group type and Event Manager can then build schedules allotting sufficient time for the configured activity group type.

Event Manager functionality now includes the ability to define parallel activity types for candidate groups. Event Manager administrators can now create templates that define parallel activity group types. The two available parallel activity group types are:

- Individual candidate scheduled for all activities within a group
- Individual candidate scheduled for one activity within a group

For example, an administrator creates an event and wants to schedule the candidates to all activities within a group. There are three activities of 30 minutes duration each in this particular activity group. In order to accommodate the candidates, the schedule must allow for 90 minutes for each candidate to complete the three activities. When Event Manager builds the schedule, it automatically schedules sufficient time for each candidate and activity.

> **Note:** When configuring templates and events, do not place rooms, activates, or assessors in a locked state. Doing so may generate build schedule errors.

During event configuration:

1. Click the **+** symbol on the Parallel Activity Groups.
2. Select a time slot from the drop-down list box.
3. Click **Add**.
   The Group Name dialog box displays:

4. Enter the Parallel Activity Group name in the **Group name** textbox.
5. Select the radio button for:

   - Individual candidate scheduled for all activities within a group, **OR**

   - Individual candidate scheduled for one activity within a group

6. Click **Save**.
7. Proceed with event configuration.

Assigning Event Batches to Job Code Default Data (JCDC)

Job code default data consist of a list of job codes (unique IDs for the job), a standard job title and description, and additional standard requisition fields that are auto-populated across multiple languages and different requisition templates.

Job code default data for event batches can now be assigned to requisitions postings and imported through XML and Excel imports.

Gateway Questionnaires – Configurable Text Area Height

This feature reduces the scrolling necessary to navigate Gateway Questionnaires by making the height of text areas configurable for questions with field type "Text area."

Product RDP530 Rel 13.0	☑ 2x BrassRing ☑ Workbench Self-Service	☑ Talent Gateways
Visible Changes	☑ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	☑ Specific conditions required – see details below.	

Feature Description

Formerly, Gateway Questionnaire (GQ) questions with field type "Text area" had uniformly large text areas to accommodate long responses. A new setting allows your organization to set the row height for these GQ question text areas.This lets you reduce the scrolling that candidates must do to navigate the GQs.

How Do Clients Get this Feature?

This feature is controlled by a new GQ widget setting. Please contact your Kenexa Support Team or Certified Workbench User for more information.

Workbench Self-Service Certified Users

A new GQ widget setting, **Configure GQ question text area row height**, displays when you add a question widget (for a question with field type "Text area") to a GQ.

Tools > Gateway Questionnaires > Add new Gateway Questionnaire | Administer section/pages [for selected GQ] > **Administer widgets** [for selected page] > **Add | Edit widget**

1. On the Widget properties page, select Question.

2. For questions with field type "Text area," select a value for **Configure GQ question text area row height**.

- Numeric values from 1-30 adjust the response text area size, in rows, to the number selected. (Row height is consistent with the Talent Gateway display, e.g., landing page, search openings, job details.)

- **Default** displays the text area size as it does today using the existing number of rows (about 12 rows, depending on browser/font settings).

3. Click **Save** to save the widget.
4. Once the GQ is activated, you cannot edit field value, so click **Preview page** in the Actions toolbar to see the size of the text area box based on the number of rows you selected.
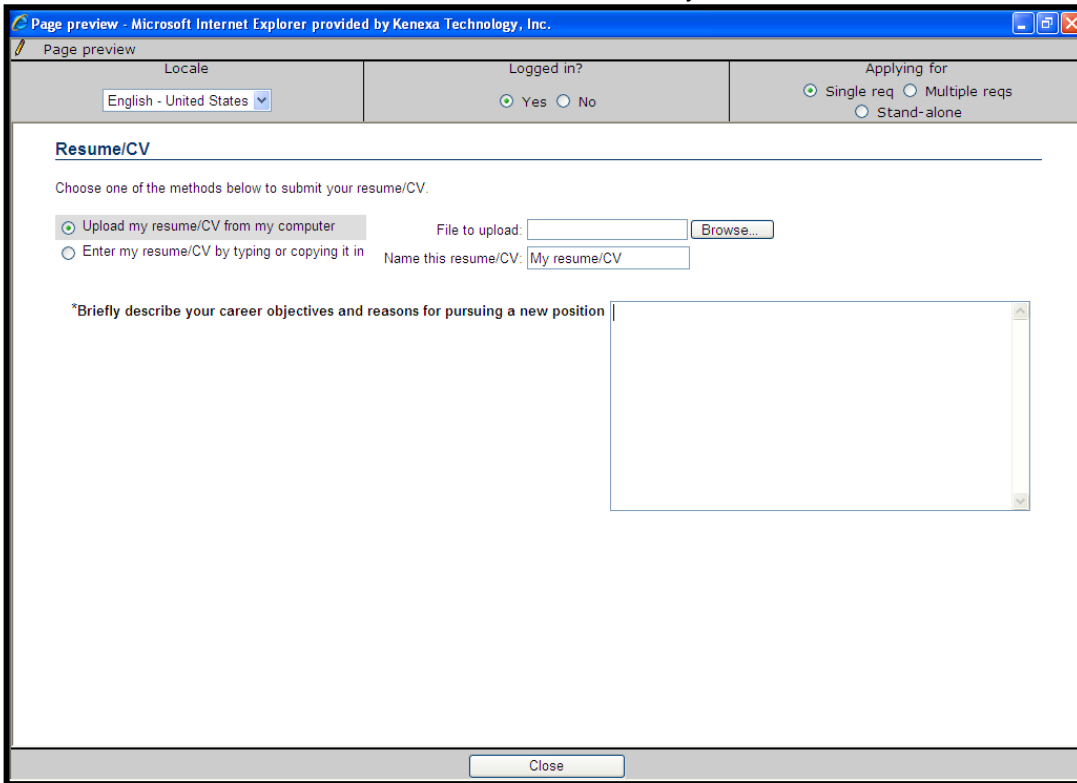
This setting does not affect row height of any pre-existing GQ's that were rendered before this setting was available.

When a candidate's entry in a text area box exceeds the visible display area, scrolling functions as it does today. As the candidate enters characters, the text wraps. A scroll bar appears on the right side of the text area box as necessary.

Known Limitations

This functionality applies only to candidate form questions (of text area type), as might normally appear for Question widget in GQ configuration.The following is out of scope:

- Adjusting the width of the text area field
- Adjusting the size of options or any type of field other than text area.

Gateway Questionnaires – Disabling Pre-filled GQ Fields

This feature adds a Gateway Questionnaire (GQ) option to disable pre-filled responses to selected GQ fields at the GQ question widget level. GQ fields are often time and context sensitive and should not pre-fill from one job application to another. Configuration of this feature does not affect auto fill form fields.

Product **RDP528 Rel 13.0**	☑ 2x BrassRing ☑ Workbench Self-Service	☑ Talent Gateways
Visible Changes	☑ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	☑ Configuration required – contact your Kenexa Support Team for implementation details.	

Feature Description

This feature adds a Workbench setting to indicate which GQ question widgets should not be pre-filled. Configuring the "Disable pre-fill responses" checkbox ensures that any previously answered GQ question widgets are not pre-filled when a candidate accesses the question again. The Disable pre-fill checkbox is available for all GQ widget questions, including Gateway form questions, contact information fields, and code fields.

When a candidate re-accesses a completed question, pre-filled responses are cleared if the "Disable pre-fill response" checkbox has been checked in GQ question widget settings. This includes using the Previous button to get back to the question.

Configuration of this feature does not affect auto fill form fields. Candidates can use the Save as a draft feature but content within GQ question widgets enabled with this feature is not saved.

Candidate Experience

When this feature is enabled, each time the candidate accesses the particular GQ page, any previously answered responses are not pre-filled for the selected questions. The candidate must re-enter the fields. The candidate does not see any pre-filled responses for the applicable questions.

1. Candidate completes the questions on the GQ.

2. Candidate encounters the question again on the GQ page either upon application to a second job with the same question or by using the Previous button to get back to the question.

The candidate does not see any pre-filled responses for applicable questions as all pre-filled fields are cleared.

Limitations and Known Issues

When this feature is enabled, candidates can use the save as a draft feature but content within GQ question widgets enabled with this feature is not saved. Every time a candidate accesses a completed GQ with that question widget, all pre-filled responses are cleared and content must be re-entered.

How Do Clients Get this Feature?

A new Workbench GQ question widget setting controls this feature. Please contact your Kenexa Support Team or certified Workbench Self-Service user for more information about enabling this feature.

Workbench Self-Service Certified Users

In WB:

1. **Tools > Gateway Questionnaires > Administer Sections/Pages > Administer Widget > Edit widget** [question type widget]**.**
   The GQ Questions Widget dialog box displays.
2. Click the **Disable pre-fill response** checkbox.

3. Click **Save**.

Gateway Questionnaires – Validation Message

This feature allows your organization to add a customizable validation message to Gateway Questionnaire pages, requesting candidates to review or verify their responses before continuing to the next page.

Product RDP506 Rel 13.0	☑ 2x BrassRing ☑ Talent Gateways	☑ Workbench Self-Service
Visible Changes	☑ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	☑ Specific conditions required – see details below.	

Feature Description

Your organization can now add a customizable validation message to Gateway Questionnaire (GQ) pages, requesting candidates to review or verify their responses before continuing to the next page of the GQ.

Candidate Experience

A new setting at the GQ page level indicates whether that page should prompt candidates to verify their responses. When it is set for a page, two things happen when candidates first click the Next or Submit button:

- Validation message displays at the top left of the page
- Candidates are returned to the top of the page where they can view it.

The following figure shows sample placement and format of the message that candidates see. (However, since many fields on your TG are customizable, and you can also customize this validation message, this text and location may not be exactly what your candidates see.)
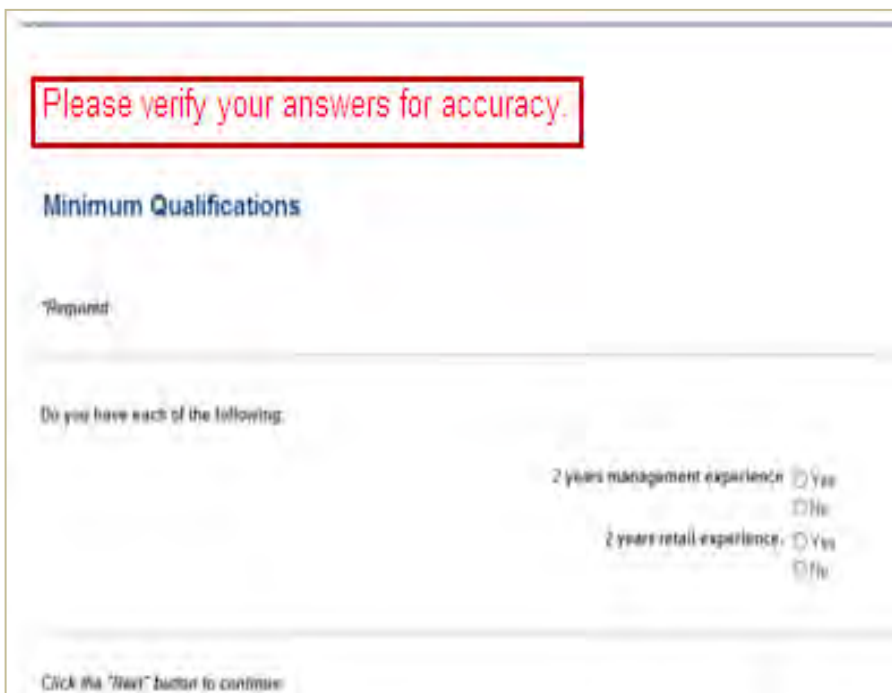
Clicking any other button on this page (Previous, Close, Save as draft) will not display the prompt.

To process the page and move to the next one, candidates scroll through their responses and click the Next or Submit button again.

How Do Clients Get this Feature?

This feature is controlled by a new GQ setting and new TG text customization field. Please contact your Kenexa Support Team or Certified Workbench User for more information.

Workbench Self-Service Certified Users

To enable this feature, you:

- Check a setting at the GQ page level to indicate whether that page should prompt the candidate to verify their responses and return them to the top of the page.
- Optionally customize a validation message, at the TG level, that will be displayed in the prompt.

GQ Setting

1. Select **Tools -> Gateway Questionnaires -> Administer Sections/Pages** -> [page selection].
2. Select a page with a Next/Submit button and click Edit properties icon.
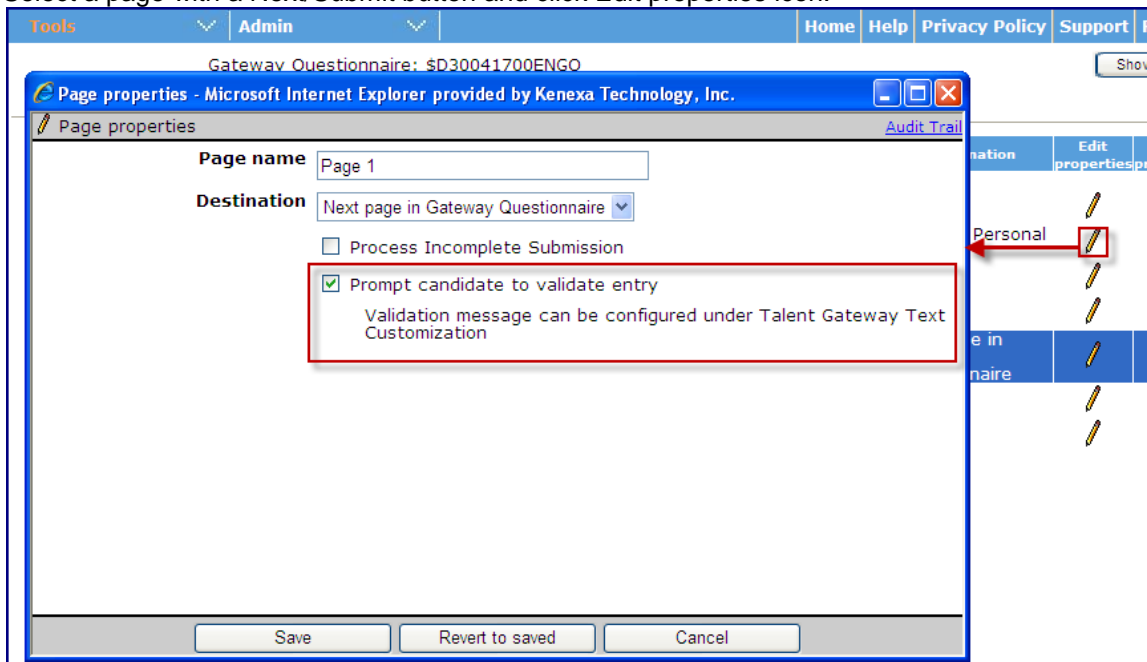
3. Check the **Prompt candidate to validate entry** property and Save.
4. Repeat for any other desired pages.

When this property is checked, candidates will be prompted to review their responses and are returned to the top of the page when they click the button to move to the next page of the GQ. You can customize the prompt using Workbench Talent Gateway text customization.

TG Text Customization

You can customize the validation message that will be displayed in the prompt.

1. Go to: **Tools -> Talent Gateways -> Text Customization -> Edit** [selected TG] -> **Notifications** Tab.
2. For **Gateway Questionnaire page validation message (if configured)**, edit the default text as desired. The default text is "Pease review your responses for accuracy." You can enter up to 200 characters, and HTML is accepted for color and font formatting.

ts	Restricted access	Saved drafts	Additional information	Notifications	Event Manager	Candidate portal	Communications History	Privacy policy	Inactivity time-out	Web tracker

Assessment System busy page message:
Reset to default

```
<b>The system is currently
experiencing a delay.</b><br><br>We
apologize for the inconvenience.
Please <a href="[AssessmentURL]">click
here</a> to retry.<br><br>If you
continue to receive this message,
```
Show me

Assessment System is ready e-mail subject line:
Reset to default

Your [JOBSAPPLIED] application

Assessment System is ready e-mail message:
Reset to default

```
[FIRSTNAME] [LASTNAME],<br><br>The
Assessment System is now ready for you
to complete your application process
for the [JOBSAPPLIED]
position.<br><br>Please <a
href="[AssessmentURL]">click here</a>
```

Gateway Questionnaire page validation message (if configured):
Reset to default

```
<font color="red" size="+1"><b>Please review your
responses for accuracy.</b></font>
```
Show me

[Save]   [Reset to Saved]   [Cancel]

Integrations – Internal Background Check Tool Validations

The following Background Check vendors have been validated by a new Common Service Integration back-end tool, designed for easier integration with background check vendors:

- Asurint

All are available to clients as background check vendors.

Product RDP581 Rel 13.0	☑ 2x BrassRing	☑ Integrations
Visible Changes	☑ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	☑ Configuration required – contact your Kenexa Support Team for implementation details.	

Integrations – Assessment Email Sent on Submit

This feature sends candidates an email assessment invitation from the confirmation page when a candidate selects Submit.

|	
Product RDP564	☑ Assessments Inte
Visible Changes	☑ No – requires specific conditions / configuration for visibility.
How do I get this feature?	☑ Automatic – see details below.

Feature Description

This feature modifies when an email assessment invitation is sent to a candidate. The invitation is now sent from the confirmation page when a candidate selects Submit. Formerly, email assessment invitations were sent when, and if, candidates selected Next on the confirmation page or clicked the assessment link (based on the client's configuration).

There is no change in the User Interface (UI).

How Do Clients Get this Feature?

No configuration is required for this feature. It is available automatically for all clients using the Kenexa Assessment integration configured to send assessment email invitations as part of the job application flow.

Integrations – Assessment Lifespan Based on Score

This feature provides a way to base an assessment's lifespan on scoring thresholds. Lifespan is defined as the period of time (number of days) assessment results are valid. When lifespan based on score is configured, if an applicant's assessment score falls within the configured minimum to maximum banding range and the date of the assessment is less than the number of days configured in the lifespan based on score value, 2xB copies the valid, existing assessment result to the requisition. If no valid assessment exists, the candidate will be prompted to complete the assessment. Clients can configure up to ten instances of assessment lifespan based on score.

Product LDP058	þ 2x BrassRing þ Integrations – Assessments
Visible Changes	þNo – requires specific conditions / configuration for visibility.
How do I get this feature?	þ Configuration required – contact your Kenexa Support Team for implementation details.

Feature Description

This feature uses an applicant's assessment score and date to determine the lifespan for individual and batch assessments. Two criteria must be met in order for the assessment lifespan based on score to take precedence over any existing lifespan values. One, the applicant's assessment score must fall within the minimum to maximum banding range; and two, the date of the assessment must be less than the number of days configured in the lifespan based on score value.

For example, if an applicant's assessment score falls within the predefined minimum to maximum banding range of the lifespan based on score and the date of the request is less than or equal to the lifespan value (number of days) set in the lifespan column, the lifespan based on score number of days value overrides the default lifespan setting. If one of the two criteria is not met, a new assessment link is generated for the candidate. If there is more than one valid assessment on file, 2xB copies the most recent assessment. If no valid assessment exists, the candidate will be prompted to complete the assessment. Clients can configure up to ten instances of assessment lifespan based on score.

2x BrassRing Admin/Admin+

2xB Admin+ users can edit and view the assessment lifespan based on score configurations for individual requisitions and for batches. The following screenshot depicts the new banding screen with the lifespan column configured.
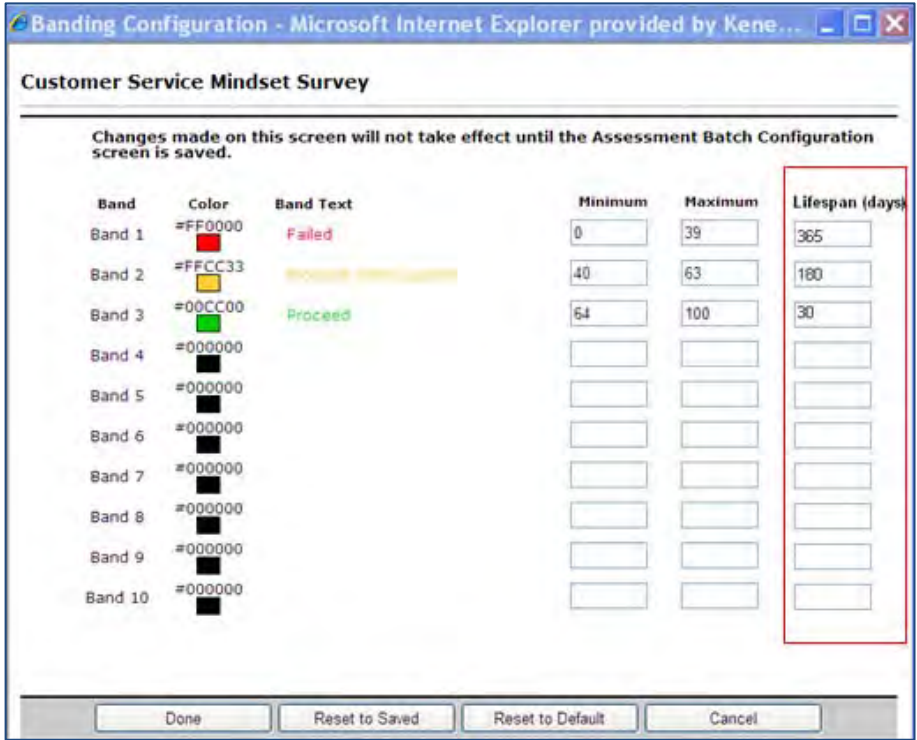
2x BrassRing Users

2xB users can edit and view assessment lifespan based on score configurations for individuals requisitions and for batches if their user privilege permits it. The following screenshot depicts a view only of the new banding screen with the lifespan column configured.

Assessment Lifespan Based on Score │ 2
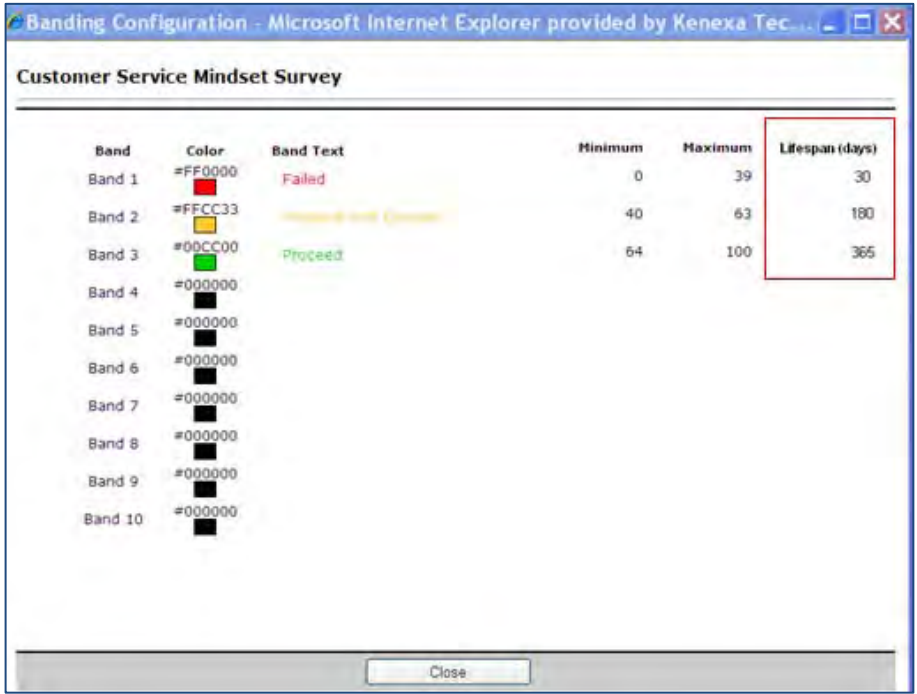
Limitations and Known Issues

Feature	Explanation
Default Banding Configuration	This does not tie back to the assessment.
Overall Banding w/in Batch	This does not tie back to an individual assessment, lifespan is determined on a per assessment basis.

How Do Clients Get this Feature?

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

Kenexa Tasks

The Assessment Lifespan can be configured for individual and batch assessments. Configuration instructions follow.

Workbench

To configure Assessment Lifespan for assessments:

1. In WB Select **Tools -> Integrations > Assessments**.
   The Assessment Administration screen displays.
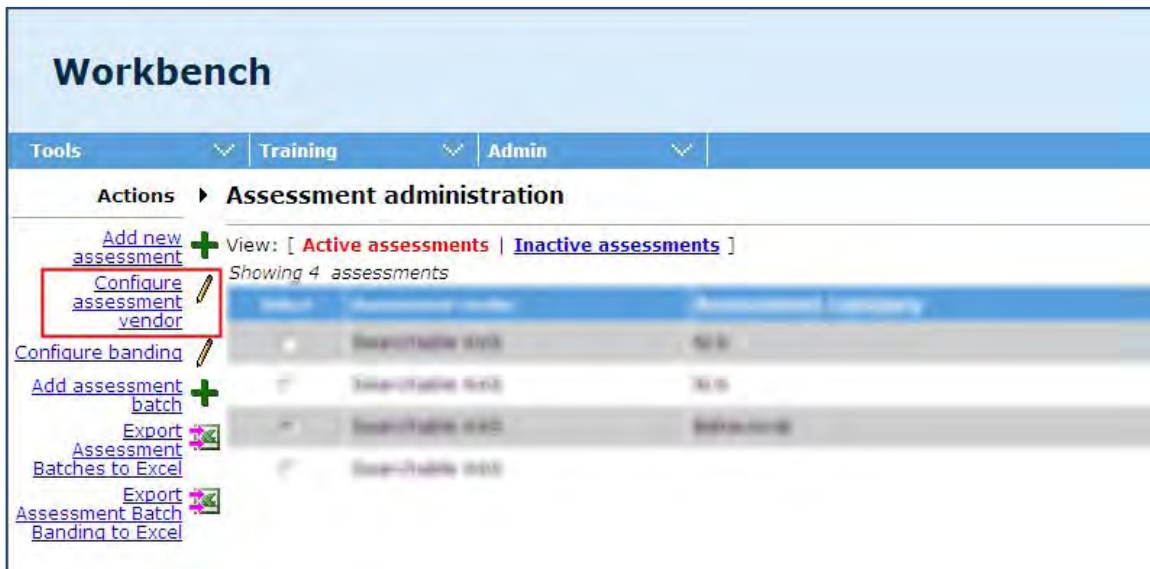
2. Select an assessment if necessary.
3. Click **Configure Assessment Vendor**.
   The Configure Assessment screen displays.

| | **Note:** Once the Set Lifespan checkbox is checked, it cannot be unchecked if there is any transactional requisition data present. A maintenance request is necessary to return the Lifespan setting to its default state (unchecked). |

4. Select **Set Lifespan at Assessment Level** checkbox.
Selecting this checkbox adds an additional column to the Configure Banding Score screen.
5. Click **Save**.
The Assessment Administration screen re-displays.
Select **Configure Banding.**

The configuring banding screen displays the Assessment Lifespan column.

> **Note**: If you are configuring a batch assessment, "Overall Banding" within a batch is out of scope.

6. Enter numeric score values into the **Minimum** and **Maximum** fields for each of the three banding values.

7. Enter lifespan numeric values in the **Lifespan (Days)** numeric field box for each of the three banding values. The field accepts five numeric characters.

> **Note**: If the Lifespan (Days) field is left blank, the default lifespan set in the Configure Assessment Vendor screen takes precedence.

8. Click **Save**. The Assessment Lifespan Based on Score configuration is saved.

Integrations – Assessment Versioning

For clients with Kenexa Assessments, new versioning logic rectifies situations where minor updates to an assessment sometimes resulted in candidates who already had results on file being required to retake the assessment.

Product RDP556 Rel 13.0	☑ 2x BrassRing	☑ Kenexa Assessments (KAS)
Visible Changes	☑ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	☑ Automatic – see details below.	

Feature Description

An automated synchronization process between Kenexa Assessments (KAS) and 2xB populates your list of available assessments. Occasionally, minor modifications to an existing assessment require a new ID for the updated assessment. Formerly in such cases, 2xB did not recognize that the new ID is equivalent to the old ID, so prompted the candidate to take the assessment again even if valid results were on file.

To rectify this, the assessment synchronization process has been enhanced with versioning logic when assessment names match but IDs do not. When a new ID is provided for an existing assessment during synchronization between KAS and 2xB, the following occurs:

- Existing assessment in 2xB is inactivated, and the new assessment version is added to the client's list of assessments
- Existing assessment name is appended with "[Archived]"

The archived version is no longer available for selection when users create a new batch or use the Run/Retake Assessment functions, but is respected for existing requisitions and batches that have the archived version associated to them. The original ID is requested in any call to KAS to ensure that all candidates within the requisition have a consistent experience.

Re-using Results with Versioning

When an assessment is required of a candidate, 2xB now checks to see if there are results for the specific assessment ID *as well as* for the IDs of any assessments bearing the same name but appended with "[Archived]." If valid results for either ID exist, the candidate is not required to retake the assessment.

How Do Clients Get this Feature?

This feature is available automatically without configuration for clients using Kenexa Assessments (KAS).

Kenexa Tasks

Workbench

Tools > Integrations > Assessments > Edit [selected assessment]

For an archived assessment, the Assessment name field becomes read-only in Edit mode, as shown below. Hover text on the field displays: "The Assessment name must be changed by KAS team."

Integrations – Avature CRM

A standard integration with 2x BrassRing allows clients using Avature CRM to share data between systems for a more comprehensive view of the sourcing and hiring status.

Note: Clients must have their own relationship with Avature, Kenexa has only a technical partnership with Avature, we do not have a business partnership.

Product RDP526	☑ 2x BrassRing	☑ Integrations
Visible Changes	☑ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	☑ Configuration required – contact your Kenexa Support Team for implementation details.	

Feature Description

Key features of the 2xB integration with the Avature CRM are:

- Avature panel is available within 2xB.
- Users are automatically authenticated into Avature, no dual logins to maintain.
- Avature "People" can be exported into 2xB.: requisitions, working folders and/or contact.
- 2xBrassRing candidates can be exported to Avature.
- Associated individuals' records will have a visible indicator with link to open other system's record.
- Avature Jobs can be automatically created based on 2xB requisitions.

2xB User Experience

Automated authentication provides seamless access, and the new CRM panel provides a quick view into Avature activity, along with easy access into the application.
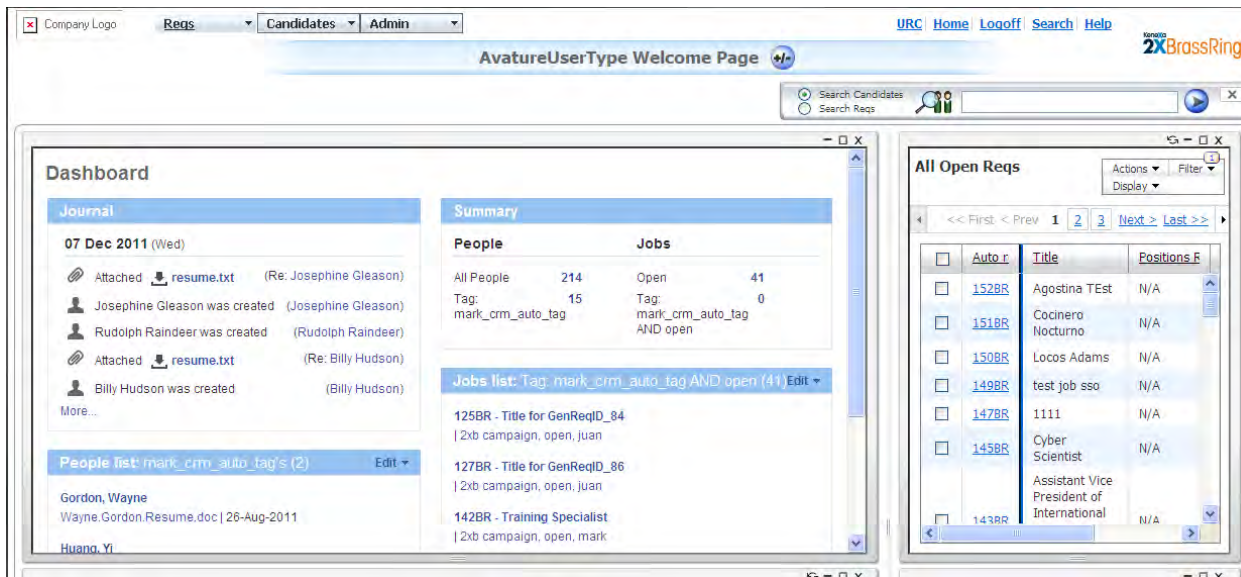
Users create an Avature Job (campaign) based on 2xB requisitions in Open, Approved, or On hold status, via the "Manage Campaign" action. The Campaign can be created from the View req page or from within the req from the dashboard.
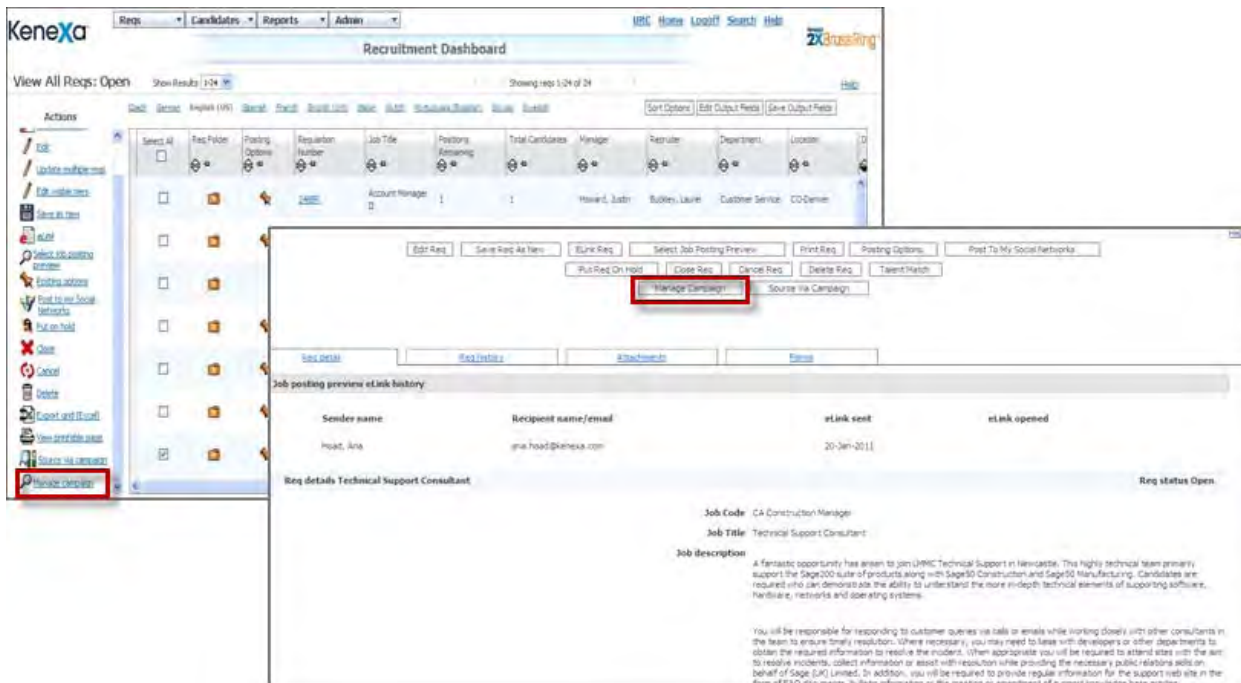
Note: Users cannot create a campaign if the requisition is at Pending, Declined, or Deleted status.

Manage campaign opens a new window that displays the Avature Job window, with the details that have been imported from 2xB. The **Name**, **Job Title,** and **Job Description** standard requisition fields are automatically populated on the new campaign record, and all "Apply URLs" are also added to the campaign.
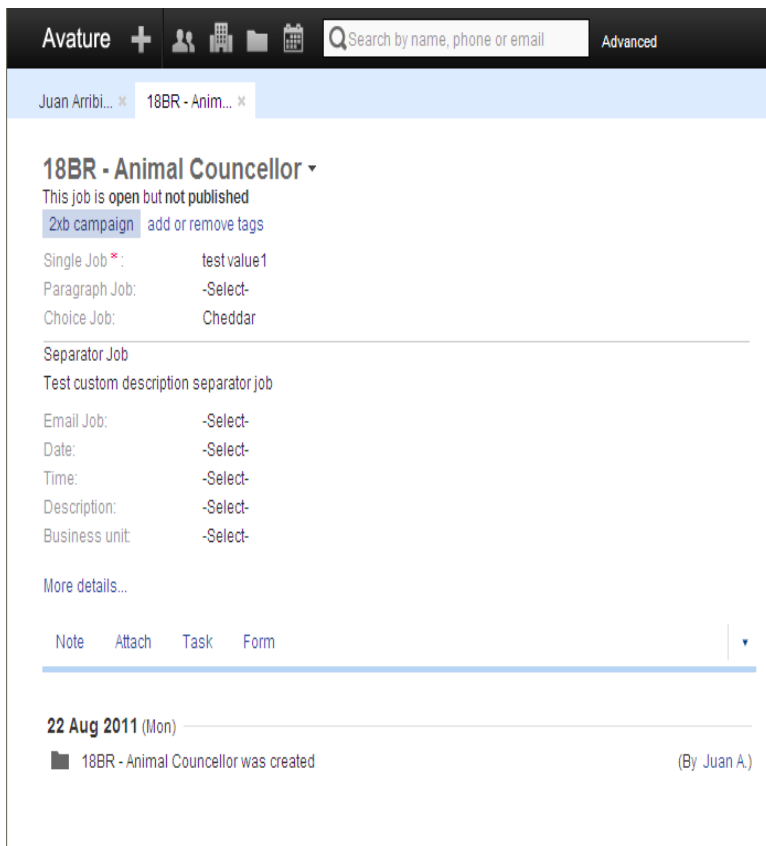
To source candidates for a specific requisition, click the **Source via campaign** action.
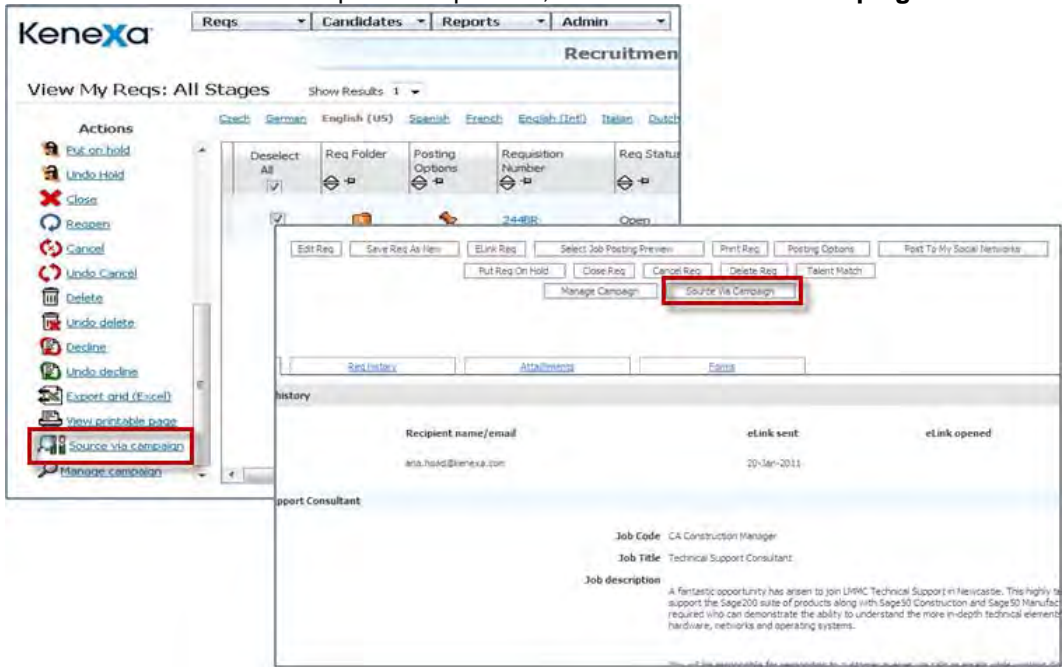
The Avature dashboard opens in a new window.
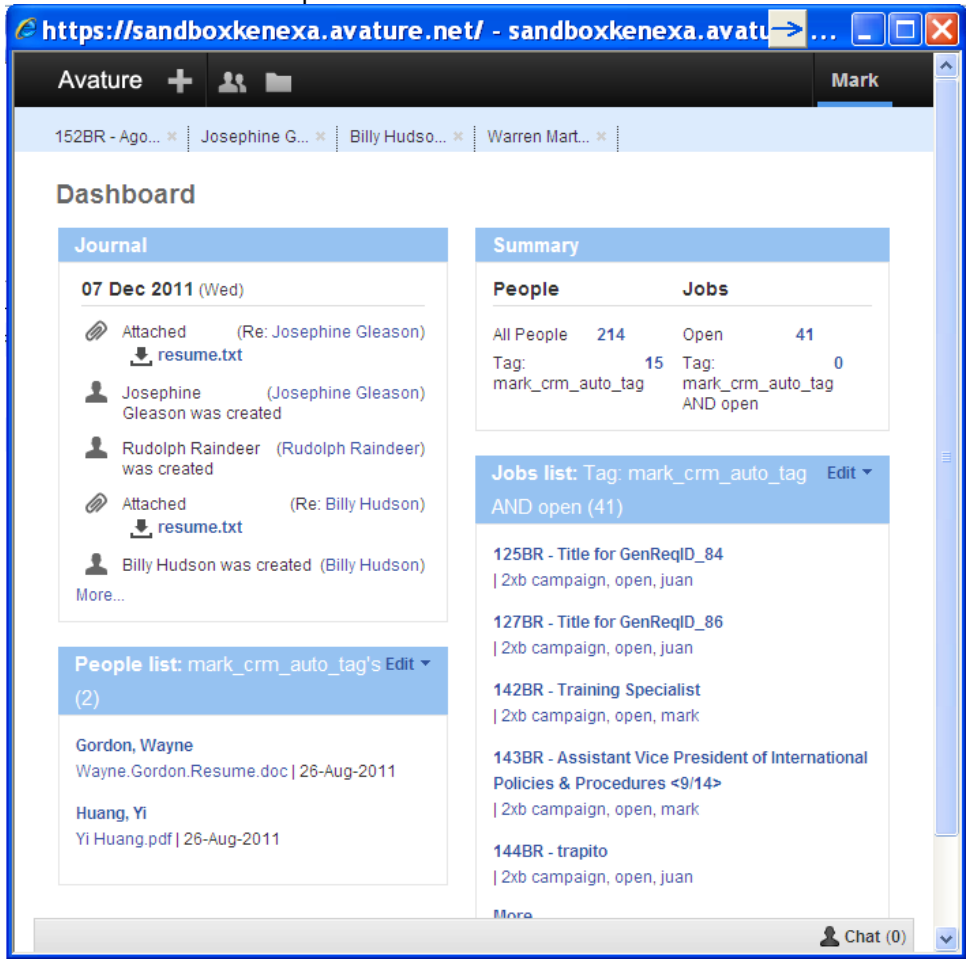
Users can export Avature People into a 2xB: requisition, working folder and/or contact. Select which requisitions or working folders the individual should be moved into at the prompt.
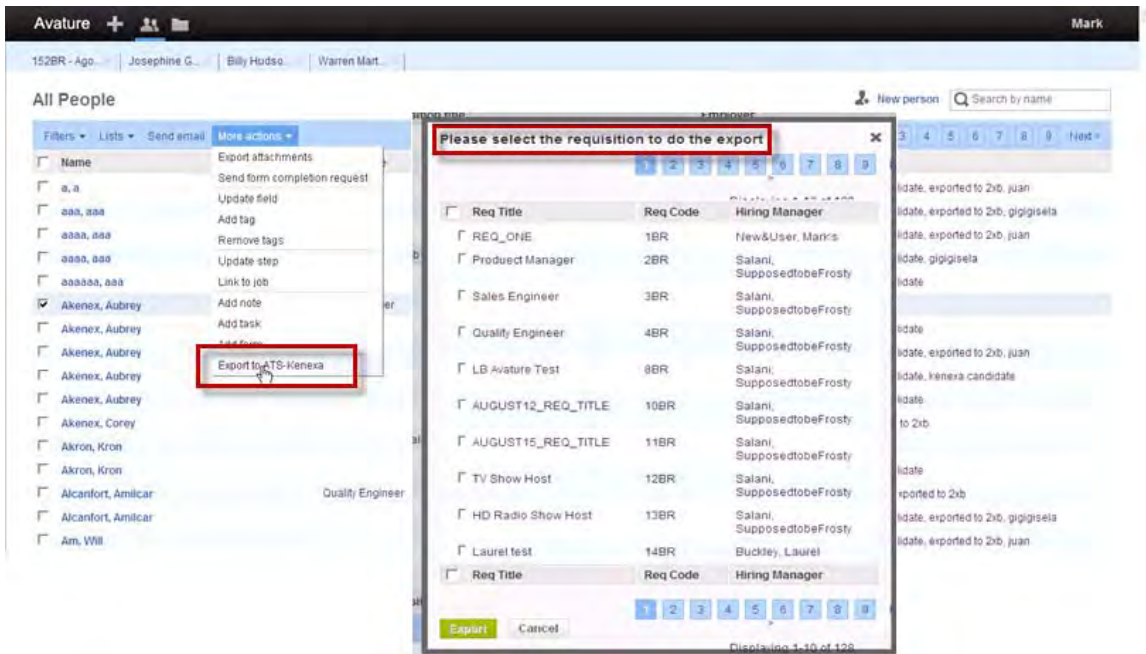
Users can likewise export 2xB candidates into Avature CRM. This option is available from both the candidate list view and from the Talent Record Action list.
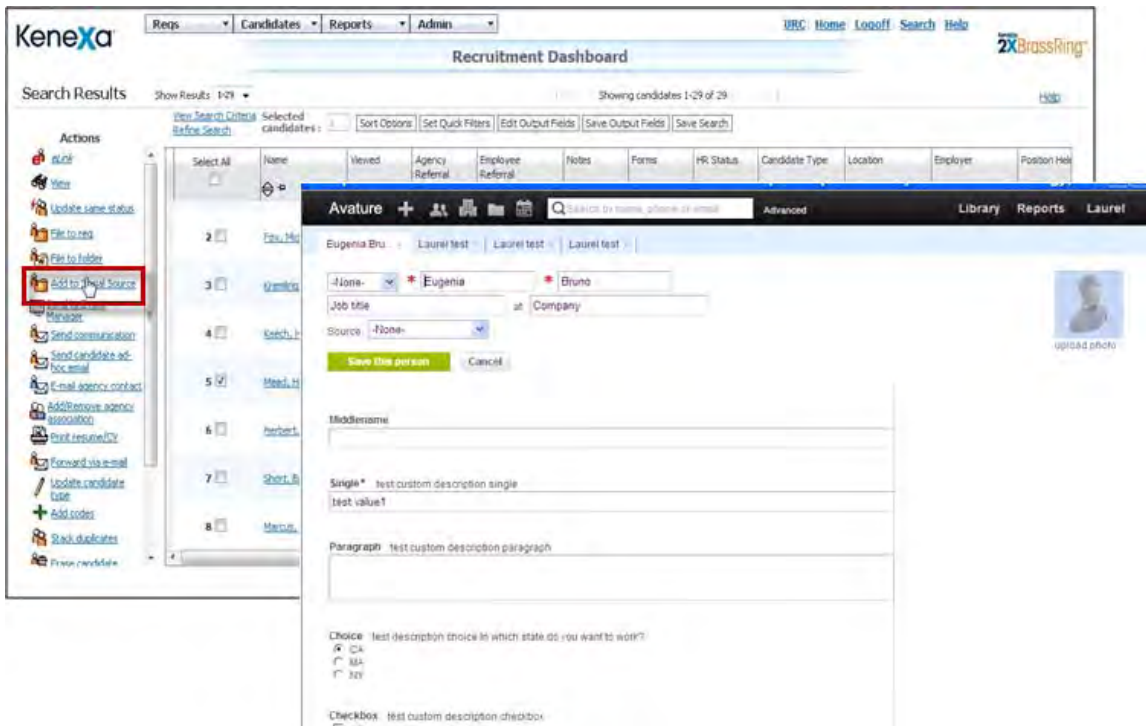
Linked Records provide easy means to access details in opposing system.
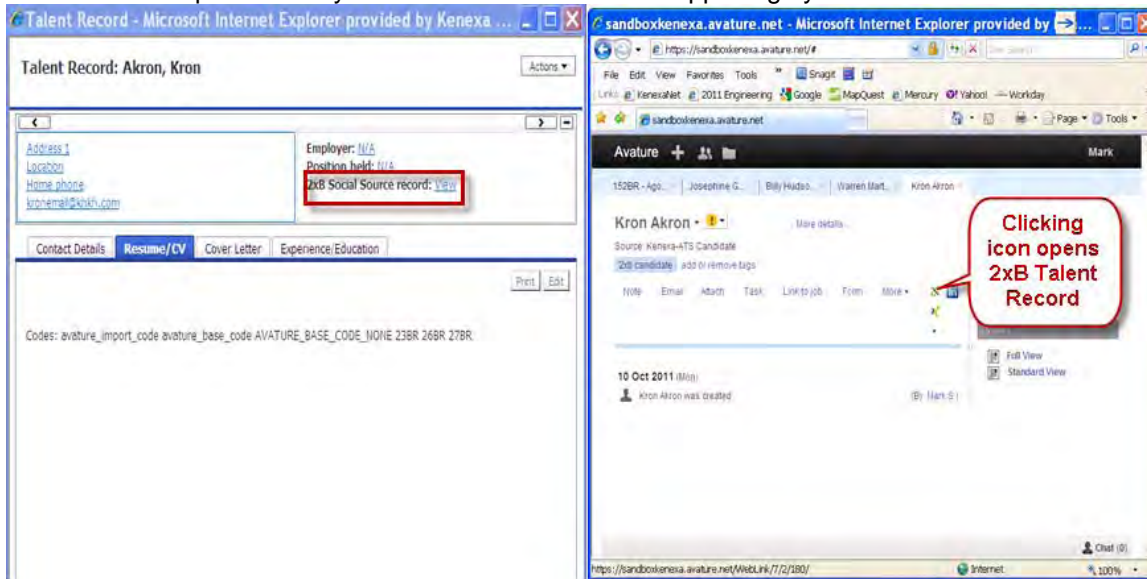
How Do Clients Get this Feature?

There are additional fees for this integration, which is controlled by a new client setting and requires clients to have their own relationship/account with Avature. Please contact your Kenexa Support Team for more information about enabling this feature.

For additional information on the integration touchpoints, refer to the *Kenexa 2x BrassRing and-Avature CRM Integration User Guide* posted to the URC, found under the 2xB Release Info tab on the "Other Documents" page.

Workbench Self-Service Certified Users

Self-service users can perform some ongoing setup tasks after the Avature CRM integration has been implemented for your organization:

- Manage user type privileges used with Avature CRM

- Map the CRM panel for New UI users

- Add the CRM Record field to the Talent Record Ribbon

Manage User Type Privileges

Three user type privileges are managed in:

Tools > Users > User types > Edit type permissions [for selected user type] > **Integration**

The privileges are:

- CRM – copy candidates to CRM

- CRM – general search

- CRM – manage campaigns/source from campaign
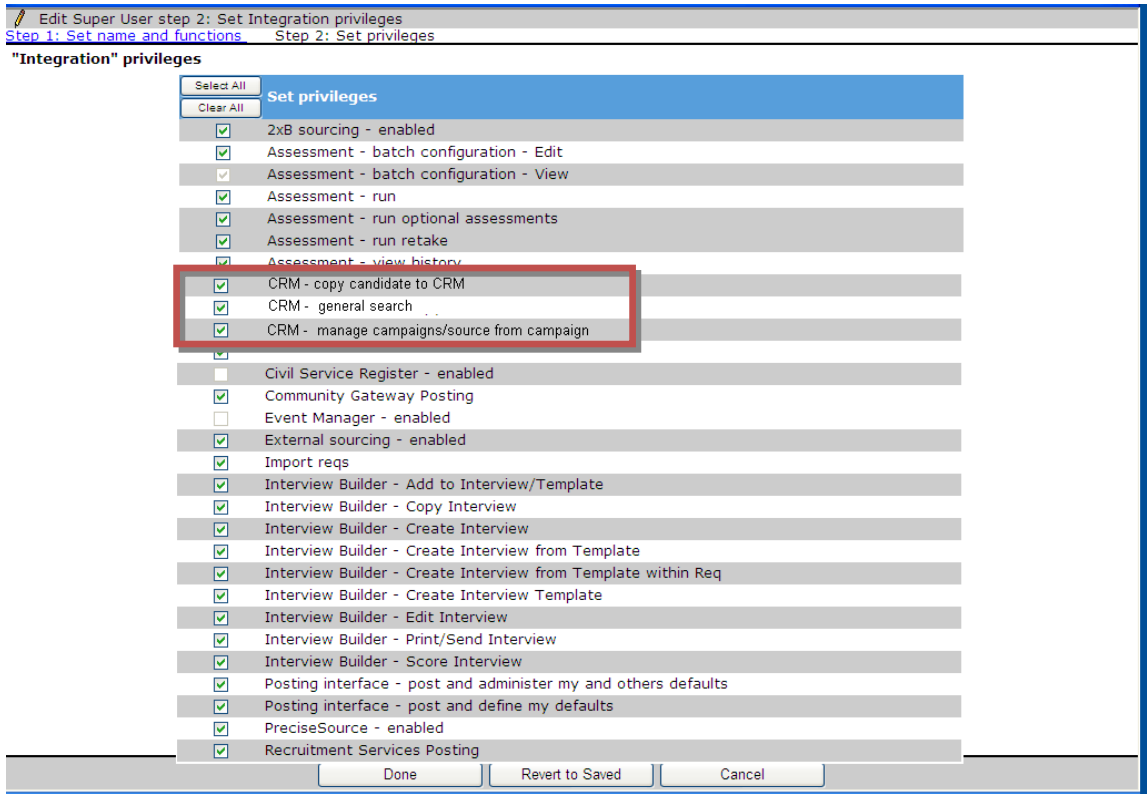
Map New UI Panel

Tier 4 certified users can map the CRM panel for New UI users:

Tools > Users > User types > [select user type] > User type panel mapping
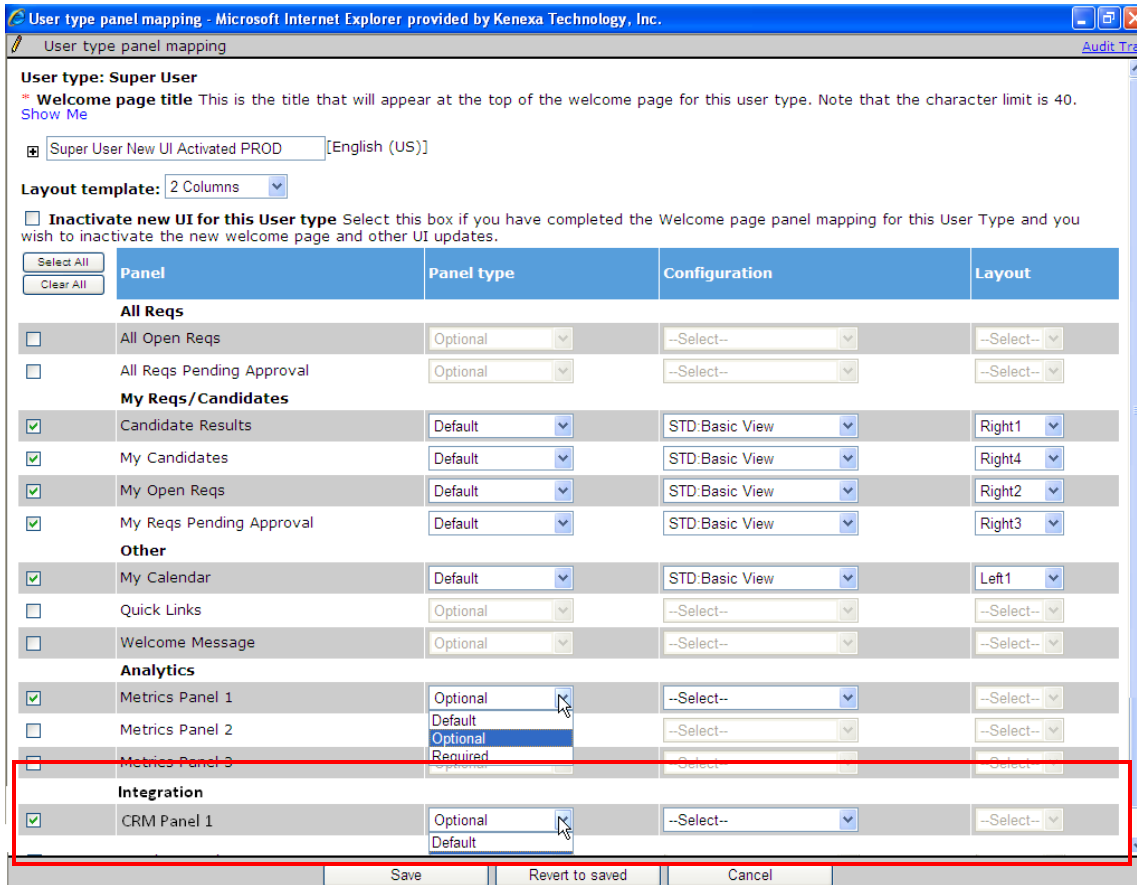
Choose desired options and **Save** the mapping.

Update New UI Ribbon Configuration

You can add the **CRM Record** field to the New UI Talent Record:

1. Select **Tools > Users > User Types >** [Select User type] **> Screen display defaults**.

2. For the **Ribbon** in the **Talent Record** section, locate the pane to which you want to add the CRM Record field – maximum of four per pane.

⊟ **Talent Record**

☐ **Activate new Talent Record for this User Type** Select this box if you wish to activate the new Talent Record for this User Type only ("Apply this configuration to other User Types" selections will not be affected by this setting).

Ribbon

☑ Allow users to edit display

Show Me

[Add Pane]

Pane Number: 1 ▾   [Delete Pane]

#	Actions	Selected field	
1	▼	[Applicant Master] Address 1	[Select field]
2	▲ ▼	[Applicant Master] Location	[Select field]
3	▲ ▼	[Applicant Master] Home Phone	[Select field]
4	▲	[Applicant Master] Email	[Select field]

Pane Number: 2 ▾   [Delete Pane]

[Save]   [Reset to default]   [Cancel]

3. Click **Select field.**

---
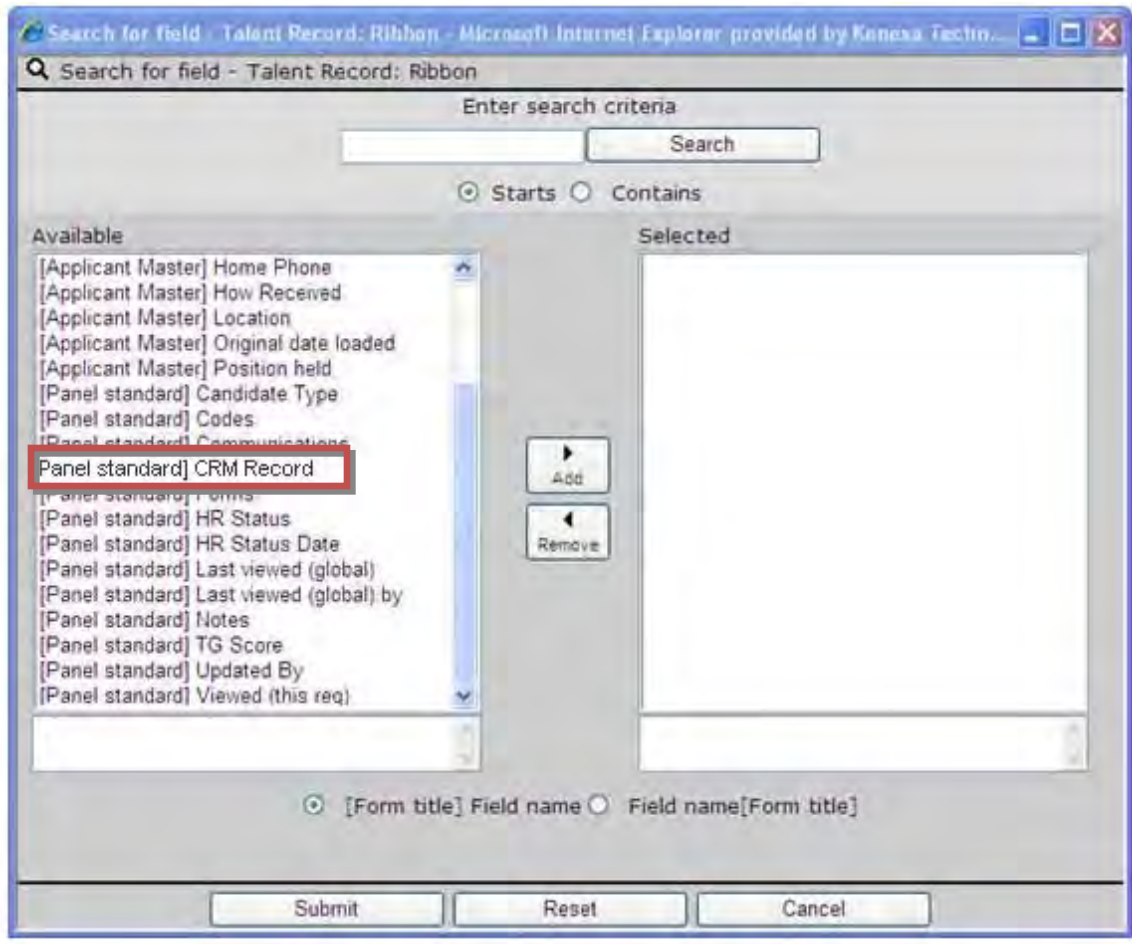
4. Choose Panel standard CRM Record field, click **Add**.

5. Click **Submit**.

Kenexa Tasks

There are multiple steps required to configure the Avature Integration. They are included here for convenience for Release 13.0, but any updates to the process would be included in the *Avature Integration Steps* document posted in the Social Source folder on the Launch site. A copy of the *2xB-Avature Integration User Guide*, describing the integration touch points, is also located there (and on the URC for clients).. along with a User Guide

Setup for 2xB -> Avature

1) Request new client creation. Send email to Florencia Maurizi <florencia.maurizi@avature.net> XXX requesting a new client set up. Provide 2xB Client ID, and client name in the email. Include whether staging or production.

2) AVATURE will create a new client and reply back to email once this is complete. Included in the email will be the following: AVATURE Account Name (Short Client Name), Service User Name, Service User Password, Service URL. Once the client is created you may begin configuring the User Roles within AVATURE (these will need to be mapped to 2xB User Types in a future step).

3) Create a Project ticket then and a Work Ticket off of that and assigned to Queue – Engineering with the Type of Maintenance. This should then be reassigned to Galina Slastenko. Include in the ticket all the data that was provided by AVATURE.

4) Turn on 2xB client setting. Create a manifest for the AVATURE candidate import (the manifest name will need to be provided back to AVATURE). Create new Source Code and Import Code to be used for AVATURE: Settings>Codes>Source Codes. (All source codes sent from AVATURE will be pre-pended with this Source Code.) Request Integration User EmployeeID from engineering (Galina Slastenko) Provide Integration User EmployeeID , the manifest name, source code and import/vendor code (may create new or use existing) to AVATURE via email.

To create codes: WB>Tools>Settings>Code Types

1) *Create new code type = Import (assuming you don't already have this code type)*

2) *Create new Import code to identify that a candidate came from CRM, e.g "CRM" or "AVATURE". This will show as a code attached to the candidate.*

3) *Create new Source code, similar to Import code, this should be something that helps identify where the candidate came from. It must differ from Import code.*

To create manifest: WB>Tools>Integration>Administration

1) *If there is no Integration Type = "Candidate Import" then Add Integration Type, select Candidate Import*

2) *Once available, then under subscription admin: add subscription.*

   a. *Subscription name and Manifest name should match. You can have up to 2 underscores, ex: "AVATURE_CANDIDATE_UPLOAD"*

   b. *Select desired stacking logic*

   c. *May set attachment category if desired*

   d. ***Check the "CRM Import" checkbox**.*

5) Update maintenance ticket with User Type mapping information: 2xB User Type A should be given AVATURE User Role X. (User Type A = User Role X). You only need to include 2xB User Types which will be given access to AVATURE. Notify Galina Slastenko on update.

6) Complete 2xB configuration steps.

Enable client setting:

Note: at this time there is only "First Advantage" client setting, however, it is determined at the database level which CRM vendor the integration is with so, it's ok to use this even when the integration is with Avature.

Turn on User Type privileges:

Tools > Users > User types > Edit type permissions [for selected user type] > **Integration**

The privileges are:

- CRM – copy candidates to CRM

- CRM – general search

- CRM – manage campaigns/source from campaign

Map New UI Panel

Tools > Users > User types > [select user type] > User type panel mapping

Update New UI Ribbon Configuration

WB>Tools>Users>User Types>Screen Display Defaults

Details on Apply URL

When this is checked. The Apply URL is created in the Campaign in the First Advantage system.

Integrations – HireVue Video Interviewing

HireVue is a Kenexa integration partner that provides virtual interviewing services – video interviews. The integration with 2xB adds the ability to schedule a video interview and capture the status in the candidate's 2xB Talent Record.

Product RDP580	☑ 2x BrassRing	☑ Integrations – Video Interviewing
Visible Changes	☑ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	☑ Configuration required – contact your Kenexa Support Team for implementation details.	

Feature Description

HireVue is a Kenexa integration partner that provides on-demand digital interviewing services – video interviews. They use secure, browser-based technology, allowing your organization to send standardized questions to candidates and let them record responses via webcam. Then you can watch, rate, and share the candidates you want, on your own time. This minimizes time and travel costs associated with early stage interviews, and removes the inconveniences of scheduling.

You can initiate the video interview via 2xB with a status change, choose the interview template or specific questions, and link back from the candidate's 2xB Talent Record to view and rate the interview.

2xB User Experience

The process is triggered when the 2xB user updates a candidate to the "designated" HR Status, from within a req folder for a "designated" req template. (Both req template and HR Status are designated in the configuration setup for theHireVue candidate export subscription.)

The system requests the video interview for the candidate, authenticates and redirects the 2xB user automatically to the HireVue user interface in a separate window. The system also passes the available candidate information to HireVue (which is possible through the mapping configuration done at implementation time).
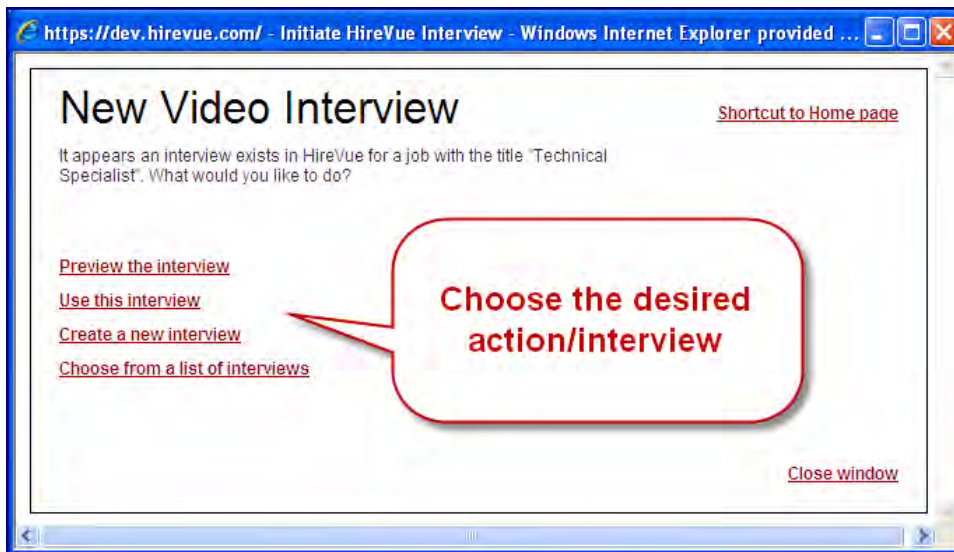
In HireVuew, you select the interview template or specific questions by stepping through the screens, and log out to return to 2xB.

The basic status and results are updated within the configured 2xB standard candidate form once HireVue returns them. You can access the candidate's form from the candidate grid of the req folder or from the candidate's Talent Record. The candidate form will include a hyperlink with text, "**Click here to view the results**."

Integrations – HireVue Video Interviewing | 2

Click the hyperlink to view the candidate's video, and to rate and share it.

More Information

You can visit the HireVue website for more information or a demonstration at:

http://new.hirevue.com/

How Do Clients Get this Feature?

This feature is controlled by a client setting and subscription setup in Workbench. Please contact your Kenexa Support Team for more information about enabling this feature.

Kenexa Tasks

Workbench

This project reuses the common service developed for "Background check" with a few modifications. For setup, you must:

- Enable client setting
- Set up forms, if necessary
- Set up candidate subscription details and mapping

For video interview integrations, the subscription can be set to pull from a mix of candidate profile and candidate form fields.

Client Setting

The client setting "Integration Background Check" has been renamed as:

"**Common Service Integration Type (Background Check, etc.)**"

Enable the setting (i.e., set to "Yes") in **Admin > Manage clients > Edit client settings**.

When that is done, the standard Background_Check_Integration (BGC Results) form is automatically created (if client is not already using one of these integrations), and schema will be available for selection for Candidate Export subscriptions).

> There is no change in creation of special req fields, Packages and Screenings, when switching on this client setting.

Add Vendor

Vendors are set up at ENVIRONMENT level – this detail is not particularly relevant for client setup, except that vendor must be set up once for Staging and once for Production.

Admin > Manage integration vendors > Add vendor:

Vendor name = Video Interview: HireVue

Vendor code = HireVue

Enter **Contact name** and **Email**, add any other desired fields, and select **Video Interview**.

Configure Form for Video Interview Vendor Results (optional)

The **"Background Check Results"** (DB name = Background_Check_Integration) form can be used for the HireVue results. If the client has two or more integration vendors, however, you can configure another form so the client can use a different results form for each integration vendor.

Tools->Forms->Candidate forms->Edit form attributes [for selected Multiple per candidate/req form]:

Set **Include Common Service vendor results = Yes** (default is No). Once set to Yes, the attribute cannot be changed back to No.

When set to **Yes**, the form becomes available on the Add subscription page, and the special standard fields are automatically created and added to the candidate form as in [RDP263](#), see details below. Form data will be imported to the corresponding standard fields. Fields of type LABEL (Candidate and User Information Section, Order Information Section, Package Information Section) are not needed for this custom form, so will not be created.

> Best practice: Configure as Hidden all fields that will not be used.

Common Service Integration (Background Check, etc.) Form Field List

Form Fields all are Field type= Text)	Database Field Name	Default value for Field Name	Default for Searchable & Outputable
Vendor Name	AccessCredential	Vendor Name	No
Candidate First Name	GivenName	Candidate First Name	No
Candidate Middle Name	MiddleName	Candidate Middle Name	No
Candidate Last Name	FamilyName	Candidate Last Name	No
Recruiter Name	Recruiter_Name	Recruiter Name	No

Order Number	ProviderReferenceId	Order Number	No
Order Status	**OrderStatus**	**Order Status**	**Yes**
Order Result	ResultStatus	Order Result	Yes
Order Score	Score	Order Score	Yes
Date Order Received	DateOrderReceived	Date Order Received	No
Package Name	Package_Name	Package Name	No
Package ID	PackageId	Package ID	No
Order Details	Order_Details	Order Details	No

Currently the system sends status **'Scheduled'** when the order has been submitted (i.e., interview has been scheduled), but vendor will also send '**Techcheck Complete**' and '**Interview Complete**' at a later date.

Common Service Integration (Background Check, etc.) Form Field Attributes

Field Attributes	Editable?	Notes
Placement	Yes	
Database Field Name	No	Will be disabled (value as per table below)
Field Name	Yes	Default value per table below.
Field Type	No	Option list disabled (value as per table below).
Custom Report Field	Yes	
Font Size	Yes	
Encrypted	No	Will be disabled and set to No.
Hide for these User types	Yes	
Hide in these Languages	Yes	
Required in these Languages	No	Will be disabled and blank (i.e., cannot be required for any language).
Field Length	Yes	
Searchable	Yes	Default value per table below.
Outputable	Yes	Default value per table below.

Once a form has been selected and saved as "Custom candidate form for vendor results" (next step, Add Subscription - Schema) for any for any candidate export subscription, it cannot be inactivated/deleted.

Add Subscription (Schema) - Subscription Tab

Tools > Integrations > Administration > Subscription admin [for Candidate export] > Add subscription:

Set **Select schema** = **HRXML 2.5 Common Service (Background Check, etc.)**

Select req template for which video interviews can be initiated when candidate moves into trigger HR status.

Set **HR status** trigger to initiate the request (cannot be Talent Record trigger). This HR status must be unique for all subscriptions, so use a unique HR status for this (create it if necessary, e.g., add "Video Interview" HR status). This form is read-only for Edit, to ensure no data is orphaned after the configuration is complete.

Set **Common Service Integration Type (Background Check, etc.) = 2-Step**

Select a form for **Custom candidate form for vendor results:**
You can use this field if the client has two or more integration vendors (so the client can use a different results form for each).

- The **"Background Check Results"** (DB name = Background_Check_Integration) form is used if no other configured candidate form is selected, and the form data is imported to the corresponding standard fields.

- If subscription has a custom candidate form associated, the form data is imported to the selected candidate form and the corresponding standard fields (see chart above) are populated with import values. Any non-standard fields on this form will not be used for this import.

- In both cases, the form is created for the candidate and is tied to the req. Fields not supported by HireVue will be blank (if not hidden by configuration).

This form is read-only for Edit – do not expect to use a custom Results form for any custom fields – it can only be used for the standard results fields. Don't try to "convert" an existing form for this purpose.

Add Subscription (Select Vendor) - Subscriber Tab

Tools > Integrations > Administration > Subscription admin [for Candidate export] > Add subscription:

Select the vendor and complete any other required fields.

Set up client-level authentication in the Authentication section: specify **Account, User name**, and **Password**. CSCs should get this information from the client or the vendor (in Staging/Production, this should be client-specific).

Add Subscription - Mapping Tab

Tools > Integrations > Administration > Subscription admin [for Candidate export] > Add subscription:

Set up export field mapping. No specific mapping is required, but it is recommended to map all available and HV-supported fields for best user experience. Refer to the HireVue mappings spreadsheet in the project folder for details:

http://intappshare/EngMainSite/EngProj11/RDP580%20%20Hirevuew%20Integration/BackgroundCheck_request_field_mapping_HireVue.xlsx

2x BrassRing Mapping Tool – Enhancements

The Mapping Tool is a separately purchased self-service tool for performing the following tasks for integration projects:

- Mapping field relationships between Kenexa 2x BrassRing and client systems (client user)
- Approving the mapped relationships (Kenexa)
- Signing off (client user)
- Configuring approved project (client user)
- Publishing to Staging and Production (Kenexa)

Release 13.0 includes several enhancements for the Mapping Tool, summarized below. Please see the *Kenexa 2x BrassRing Mapping Tool* Guide, posted on the Launch site, for additional information.

Product **LDP088** RDP611	þ 2x BrassRing	þ Integrations
Visible Changes	þ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	þ Configuration required – contact your Kenexa Support Team for implementation details.	

Feature Description

Enhancements to the 2x BrassRing Mapping Tool include the following:

- New "Out of the Box" (OOB) standardized integration meant for all new clients that do not have any projects created yet. The OOB project is a standard project that consists of predefined fields for Foundation, JCDD and User XML integrations, allowing use of standard configuration scripts, standard sample xml files, and a pre-defined data mapping document, for a shorter initial configuration process.   RDP611

- Existing XML for the 2xB candidate import now provides a flag to tell the system to replace the existing resume rather than add a new resume.
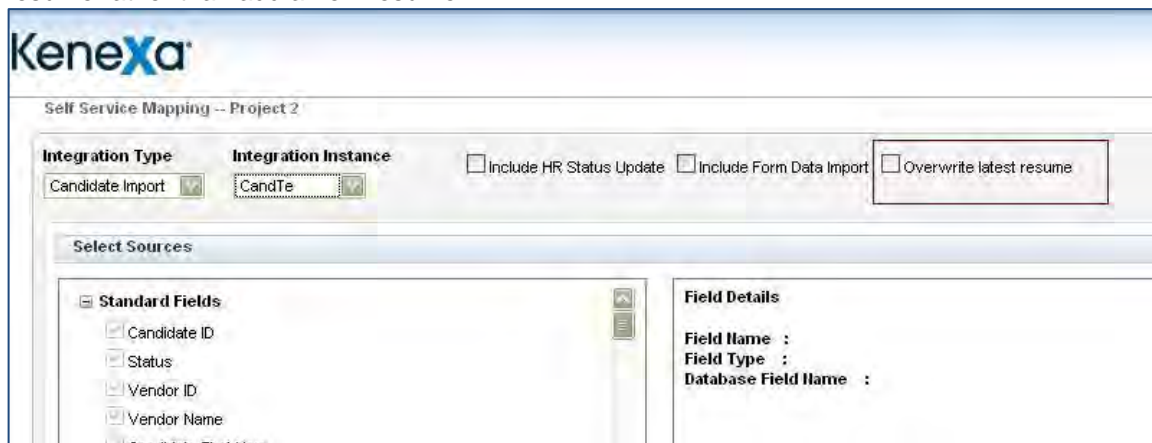
- Easier management of grouped job codes and users is provided by two new import nodes, JobCodeAccessGroups and ApprovalGroups. In addition, Approval Groups" and "Code Access Groups" fields were added to the list of optional fields to be included in the sample XML.

- A new export/import node, BRpartner:CandidateStackingField, supports candidate stacking fields functionality: encryption, hiding by user type or locale, and enforcement of data entry for US Social Security Number.
  A new optional attribute, UID at the location //UserArea/BRpartner: CandidateStackingField, supports the ability to use Candidate Stacking Field (CSF) value as the unique identifier for Candidate import with "Update" and "UpdateSkipProfile" actions. Values can be "yes" or "no."
- Support allowing users to pull additional data from the database related to the current question data in the XML output. This is relevant only for the candidate export integration type and for all export types except "HRXML Schema." A new "Add a custom query field" button inserts a new line at the bottom of the mapped fields. A new Query column displays the value "Y" if a query exists in the "SQL query" text box.
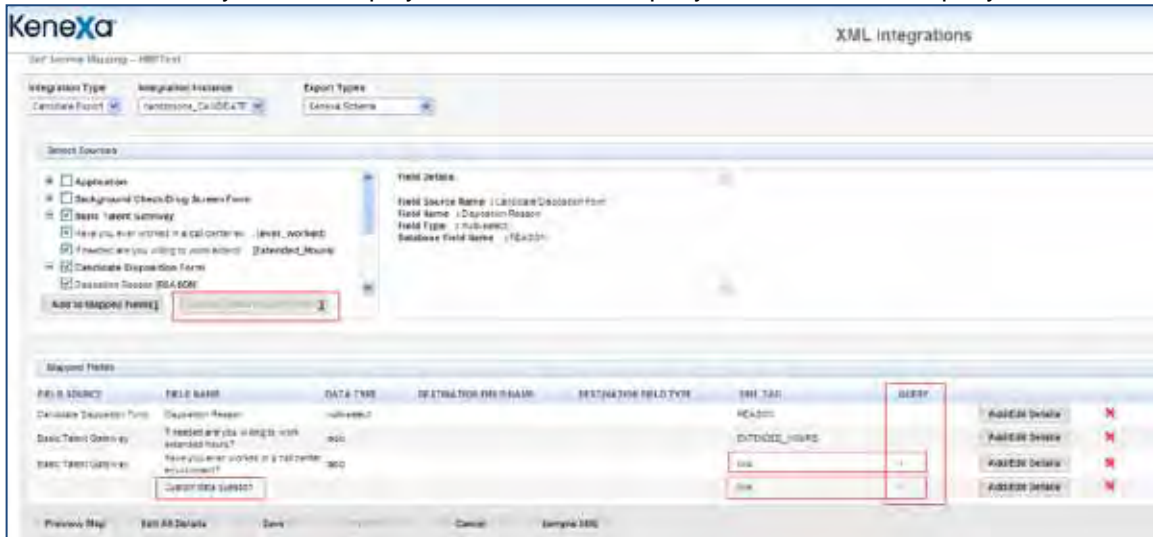
The "SQL query" text box has been added to the Field Details screen. Users enter a query for custom query fields, which changes the value in the XML tag to N/A to indicate that the XML tag for that field is derived from the SQL query entered in the "SQL Query" text box..
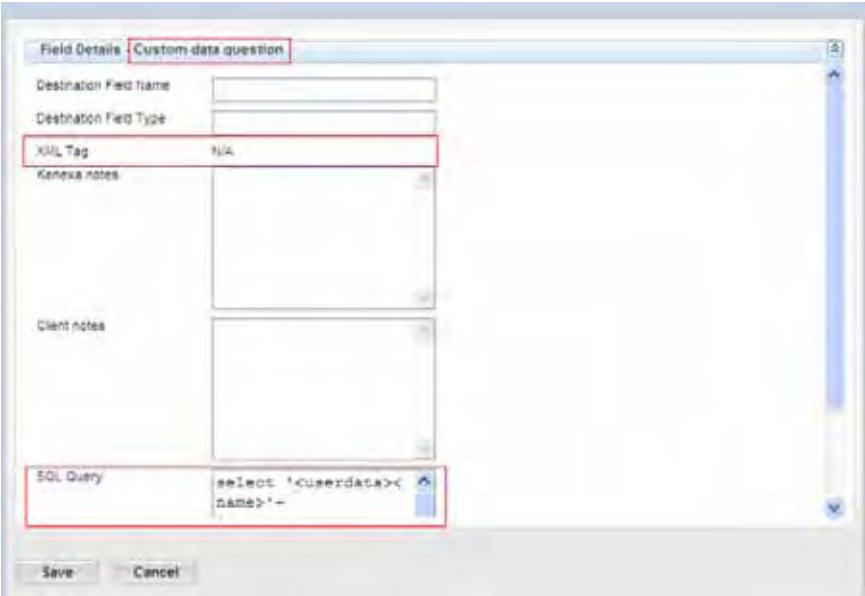
- Editing of integration type and instance is now performed solely using the Integration Type and Integration Instance drop-downs. Type and Integrationare no longer editable on the Mapped Fields screen (accessedby selecting "Edit All Details" from the Mapped fields region).
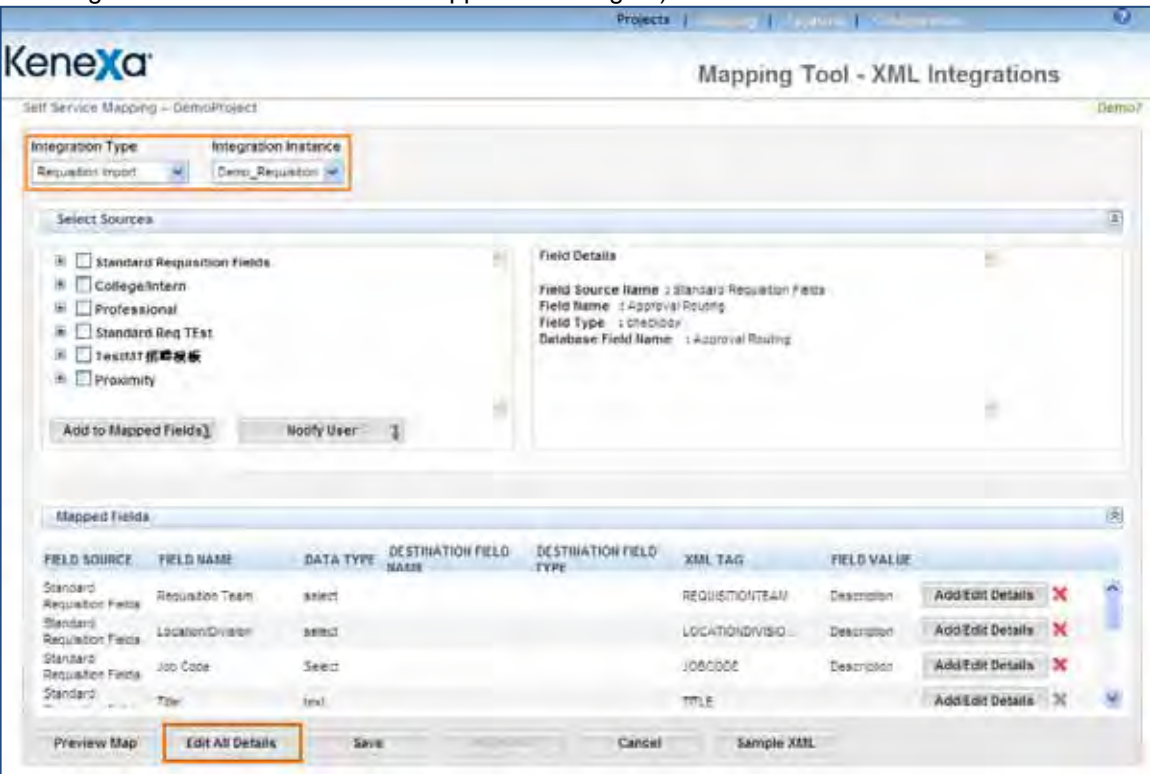
- A new check box, Include List filtering, makes list filtering data available along with foundation data in XML Foundation Import.
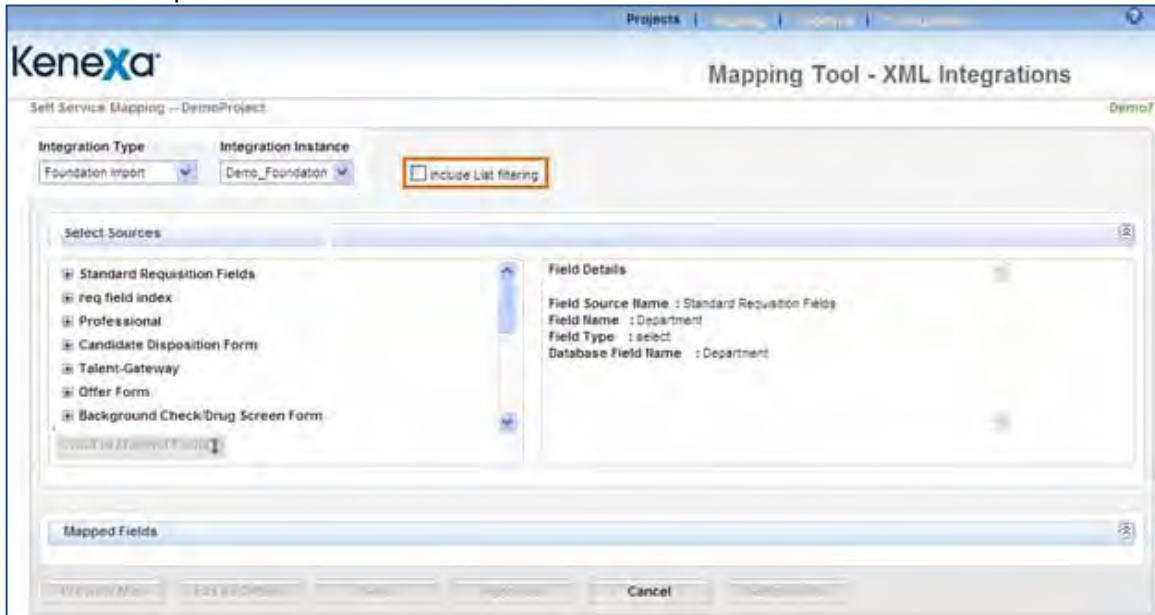
- A new group, "Proximity," added to the child fields for every parent field allows the proximity search fields to be used with RFA.

2x BrassRing Mapping Tool - Enhancements | 4
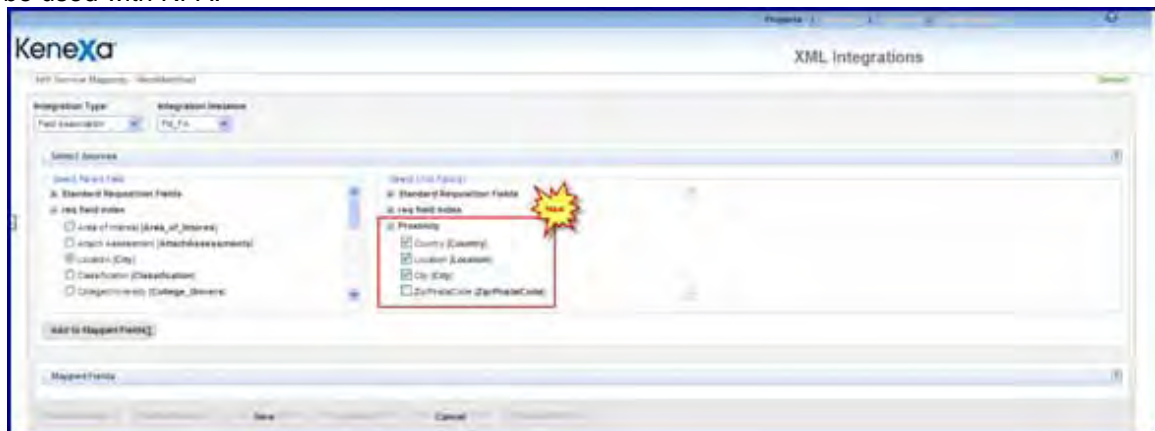
Proximity fields are also available for JCDD imports.
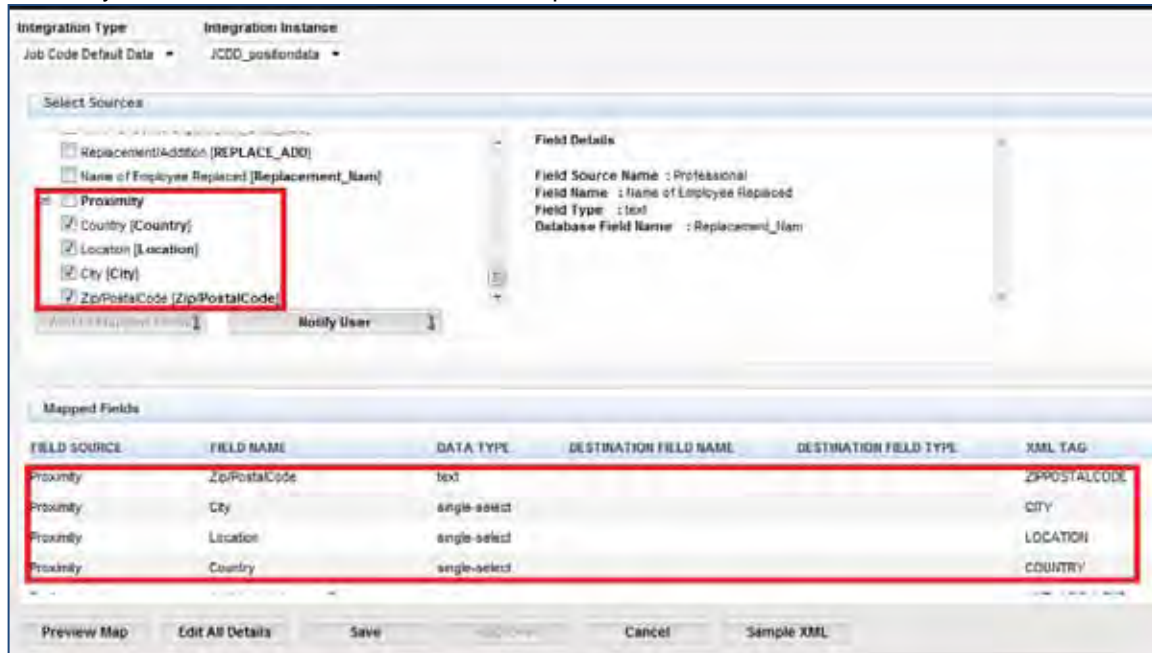
- Req/JCDD accept values for select fields as code or description, depending on configuration. A new "Field Value" field now appears in the Field Details, Edit all details of the mapped fields, and the Mapped fields screens in order so users can choose either code or description. This Field Value is available and active only for **Job Code Default Data Import** and **Requisition Import**.
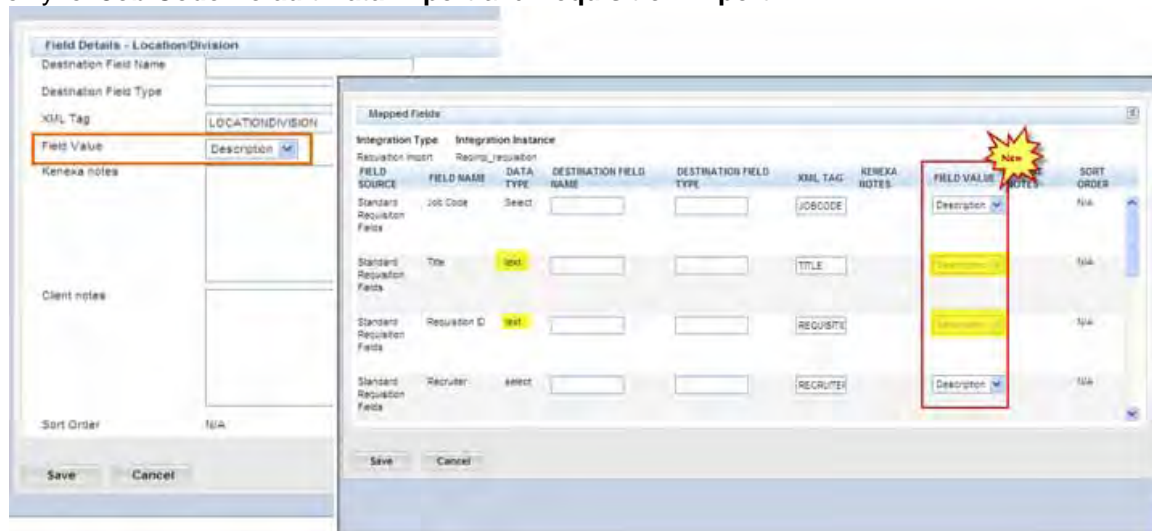
- The Standard Requisition Fields list now includes "Requistion Id" for the integration type "Requisition Import." The requisition id is always selected and uneditable.
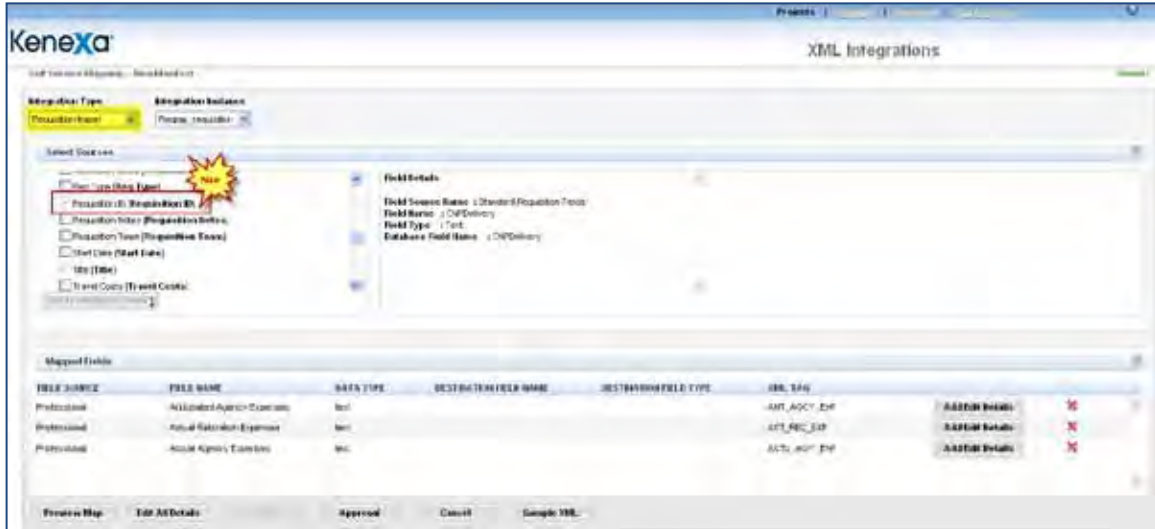
- For the integration type "Candidate Export," the fields are mapped at the subscription level. Client setting IntegrationExpReqWithCandidate has to be set to "Yes" Make sure that profile record exists in MSGProfileTables: Select * from MSGProfiles where profiletypeid=9 and <clientid=<clientid> When the "Export Requisiton Data with Candidate" is "Yes", then the property 'ReqExportProfileId' in MsgSubscriptionProperties should be set to master profile id value.
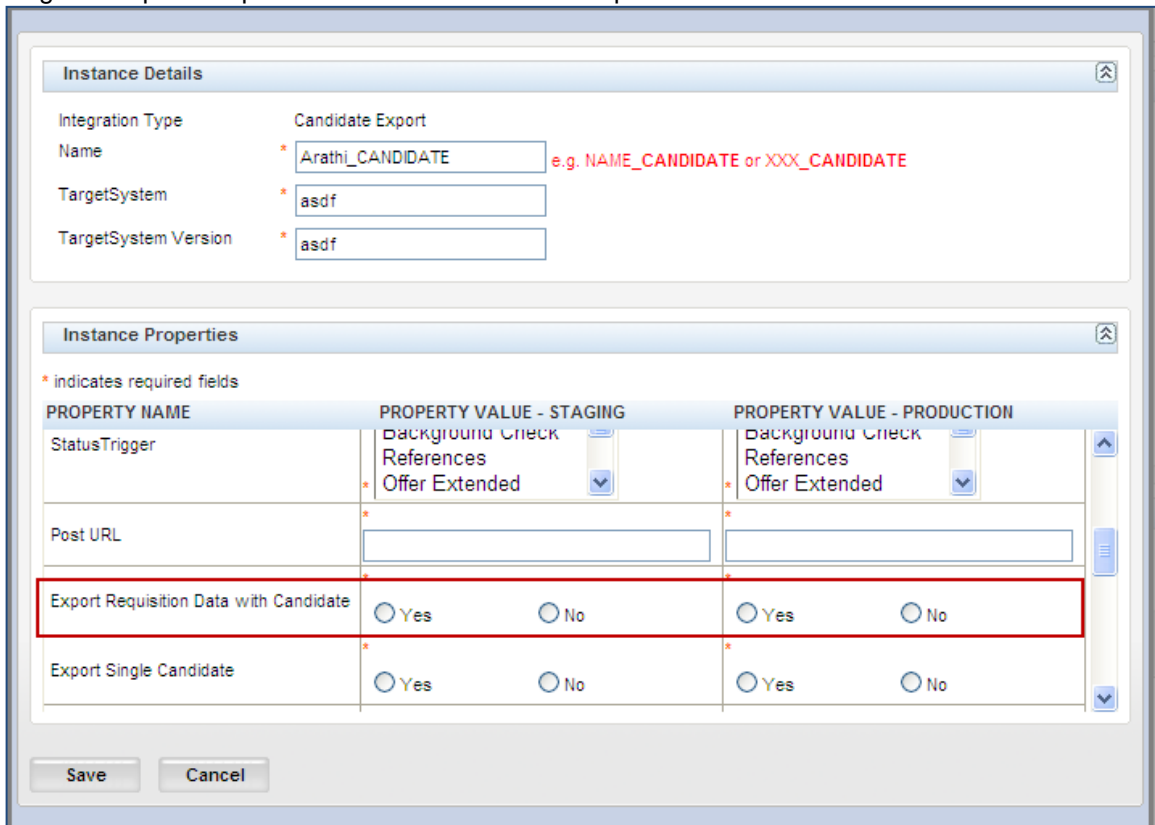
- Candidate Import integration type now includes "Import Directive" selection with options Insert, Update, Form Update, and Update Skip Profile. "Update Skip Profile" option allows the creation or update of forms and attachments (PDF files) without updating the candidate's profile or resume, filing candidate to a Req, or

adding codes.
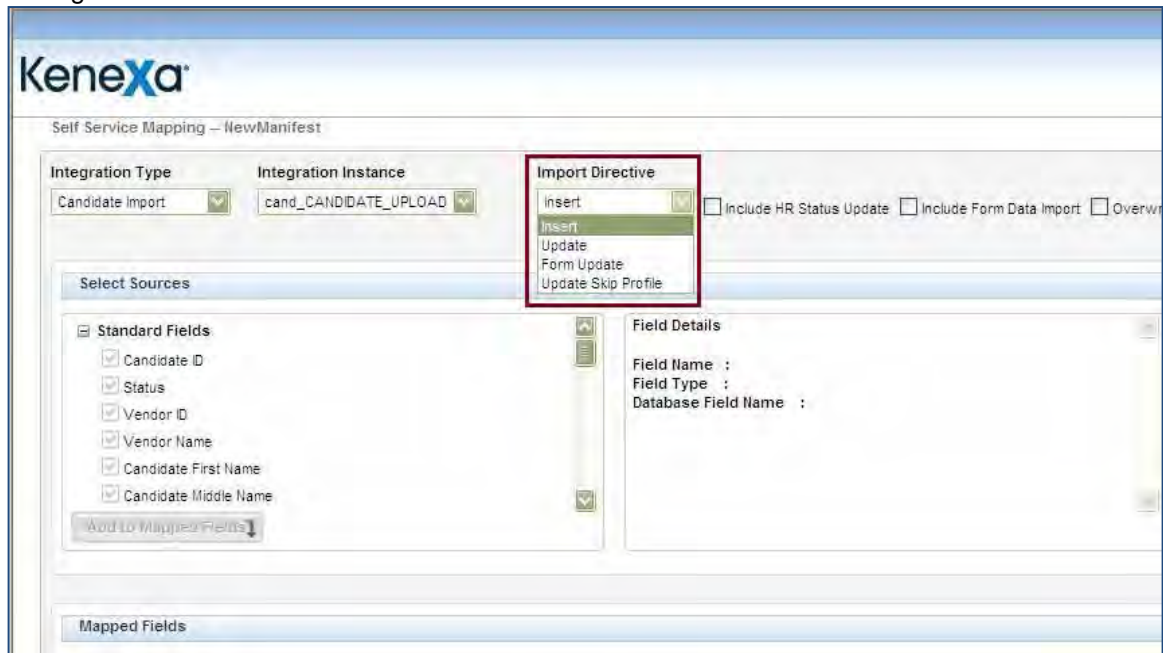
How Do Clients Get this Feature?

This tool is separately purchased. Please contact your Kenexa Support Team for more information. See the *Kenexa 2x BrassRing Mapping Tool Guide* posted to Other Documents on the 2xB Release Info tab, for information on using the Mapping Tool in Workbench.

Kenexa Tasks

Most current version of this RDP611 documen,t *Developer's Guide OOB (Out of the Box),* is located on this site:
http://intappshare/EngMainSite/EngProj11/RDP611%20%20out%20of%20the%20box%20mapping/OOB_DeveloperGuide.doc

DataMapping: Datamapping is predefined, download the OOB_XML_Data_Mapping_Template from the sharepoint and send to client for signoff. The initial roll out of the OOB Project does not call for any customization to the integrations. The only integrations types are the ones defined in the datamapping document. The only fields that will be included in the integration are those defined in the datamapping document.

Foundation: The foundation integration consists of 4 instances for the following fields:

- Location/Divison -- standard req field
- Department – standard req field
- Single_Select1 – custom req field
- Single_Select2 – custom req field

The sample xmls for each of these fields can be downloaded from the Sharepoint. In each of the sample xml files the values for the following tags will need to be modified to represent valid values for the current client.

```
<Sender
        <Id>HRXMLEMPLID</Id>
        <Credential>25342</Credential>
</Sender>
```

The backend scripts to update msgProfiles and msgProfileQuestions are on the sharepoint. There is one script per foundation instance. The scripts will need to be run in expressdb and then the appropriate scripts to configure the subscription needs to be run (_Subscription_MigrationMigrationFoundation.sql, _ActualMigrationAllIntegrationTypes_NEW.sql)

For the foundation scripts the following items need to be updated to reflect the correct values for the current client.

- set @clientid = 25342 –this should reflect the current client
- set @profilename = 'OOB_LOCATION_DIVISION' – replace OOB with current user's name

_ActualMigrationAllIntegrationTypes.sql will also need to be modified before running them.

```
INSERT INTO #ProfilesToMigrate (ProfileID,Name)
SELECT ProfileID, Name
FROM MsgProfiles (NOLOCK)
WHERE ClientID = @ClientID
AND NAME in ('HARLEYDAVIDSON_POSITIONDATA') -- INPUT Set appropriate profile
names to be migrated e.g
('FIRSTDATA_CANDIDATE','FIRSTDATA_BACKGROUNDCHECK','FIRSTDATA_NEWHIRE')
```

When all scripts have been run successfully use the XML Test Harnes to send sample xml's to the staging environment.

JCDD (PostionData): The felds for job code default data are predfined as well.

The sample xml will be the same for all out of the box clients with the exception of a few values that identify the current client. In the xml file change the following values to reflect the current client:

```
<Sender>
        <Id>HRXMLEMPLID</Id>
        <Credential>25342</Credential>
</Sender>
```

The following values will need to change in the script file to create the entries for msgprofiles, and msgprofilequetions to reflect the current client. For profilename OOB should be replaced with current client name.

- set @clientid = 25342
- set @profilename = OOB_POSITIONDATA'

The ActualMigrationAllIntegrationTypes.sql will need be run and the following values changed to reflect the current client.

```
INSERT INTO #ProfilesToMigrate (ProfileID,Name)
SELECT ProfileID, Name
FROM MsgProfiles (NOLOCK)
WHERE ClientID = @ClientID
AND NAME in ('HARLEYDAVIDSON_POSITIONDATA') -- INPUT Set appropriate profile
names to be migrated e.g
('FIRSTDATA_CANDIDATE','FIRSTDATA_BACKGROUNDCHECK','FIRSTDATA_NEWHIRE')
```

Once the scripts have been run and the changes to the xml have been completed test the integration by sending the postion data sample xml file to staging usine the XML Test Harness Tool.

Users: The initial implementation for User Import xml integration only the required fields are in scope. Code Access Groups and Approval groups are among some of the optional fields that are out of scope for the 4 week implementation. If the client would like t to utilize some of the optional fields then that should be handled as a separate project outside of the 4 week implementaion plan.

The xml sample xml files are up on sharepoint and the following values will need to be replaced to reflect the values for the current client.

<Sender>
        <Id>HRXMLEMPLID</Id>
        <Credential>25342</Credential>
</Sender>

The script to configure the profile requires changes to some values to reflect the current client. Set the current clientid and replace OOB with the clientname.

- set @clientid = 25342
- set @profilename = 'OOB_USER'

The ActualMigrationAllIntegrationTypes.sql will need be run and the following values changed to reflect the current client.

```
INSERT INTO #ProfilesToMigrate (ProfileID,Name)
SELECT ProfileID, Name
FROM MsgProfiles (NOLOCK)
WHERE ClientID = @ClientID
AND NAME in ('HARLEYDAVIDSON_POSITIONDATA') -- INPUT Set appropriate profile
names to be migrated e.g
('FIRSTDATA_CANDIDATE','FIRSTDATA_BACKGROUNDCHECK','FIRSTDATA_NEWHIRE')
```

Once the scripts have been run and the changes to the xml have been completed test the integration by sending the postion data sample xml file to staging usine the XML Test Harness Tool.

Kenexa 2x BrassRing Social Source – Enhancements

Kenexa 2x BrassRing Social Source™ is a sourcing and candidate relationship management solution that offers powerful integration with the 2x BrassRing® talent acquisition solution. Release 13.0 includes several enhancements for Social Source, summarized below.

Please see the the latest *2xB Social Source Release Notes*, *Maintenance Notes*, and *User Guide, and the 2x BrassRing Social Source Integration User Guide*, all available on the User Resource Center by selecting "Other Documents" from the "2xB Release Info" tab. Integration Steps is included in this PUGC for reference.

Product LDP093 Rel 13.0	þ 2x BrassRing þ Integrations – Social Source þ Workbench Self-Service
Visible Changes	þ Yes – details in *Visible Changes* document sent for each release build.
How do I get this feature?	þ Configuration required – contact your Kenexa Support Team for implementation details.

Feature Description

Enhancements to 2x BrassRing Social Source include the following:

- Provides additional system logic so that individuals' records are automatically linked when existing in both 2xB and Social Source systems. This automatic linkage helps users be aware of the Lead's status and better tailor communications to recipients.
- Automatically flags individuals found via TalentFilter if they also reside in 2xB. Users can chose not to reach out to these individuals, or to reach out in a different manner if they are already a 2xB candidate.
- One new user type privilege has been added, and two existing privileges have been split into four distinct privileges, providing greater control over end-user's actions.
- Automatic checks will run regularly to determine whether new Social Source leads already exist in 2xB. If so, the records are automatically linked. (When first released to production, all Social Source leads will be checked against 2xB.)

  Please be advised that there may be a delay before a new lead is automatically linked to a corresponding lead in Kenexa. The delay could be significant for clients with a very large number of leads. A significant delay would typically only occur after a new mass upload of leads.

  > **Note**: the automatic check will run one time for new leads, if the individual is not currently found in 2xB, no link will be made. If the individual subsequently applies directly to 2xB, Social Source will not automatically check the record again, since they have already been checked. A future release will close this gap by having an automated check occur from 2xB to SS; checking all new candidates against Social Source and automatically linking matching records.

- TalentFilter search results pages now displays an indicator alerting the user that a matching record exists in 2xB.
- Unlink functionality has been developed so that erroneously linked individuals can be disassociated from each other.

2xB User Experience

If you have the unlink privilege, you will now see an "Unlink Records" link for candidate's who are linked with a Social Source lead. The Unlink option is presented only within the 2xB UI.

New Leads added to Social Source are automatically linked with 2xB candidate records when First Name, Last Name, and email all match. The automated process runs through 200 leads every two minutes.
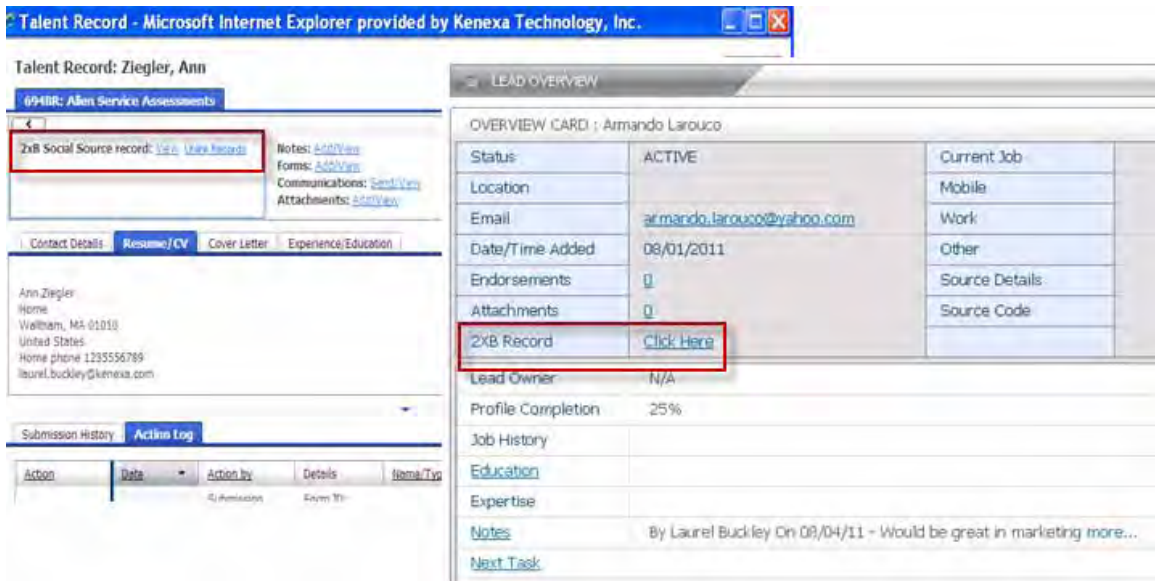
If you are not privileged to Add or View, you see "N/A" beside the Social Source label.
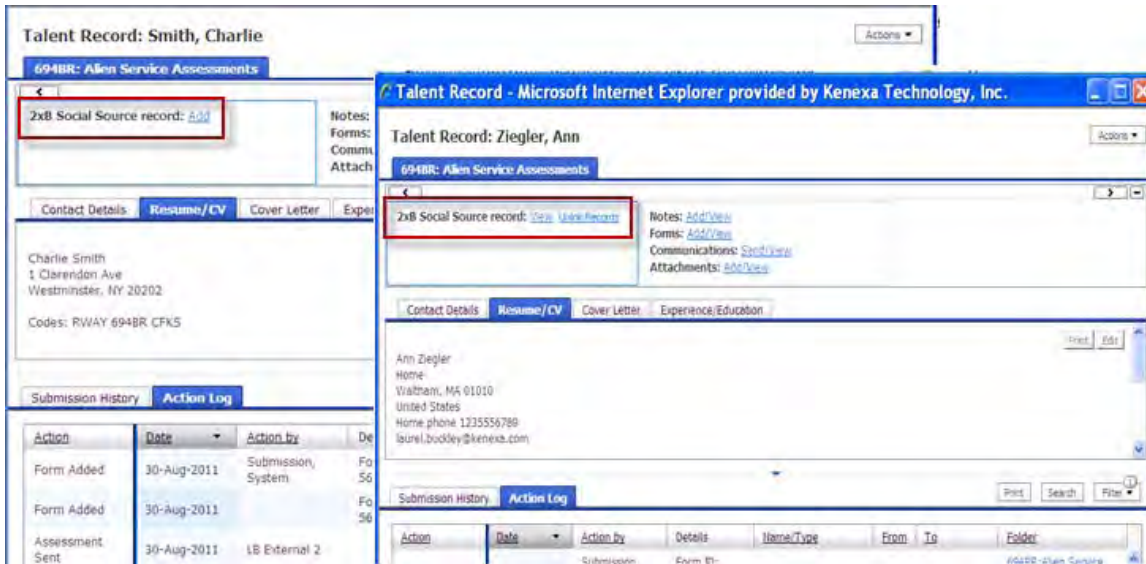
When viewing TalentFilter results, you will see a new column called "2xB Profile." It indicates individuals who have a matching email in 2xB, to alert you of a potential match.

How Do Clients Get this Feature?

For clients with Social Source already configured, these enhancements are available available automatically or controlled by the new/modified user type privileges. Please contact your Kenexa Support Team or Certified Workbench User for more information.

Workbench Self-Service Certified Users

User type privileges for CRM have been moved from Integration to Integration 2.

Tools > Users > User types > Edit type permissions [for selected user type] **> Integration 2**

User Type Integration Privilege Changes:

"CRM – copy candidate to CRM" has been separated and renamed as:

- "CRM – add/link Candidate to CRM"

- "CMR – view Candidate in CRM"

You can grant users either or both privileges; there is no dependency between privileges.

"CRM – manage campaigns/source from campaign" has been separated and renamed as:

- "CRM – manage campaign"
- "CRM – source from campaign"

This privilege is new:

- "CRM – unlink Candidate from CRM" d

User Types with the original privilege enabled will be updated to be granted both of the resulting new privileges
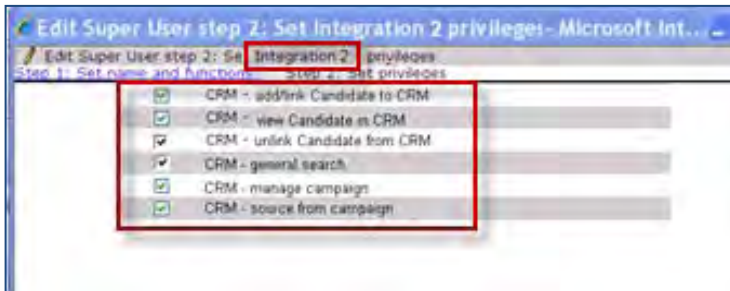
The CRM panel does not require any specific privileges, but must be mapped to the user type.

Kenexa 2x BrassRing®
Browser Support

Kenexa supports its solutions on a variety of operating systems[1] and web browsers[2]:

	Internet Explorer				Firefox			Safari		Chrome	
	6	7	8	9	3	4	5	4	5	12	13
2x Assess	~	~	~	~	~	~	~	~	~		
2x BrassRing	~	~	~	~	~	~	~	~	~	»	»
2x BrassRing Workbench	~	~	~	~							
2x Onboard	~	~	~		~	~	~	~	~		
2x Perform	~	~	~		~	~	~	~	~		
2x Recruit	~	~	~		~	~	~	~	~	»	»
Interview Builder		~	~								

Key: ~ : Full feature support.   » : Candidate experience

[1]Indicated browsers are supported on Windows XP/Vista/7 and Macintosh OSX 10.4.4/10.5 in alignment with the browser manufacturers' supported operating systems. Operating system and browser patches must be current. Event Manage browser requirements are the same as for 2x BrassRing.

[2]Web browsers should be configured to accept cookies, with browser security settings set to medium or lower.

For 2x BrassRing Talent Gateways and Agency Manager, the following platforms are supported[3]:

	Internet Explorer 6.0+	Firefox 3.0+	Safari 4.0+	Chrome 12+
Talent Gateway	»	»	»[4]	»
Agency Manager	»	»	»[4]	»

[3]We recognize that candidates can apply from many browsers, operating systems, and devices. Therefore, Kenexa will support the most heavily-adopted browsers –Safari, Internet Explorer, Mozilla Firefox, and Google Chrome– on Talent Gateways close to the time of their release.

For the more extensive core 2xBrassRing user interface, new versions of already-supported browsers will generally be supported within 3 months of release. Browsers and browser versions are often controlled by corporate IT departments, so support of new browsers is primarily based on corporate adoption statistics. When demand is sufficient, Kenexa will move to support new browsers. Those listed here are officially supported, as of June 8, 2011. They have been tested for use with our applications, but other combinations may work with our products.

[4]Limitation with Safari browsers for clients using iframes to host Talent Gateways: by default, Safari prevents a web page from setting cookies if it is hosted in a frame with a domain different from the parent's (e.g., when frameset is from HR_Client.com and TG's frame is sjobs.BrassRing.com). One workaround to avoid the cookie restriction is to update your custom text on the TG landing page and request Safari/Mac users to click a link that will launch the TG in a separate window.

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

Language	Country	2xB	Spell Check	Agency Manager	Talent Gateway	TG/AM Extraction	TDC Extraction	Smart Approval	Mobile Recruiter	Event Manager	2x Onboard Users and Candidates
Azerbaijani	Azerbaijan				X						
Chinese (Simplified)	China	X		X	X	X					X
Chinese (Traditional)	Taiwan				X	X					X
Croatian	Croatia				X						
Czech	Czech Republic				X						X
Danish	Denmark				X						X
Dutch	Netherlands	X	X	X	X	X	X				X
Dutch (Informal)	Netherlands				X						
Dutch	Belgium					X					
English	United States	X	X	X	X	X	X	X	X	X	X
English	UK	X	X	X	X	X					X
English - US Govt	United States	X	X	X	X						
English	Ireland					X					
Finnish	Finland				X						
French	France	X	X	X	X	X	X			X	X
French	Canada	X	X	X	X	X				X	X
French	Belgium					X					
German	Germany	X	X	X	X	X	X			X	X
German (Informal)	Germany				X						
German	Austria					X					
German	Switzerland					X					
Greece	Greek				X						
Hungarian	Hungary				X						
Hungarian (Informal)	Hungary				X						
Italian	Italy	X	X	X	X	X	X			X	X
Japanese	Japan	X		X	X						X
Korean	Korea, South				X						X
Norwegian	Norway				X						
Polish	Poland				X						X
Portuguese	Brazil	X	X	X	X						X
Portuguese	Portugal		X		X						X
Russian	Russian Federation	X			X						X
Serbian	Serbia	X		X	X						
Slovak	Slovakia				X						
Slovenian	Slovenia				X						
Spanish	Spain	X	X	X	X	X	X				X
Spanish (Informal)	Spain				X						
Spanish	Mexico										X
Swedish	Sweden	X	X	X	X	X					
Turkish	Turkey				X						
Welsh	Wales				X						
Total Locales		14	11	13	35	16	6	1	1	5	19
Total Languages		12		11	27	13	6	1	1	4	

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2xBrassRing -> Social Source Configuration Steps

*******DRAFT*******

Setup for 2xB -> Social Sourcing

1) Request new client creation.

- Send email to Missy Greene (Missy.Greene@FADV.com) requesting a new client set up. Provide:
    - o 2xB Client ID
    - o Client Name
    - o Environment: Staging or Production
    - o Enable OFCCP: Yes or No

2) FADV will create a new client

- FADV will reply back via email once the site has been created and provide:
    - o FADV Account Name (Short Client Name)
    - o Service User Name
    - o Service User Password
    - o Service URL
- Login into 2xSocialSource and create User Roles that relate to user types within the 2xB system. For example, in 2xSocialSource Role = Admin User and this would be mapped to the 2xB User Type = System Admin. These will be required in the next step.

3) Turn on 2xB client setting.

- Create a manifest for the Social Sourcing candidate import (the manifest name will need to be provided back to FADV).

    To create manifest: WB>Tools>Integration>Administration
    1) *If there is no Integration Type = "Candidate Import" then Add Integration Type, select Candidate Import*
    2) *Once available, then under subscription admin: add subscription.*
    (a) *Subscription name and Manifest name should match. You can have up to 2 underscores, ex: "FADV_CANDIDATE_UPLOAD"*
    (b) *Select desired stacking logic*
    (c) *May set attachment category if desired*
    (d) **Check the "CRM Import" checkbox**.
    (e) *Verify that there is Subscriber selected on the Subscriber tab. (if not select "Vendor: DefaultVendor")*

- Create new Import Code and Source Code to be used by FADV

    To create codes: WB>Tools>Settings>Code Types
    1) *Create new code type = Import (assuming you don't already have this code type)*
    2) *Create new Import code to identify that a candidate came from 2xSocialSource, e.g "2XSOCIALSOURCE" or "FADV". This will show as a code attached to the candidate.*
    3) *Create new Source code, similar to Import code, this should be something that helps identify where the candidate came from. It must differ from Import code.*

4) Create a HIVE Project Ticket and then create a Work Ticket off of the Project Ticket

- Project Ticket Details

- Type = Integration
- Sub Type = General Services
- Assign to = yourself
- Product = 2xBrassRing
- Category = Integration
- Sub Category = Social Source
- Configuration = Third Party Integration
- Project Ticket Details
  - Type = Maintenance – Standard
  - Assign To = Engineering Queue and then reassign to Galina Slastenko.
  - Product = 2xBrassRing
  - Severity = Maintenance – Standard
  - Category = Configuration
  - Sub Category = Third Party Setup
  - Environment= Staging or Production
  - Notes =
    - FADV Details
      - FADV Account Name (Short Client Name)
      - Service User Name
      - Service User Password
      - Service URL
    - 2xB Details
      - Import Code: [Insert Value Here]
      - Source code: [Insert Value Here]
      - Manifest Name: [Insert Value Here]
      - User Type Mapping (2xB User Type = 2xSocialSource Role):
        - System Admin = Admin User
        - Recruiter = Basic User
        - Etc.
      NOTE: You only need to include 2xB User Types which will be given access to Social Sourcing/FADV.
    - Once this has been configured, Galina will send the credentials to FADV to complete the integration process. Once FADV completes the process, then the HIVE ticket will be assigned back to you.

5) Complete 2xB configuration steps, this can be completed while you are waiting on step 4 above to be completed.

Enable client setting:

IntegrationAssessment   ○ None ○ PreVisor ○ Kenexa Prove It! ● Searchable KAS

IntegrationAssessment Considered for/Result   ● Display hyperlink ○ Display text only

Integration Candidate Relationship Management (CRM)   ○ None ● First Advantage (Contact SE to populate client details)

IntegrationContact   `No`

IntegrationDefGroupID   `0`

IntegrationDefRecruiter   `0`

Turn on User Type privileges (under Intergrations):

Edit Super User step 2: Set Integration privileges
Step 1: Set name and functions   Step 2: Set privileges

"Integration" privileges

Select All	**Set privileges**
Clear All	

- ☑ 2xB sourcing - enabled
- ☑ Assessment - batch configuration - Edit
- ☑ Assessment - batch configuration - View
- ☑ Assessment - run
- ☑ Assessment - run optional assessments
- ☑ Assessment - run retake
- ☑ Assessment - view history
- ☑ CRM - copy candidate to CRM
- ☑ CRM - general search
- ☑ CRM - manage campaigns/source from campaign
- ☑
- ☐ Civil Service Register - enabled
- ☑ Community Gateway Posting
- ☐ Event Manager - enabled
- ☑ External sourcing - enabled
- ☑ Import reqs
- ☑ Interview Builder - Add to Interview/Template
- ☑ Interview Builder - Copy Interview
- ☑ Interview Builder - Create Interview
- ☑ Interview Builder - Create Interview from Template
- ☑ Interview Builder - Create Interview from Template within Req
- ☑ Interview Builder - Create Interview Template
- ☑ Interview Builder - Edit Interview
- ☑ Interview Builder - Print/Send Interview
- ☑ Interview Builder - Score Interview
- ☑ Posting interface - post and administer my and others defaults
- ☑ Posting interface - post and define my defaults
- ☑ PreciseSource - enabled
- ☑ Recruitment Services Posting

Done   Revert to Saved   Cancel

Map New UI Panel:

Update New UI Ribbon Configuration: WB>Tools>Users>User Types>Screen Display Defaults

5

Details on Apply URL

Apply URL use in Social Source

Kenexa Interview Builder – View Interview Enhancement

For clients using Kenexa Interview Builder (KIB), users can now preview the interview guide associated with the job code when adding or editing reqs, as well as when viewing req details or eLinking a req.

Product RDP573 Rel 13.0	☑ 2x BrassRing	☑ Kenexa Interview Builder
Visible Changes	☑ Yes – details in *Visible Changes* document sent for each release build.	
How do I get this feature?	☑ Automatic (with Interview Builder configured) – see details below.	

Feature Description

For clients using Kenexa Interview Builder (KIB), all 2xB users with the "Interview Builder – Print/Send Interview" Integration user type privilege enabled can now view or preview the interview guides when:

- adding or editing a requisition
- viewing req details
- eLinking a req

Previously, users required Admin access in order to use the Admin menu to manage job codes. They could then preview an interview by editing the interviews attached to a job code.

View Interview from Add/Edit Reqs

Users with the appropriate privilege preview interviews associated to the job code from the Add req or Edit req page by selecting interviews from the list (if necessary) and clicking the new hyperlink "View Interviews."
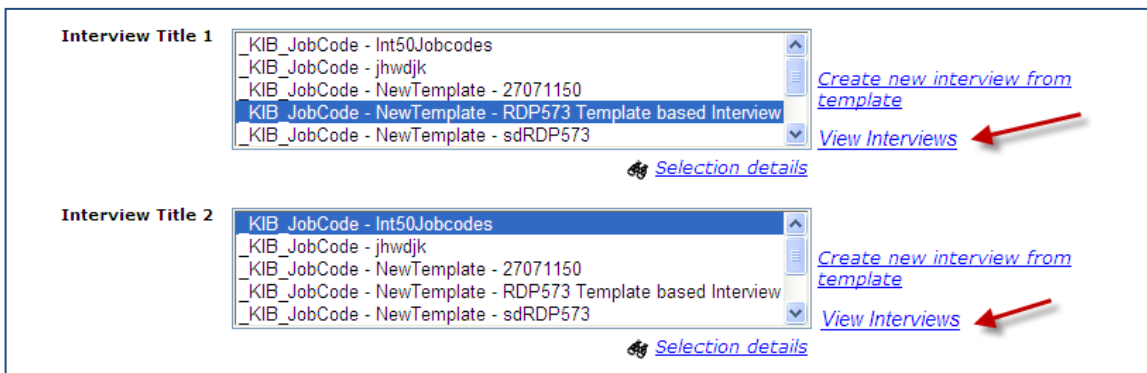
This links to the "Open interview" window in KIB, or to the "Interview form" window in KIB if the clicked hyperlink is for an interview title that contains only one interview and one form associated to the job code.

Link to Interview from Req Details/eLinks

Similarly, when users view Req details or eLink a req to to someone to view, edit, or approve it, each Interview title name is a hyperlink to the "Open interview" window on KIB.
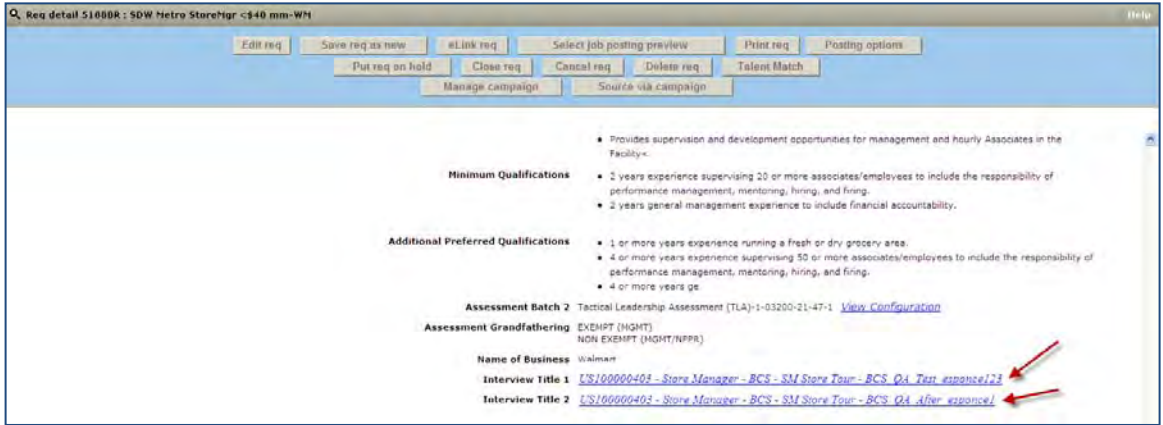
Viewing in KIB

In all cases, the Open Interview screen in KIB has interview information appropriately pre-populated from 2xB. There are no changes to current functionality within KIB. The user can select (as necessary) and open the desired form.

Open Interview Screen in KIB

Interview Form Screen in KIB

How Do Clients Get this Feature?

This feature is available automatically without configuration for clients with the Kenexa Interview Builder integration.

New UI – Custom Report Subpanel Enhancement

Custom Report Subpanels (such as an EEOC Summary report) provide a summary report of candidate form field statistics within a particular folder. Your organization can now group candidate form field values into broader categories, and display the candidate counts for each of these categories (e.g., for EEOC Summary report, you can group individual ethnicities).

Product	☑ 2x BrassRing	☑ New UI
RDP558 Rel 13.0	☑ Workbench Self-Service	
Visible Changes	☑ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	☑ Specific conditions required – see details below.	

Feature Description
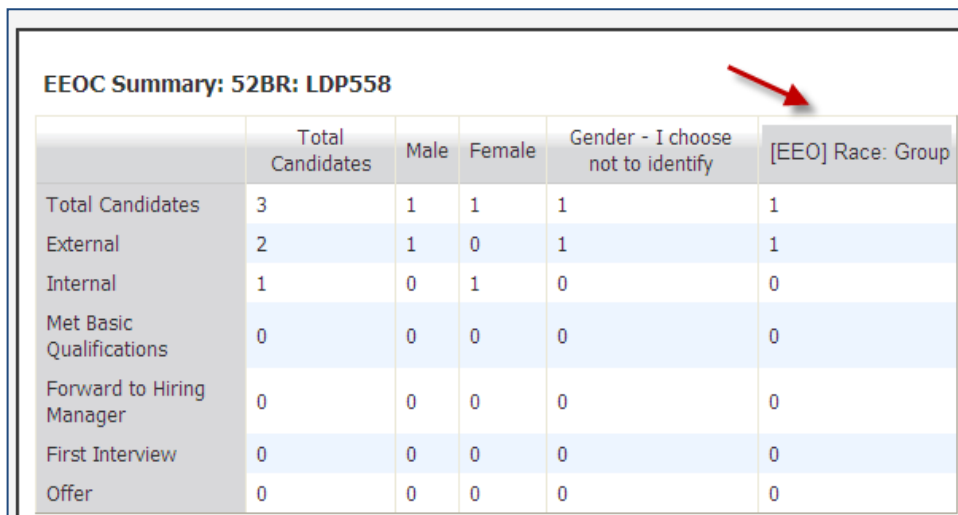
A custom subpanel is used to give a tally of candidates with a particular field value, and is accessed from Welcome screen New UI panels. This enhancement gives the ability to group field values into categories on the report-type custom subpanels, and display the candidate counts for each of these categories. Thus the EEOC Summary report, a custom report subpanel that provides a summary of diversity statistics, can now show categories that can include multiple EEO field values.

For example, your organization can group Chinese and Japanese ethnicity values into an "Asian" category/tally, or group various ethnicity values into Diverse and Non-diverse categorie.

The grouping is done by selecting multiple candidate form field options (rather than just one) for a column row of the field grid when configuring the report subpanel. You also apply the desired label that identifies the group column there.

2xB User Experience

Users who can access the EEOC Summary panel do so by clicking the subpanel on an open req panel. icon.

EEOC Summary: 52BR: LDP558	Total Candidates	Male	Female	Gender - I choose not to identify	[EEO] Race: Group
Total Candidates	3	1	1	1	1
External	2	1	0	1	1
Internal	1	0	1	0	0
Met Basic Qualifications	0	0	0	0	0
Forward to Hiring Manager	0	0	0	0	0
First Interview	0	0	0	0	0
Offer	0	0	0	0	0

The data that displays in the group column is the total count of the individual option responses configured for the group. For example, if a group labeled Diverse has been configured with options Hispanic, Black Not of Hispanic Origen, and Asian or Pacific, then the EEOC Panel will display the count of option responses for those three options: Hispanic, Black Not of Hispanic Origen, and Asian or Pacific.

How Do Clients Get this Feature?

This feature is available automatically for configuration by Certified Workbench Self-Service users or your Kenexa Support Team. You can contact your Kenexa Support Team for more information about enabling it.

Workbench Self-Service Certified Users

The Report subpanel type of the Custom Subpanel configuration now supports selection of multiple candidate form field options (with some restrictions) in the "Candidate Form Field Configuration" section of the Add/Edit panel configuration page.

Tools> Settings > Panel Configuration > Administer configuration > Add/Edit configuration > **Subpanel type** = **Report**

If more than one field is selected in the Selected field column, it displays as the following in the grid:

[form name] fieldname - Selected(number of fields selected)

For example: **[EEO] Race – Selected(4)**

For "Label" when more than one field is selected, the default is:

[form name] field name: Group

For example: **[EEO] Race: Group**

To configure the report:

1. Enter Configuration name, Panel title, and click **Report** for Subpanel type.
2. Select axis for HR Status or Candidate type: **Vertical** or **Horizontal**. The same value cannot be selected for both. The Candidate form fields will be adjusted accordingly.
3. Select HR Statuses and Candidates types. At least one row must be configured. Labels can't be edited for the report, but can be translated for your organization's purchased languages.
4. Expand the Candidate Form Field Configuration section and configure at least one row by clicking **Select field** to select Candidate form fields, such as the ethnicity and gender fields from EEO or fair employment

forms. The Search for Options screen displays.
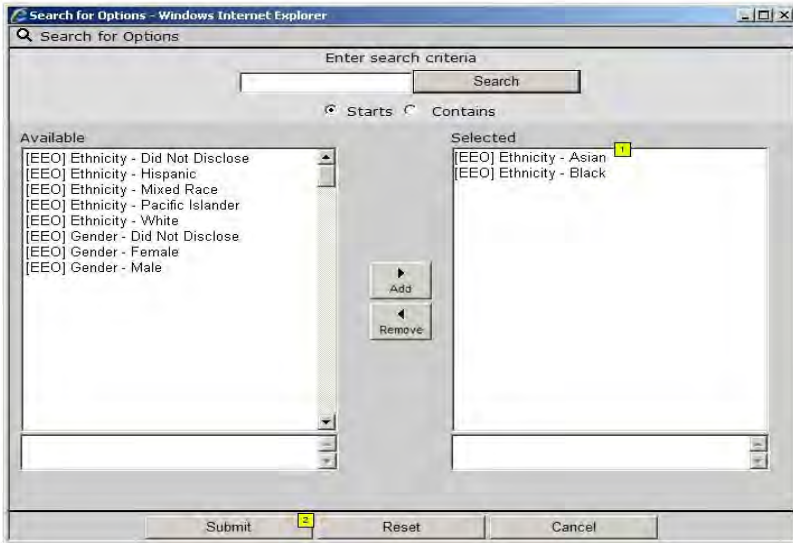
.
Make *up to five* selections (from the same form field) for the row. Click **Submit** when finished.

> When grouping multiple options in a category, you can select:
> * up to five options for the same form field
> * for up to three rows of multiple selections in your grid.

Candidate form fields that can be configured include: Single-Select, Multi-Select, Checkbox, Radio Button. This includes those of the above type that may also have the following field attributes: Auto-fill, and pull from lists where pull options are from lists of options from other form fields (but not from lists of: Active Managers, Active Recruiters, Active Enterprise Users, All active users, Specific codes, All open reqs, All pending reqs, All reqs, State, Country).

5. On the panel configuration page, click View/Edit translations to edit the field labels, or to translate for your organization's purchased languages.
6. Repeat the process to addadditional desired fields. You can have no more that three fields with multiple options selected.
7. Click **Save** to save the custom subpanel configuration.

The data that will display in the group column will be the total count of the individual option responses. For example: If group has options A, B and C, it will be the count of option responses for A, B and C.

> The report panel is context-specific and pertains to a particular folder, so the column count will be the sum of that option response from the form field for all candidates within that folder (as per current functionality for single fields).

New UI – Default Candidate Results Panel Sort

Default Candidate Sort configures up to three default sort fields used in the Candidate Results panel in the new User Interface (UI). Defining default sort fields for candidates in Req folders enables administrators to comply with the Office of Federal Contract Compliance Program (OFCCP) guidelines. User type privileges determine if default sort options are editable.

Default Candidate Sort requires the configuration of a new panel attribute setting. This feature also includes new, optional user type privileges that allow your organization to restrict access to the 2xB classic UI where the default candidate sort settings are not enforced.

Product LDP072	☑ 2x BrassRing ☑ New UI ☑ Workbench Self-Service
Visible Changes	☑ No – requires specific conditions / configuration for visibility.
How do I get this feature?	☑ Configuration required – contact your Kenexa Support Team for implementation details.

Feature Description

This feature configures three default sort fields used for candidates displayed in the Candidate Results panel. 2xB users can now define default sort fields and ensure your organization's interpretation of OFCCP compliance when reviewing candidates in Req folders. Clients can configure user type privileges to set the default sort options as editable.

Configuration of the new use type privilege ensures the use of the default configure sort by limiting some navigation pathways to the 2xB classic UI.

> Note: The configuration of the new user type privilege is optional and is only used to restrict users from viewing candidates without the default sort.

2xB User Experience

Default sort options are configured and associated with user types. When default sort fields are configured, additional panel configuration determines whether 2xB users can edit the default sort. When default sort option restrictions are configured for their user type, 2xB user viewing candidates from within Candidate Results can only access the default sort options.

Default Sort Options

In the Candidate Results panel, the 2xB user clicks Display > Sort Options to view sorting options.

The Edit Sort Options dialog box displays:
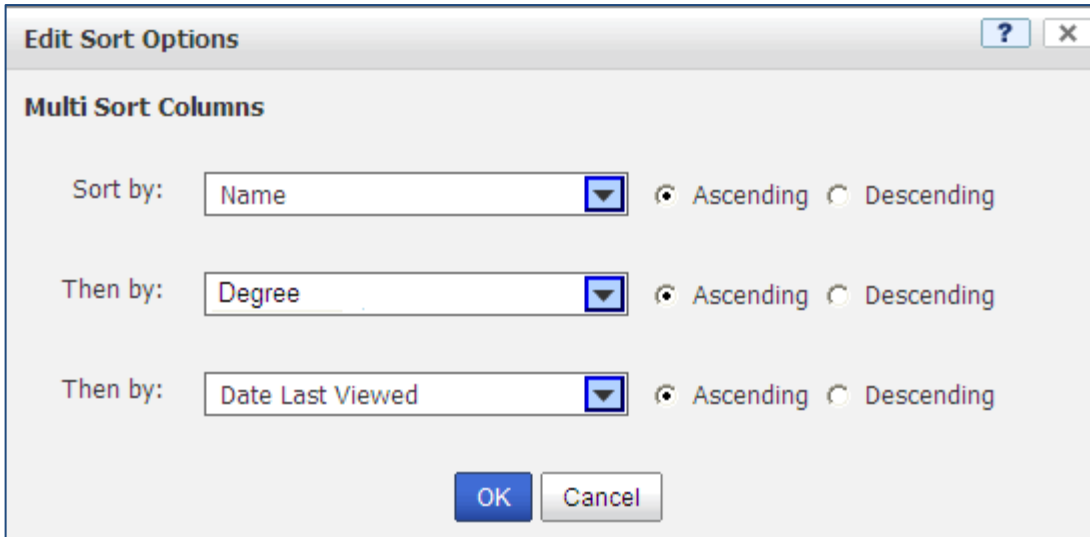
The Edit Sort Options dialog displays the sort option available to the logged-in user type. In this example, the user type can view the default sort options and edit them for the current session, but cannot save a new default sort.

If the logged-in user type is configured with the privilege to change the default sort options, two additional buttons display on the Edit Sort Options dialog box, a **Restore Defaults** and **Save as Default** button.

New User Type Privileges (Optional)

The configuration of the new user type privileges is optional. The new user type privileges restrict access to 2xB Classic Req listing pages and ensures 2xB users can only access candidates in Req folders in the New UI Candidate Results panel when the default sort is enforced.

When the new user type privileges are configured, the "Open" and /or "Pending" options do not appear in the menus as shown.

Additionally, if the user type privilege has been configured to hide My Open Reqs menu, the My Open Reqs option from the My folders menu does not appear as shown.
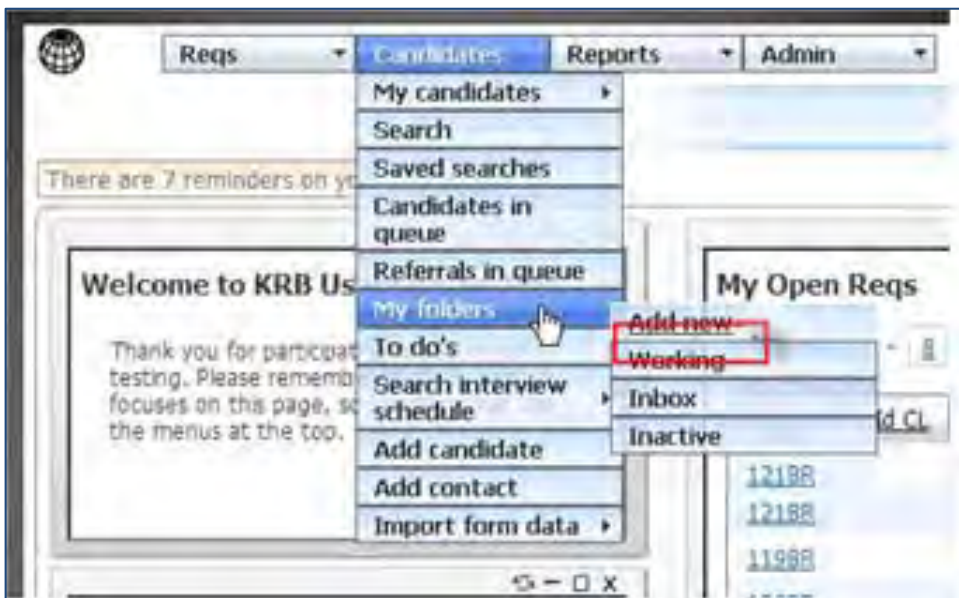
How Do Clients Get this Feature?

This feature requires Workbench configuration. Please contact your Kenexa Support Team or Certified Workbench User for more information.

Workbench Self-Service Certified Users

Configuring Default Sort Options

1. Select **Tools > Settings > Panel Configuration**. The Panel Configuration screen displays:

2. Click **Administer Configuration** icon from the Candidate Results selection. The Administer panel configuration displays.

3. Click **Edit Configuration**. The Edit Panel Configuration dialog box displays.

4. Click **Edit** in the Panel Attributes field**.** The Panel Attributes dialog box displays.

5. Select **Allow user to save default sort** checkbox if you want 2xB users to be able to save their own default sort (edit default sort). If you want to restrict 2XB users you can leave this checkbox unchecked.
6. Select **List** to choose a default sort field option. The Search for Field dialog box displays.

7. Select a Search field in the Available list box and click **Add.** You can only select one search element at a time.

> **Note:** Select only sort fields existing in the panel configuration. If you choose a field that is not configured, an error message displays when the panel configuration is saved.

8. Click **Submit**.
9. Select **Ascending** or **Descending** to define the sort type for this selection.
10. Repeat Step 6 through Step 9 to add the optional additional default sort fields. Proceed to the next step if you are not adding additional default sort fields.
11. Click **Done.** The Panel Attributes displays informing you that changes are not saved until you Save the entire panel configuration.
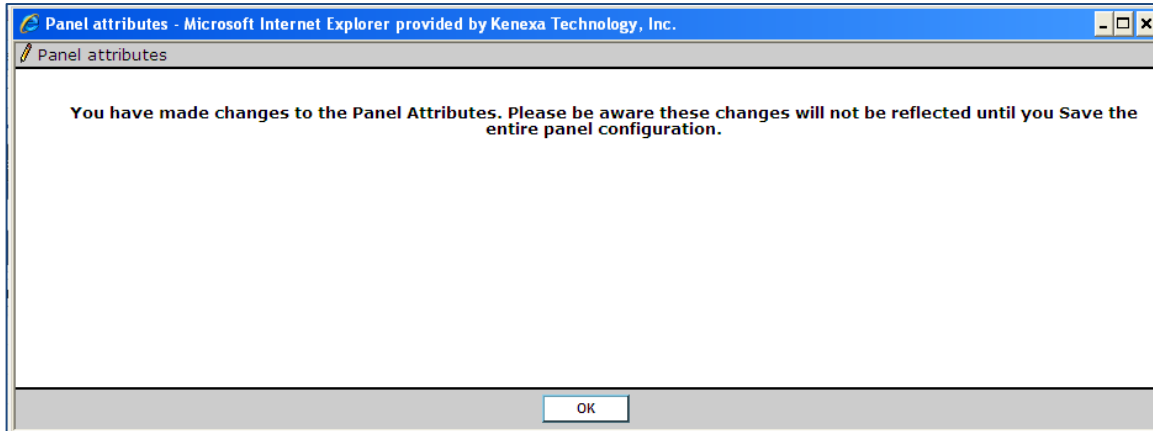
12. Click **OK**. The Add panel configuration redisplays.
13. Click **Save** to save the panel configuration.
   The panel configuration for default sort options is saved.

Configuring New User Type Privilege-(Optional)

New user type privilege configuration is optional. Configuring the new user type privilege restricts access to 2xB Classic Req listing pages and ensures 2xB users can only access candidates in Req folders in the New UI Candidate Results Panel.

> **Note:** The configuration of the new user type privilege is optional and is only used to restrict users from viewing candidates without the default sort.

To configure new user type privileges:

1. In WB: **Tools > Users > User Types**.
2. Select a user type and click the **Edit Type Permissions** icon**.** The Set Name and Functions dialog box displays.
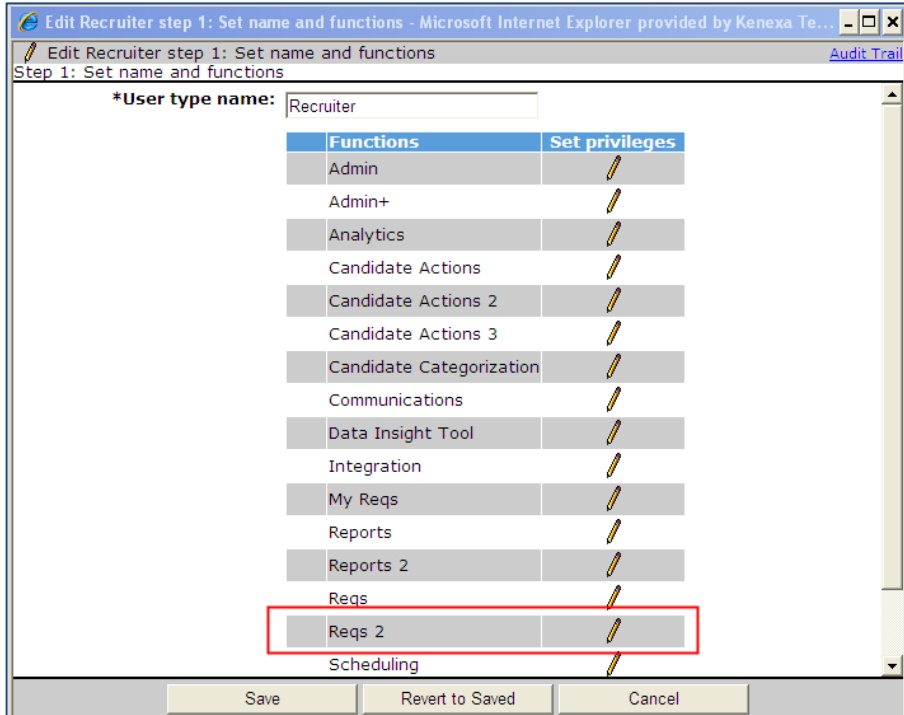
3. Click the **Set Privileges** pencil icon on the Req 2 function. The Req 2 privileges dialog box displays.
4. Select **View all reqs Open menu – hide** and/or the **View all reqs Pending menu – hide** checkboxes.
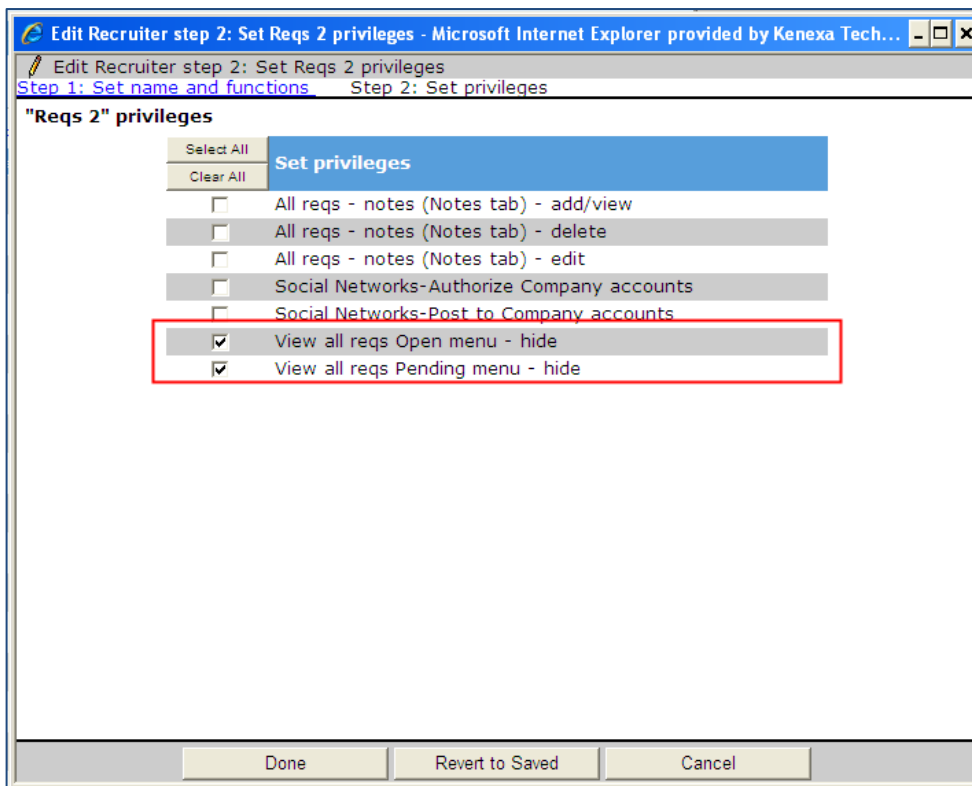
5. Click **Done**. The Set Name and Functions dialog box redisplays a red check mark next to the Function indicates the configuration changes.
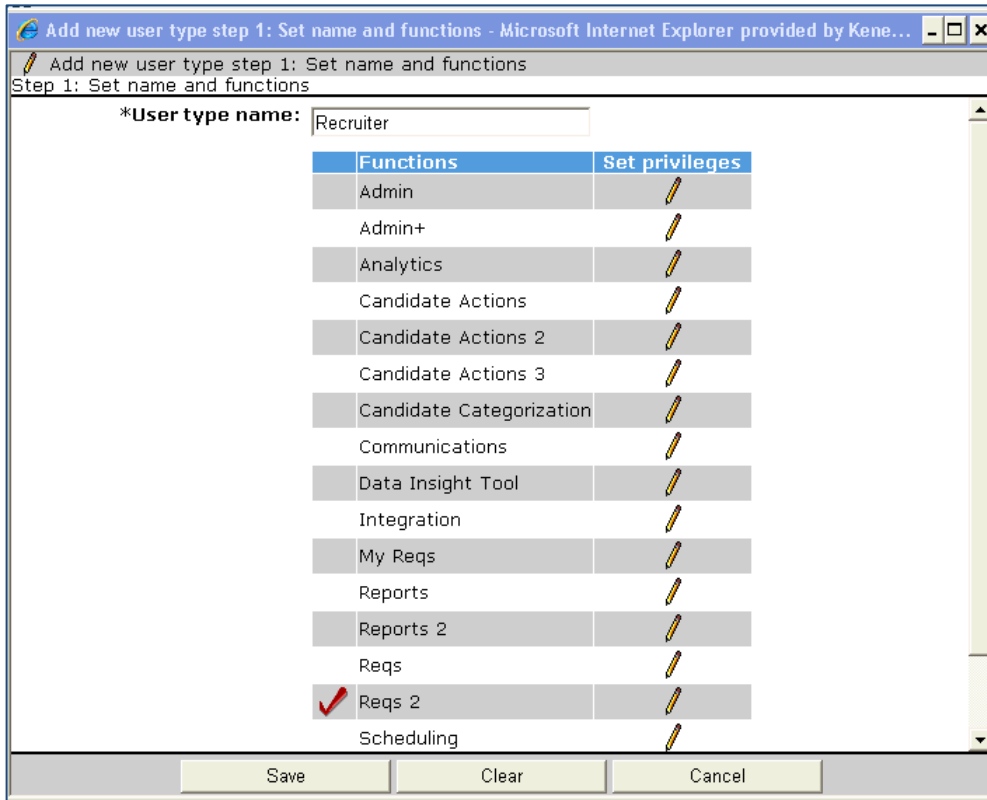
6. Click **Save** to save the new user type privilege configuration.

New UI – Enhancements

Enhancements for the New UI include:

- Requisition enhancements that make using the Req panels even easier   LDP082
- Actions menu available on the Req panels
- Referral fields for display on the Talent Record ribbon
- Persistence for Speed Browse "showing" and tab selections
- Candidate Results panel default sort   LDP072

Product LDP090 Rel 13.0	þ 2x BrassRing þ Workbench Self-Service	þ New UI
Visible Changes	þ Some features require specific conditions / configuration for visibility. For those available automatically, details provided in *Visible Changes* document sent for each release build.	
How do I get this feature?	þ Some features are available automatically; for others, specific conditions required – see details below.	

Feature Description

Release 13.0 included many enhancements affecting, or specifically for, the New UI. They include:

- Requisition enhancements that make using the Req panels even easier   LDP082
- Actions menu available on the Req panels
- Referral fields for display on the Talent Record ribbon
- Persistence for Speed Browse "showing" and tab selections
- Candidate Results panel default sort   LDP072

The following sections provide more information for each area of enhancements.

Requisition Enhancements

The New UI takes advantage of the many requisition enhancements made for Release 13.0:

- Ability to reorder standard and custom fields and set user type field privileges (such as Hide for this User Type) per Req template
- Ability to append or remove Req team members without overriding those already associated with the Req(s), when using the Update Multiple Reqs action (2xB > select multiple reqs > Update
- Ability to shut off all the system standard Req status auto notifications, per Req template
- Display of Req template name on the Req details and Edit req screens, as well availability for display in the Req panels (My and All Open Reqs, My and All Reqs Pending Approval)

Users with the ability to "Edit column display" for Req panels will also see the new Req template name Standard field in the "Edit Columns" widget, displayed in the "Available" fields box when they select "Edit Columns" from the "Display" menu on any Req panel.
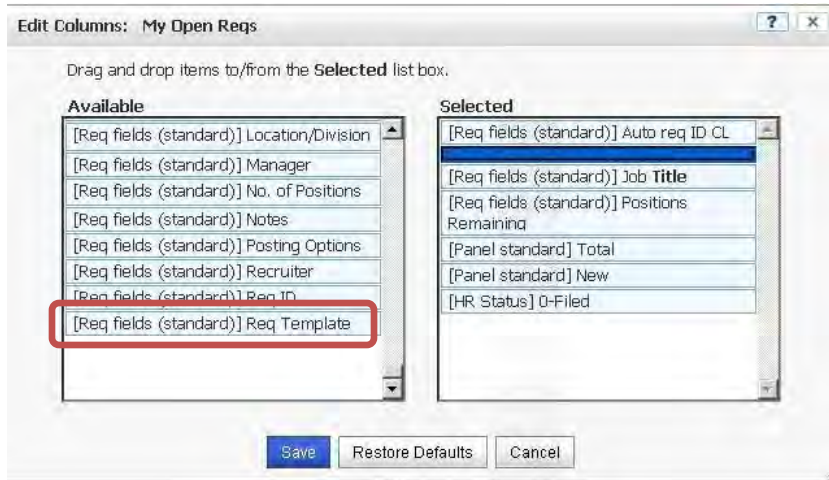
See *Reqs – Requisition Enhancements* in this *Product Update Guide* for detailed information on implementing and using the features.

Actions Menu in Req Panels

All Req panels now have an Actions menu, with all the actions that are available from the classic Actions menu. ("Pending" reqs panels do exclude certain actions, based on classic functionality, inappropriate for that status).
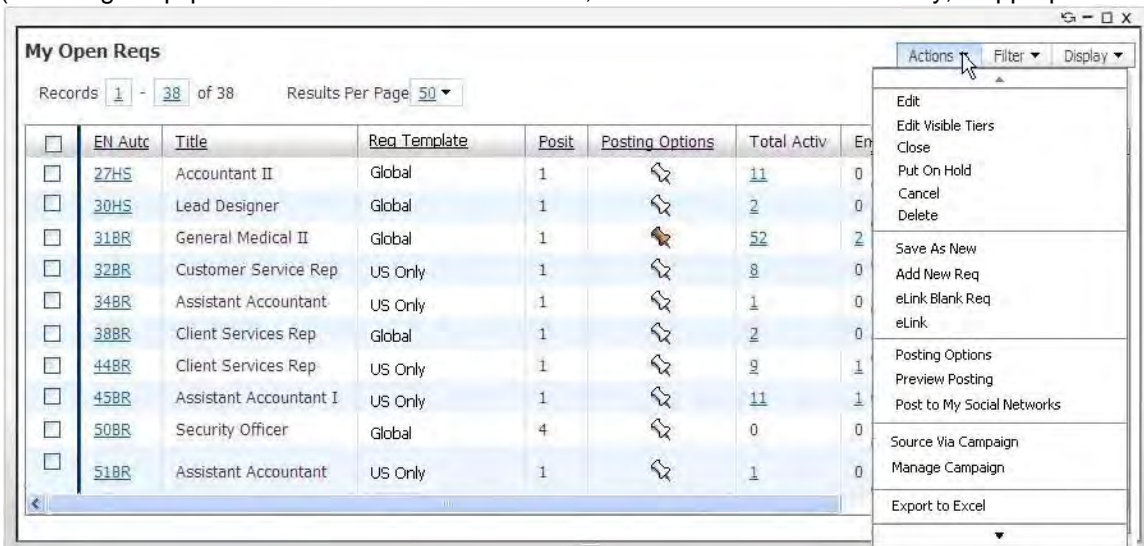
- The classic actions "Edit" and "Update Multiple" have been merged into one action called "Edit" (based on update multiple privilege, the user can select more than one by checking multiple checkboxes)
- All actions honor existing user type privileges (they will not appear when the user does not have the privilege)
- Actions are grayed out when unavailable in the current state (for example, nothing selected, more than one item selected, etc.).

> **Note**: If users update the status of a req to Canceled, On hold, Closed, or Deleted while the Candidate Results panel is open, they cannot then update the candidate's status, either through the inline editor, advanced options, or "Update Status" from the actions menu. The following error message will display in a pop-up (with OK button) and the status WILL NOT be updated:
>
> *HR Status could not be updated because the req status has been changed*

Talent Record Agency Referral and Employee Referral Fields

Additional options for the **Referral type** Ribbon field in the new Talent Record include new links to existing Agency or Employee Referral pages:

- Agency Name
  The existing ribbon field now display as a link (to the View Agency code details page) rather than plain text when present if the user has the appropriate privilege (Admin + > View agency code details).

- Agency - other req
  Displays if an active agency association at a per-req level exists for a different Req than the one being viewed - including viewing the candidate from outside a Req folder (search results, candidates in queue, etc.)

- Agency - expired/removed
  Displays if an agency association at the per-candidate level or per-req level ever existed and was expired or removed. In cases where both "other req referral" AND "expired/removed referral" would apply, "Agency – other req" will display, but the expired information will display on the Agency pop up page.

- Employee Referral Status
  The existing ribbon field will now display as a link (to the Update referral status page) rather than plain text if the user has the appropriate privilege (Candidate Actions 2 > Referral status – update).

- Employee - other req
  Displays if the candidate has been submitted for a req other than the req being viewed (or if the req is being viewed outside a folder and there is no general submission). In cases where the Candidate has BOTH a req specific referral, and a general referral – the req specific information will have precedence and "Employee – other req" will display.

Talent Record Tab Persistence

When a user views a Talent Record in single view or browse/speed browse mode, the tab selection in the middle section persists, remaining selected through logout and future logins, until the user selects another tab.

The Contact Details tab is also now available to be set as the "Default tab" for the Resume/CV section of the Talent Record (set in Workbench).

In addition to the tab persistence in speed browse, the "Showing" selection will also persist until it is changed by the user.
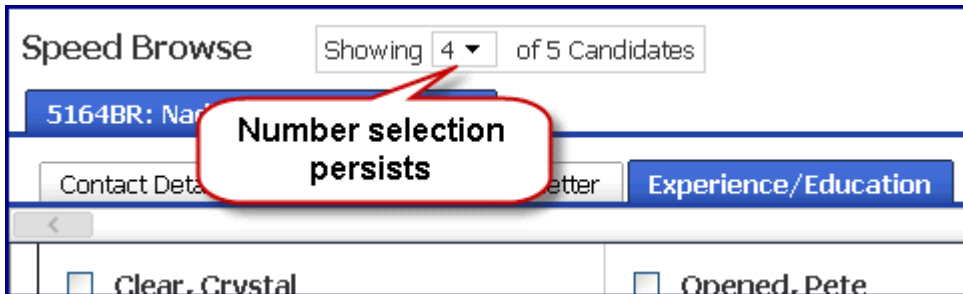
If the number that is selected to speed browse is less than the "Showing" selection, then "Showing" reflects the actual number of candidates selected. This does not become the new persistent selection; "Showing" returns to the persistent number prior to the lower selection.

Candidate Results Panel Default Sort

You can configure up to three default sort fields for the Candidate Results panel. Defining default sort fields for candidates in Req folders enables administrators to comply with the Office of Federal Contract Compliance Program (OFCCP) guidelines. User type privileges determine if default sort options are editable.

Default Candidate Sort requires the configuration of a new panel attribute setting. This feature also includes new, optional user type privileges that allow your organization to restrict access to the 2xB classic UI by hiding Open and Pending reqs menu items (where the default candidate sort settings are not enforced).

See *New UI – Default Candidate Results Panel Sort* in this *Product Update Guide* for detailed information on this feature.

How Do Clients Get this Feature?

Several of these enhancements are available automatically without configuration for clients using the New UI:

- Actions Menu in Req Panels
- Talent Record Agency Referral and Employee Referral Fields
- Talent Record Tab Persistence
- Append/remove Req team members without override when using the Update Multiple Reqs action
- Display of Req template name on the Req details and Edit req screens

The following enhancements are controlled in Workbench Self-Service:

- Reorder standard and custom fields per Req template
- Set user type field privileges (such as Hide for this User Type) per Req template
- Disable system standard Req status auto notifications, per Req template
- Display of Req template name in the Req panels (My and All Open Reqs, My and All Reqs Pending Approval)
- Candidate Results Panel Default Sort
- Talent Record

You can contact your Certified Workbench user or Kenexa Support Team for more information about enabling these features.

Workbench Self-Service Certified Users

Reorder Fields per Req Template

Tools > Forms > Reqs > Req Forms > Administer Req Fields > Select Req Fields
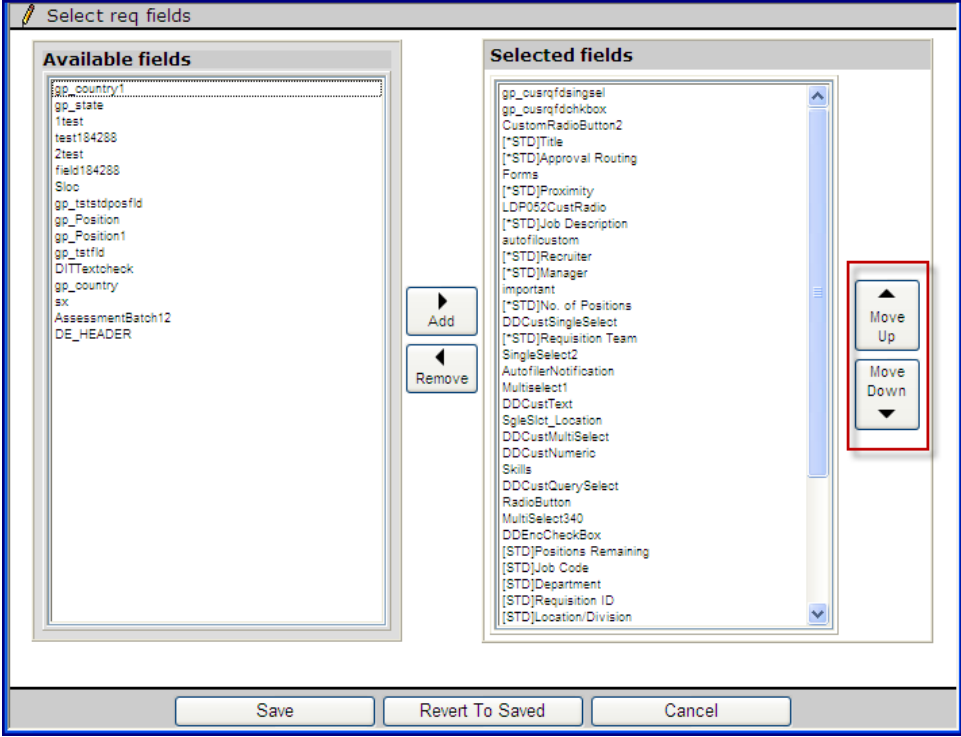
See *Reqs – Requisition Enhancements* in this *Product Update Guide* for more detailed information on implementing this feature.

Set User Privileges per Req Template

Tools > Forms > Reqs > Req Forms > Administer Req Fields > Edit field attributes [for selected field]

See *Reqs – Requisition Enhancements* in this *Product Update Guide* for more detailed information on implementing this feature.

Disable System Standard Req Status Auto-notifications per Req Template

Tools > Forms > Reqs > Req forms > > Edit status notification(s) & addendum form > Disable system standard Req status notifications
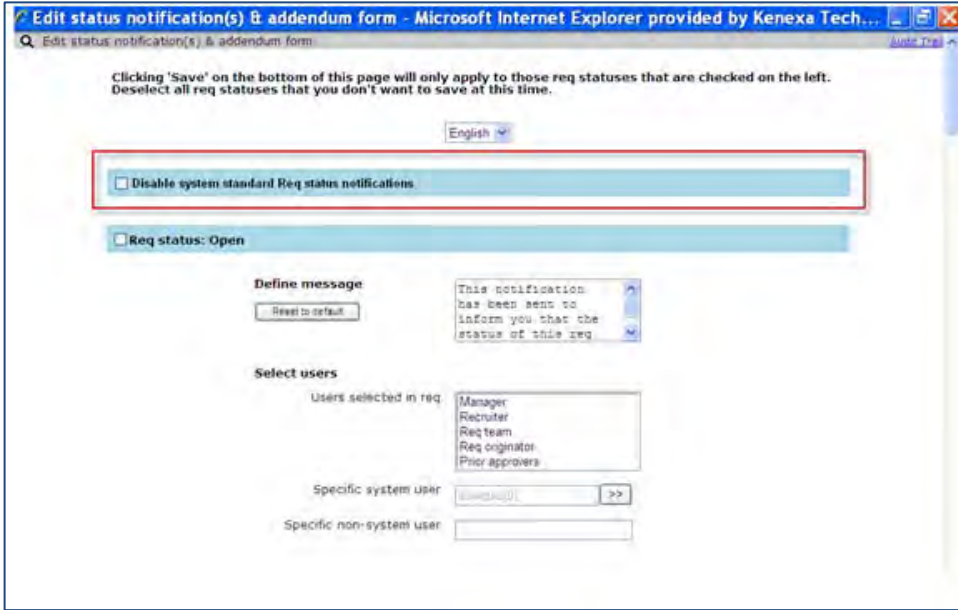
See *Reqs – Requisition Enhancements* in this *Product Update Guide* for more detailed information on implementing this feature.

Display Req Template Name in Req Panels

Tools > Settings > Panel Configuration > Administer configuration [for selected req panel] **> Add new | Edit** [selected] **> Select field >** "**[Panel standard] Req Template**" field
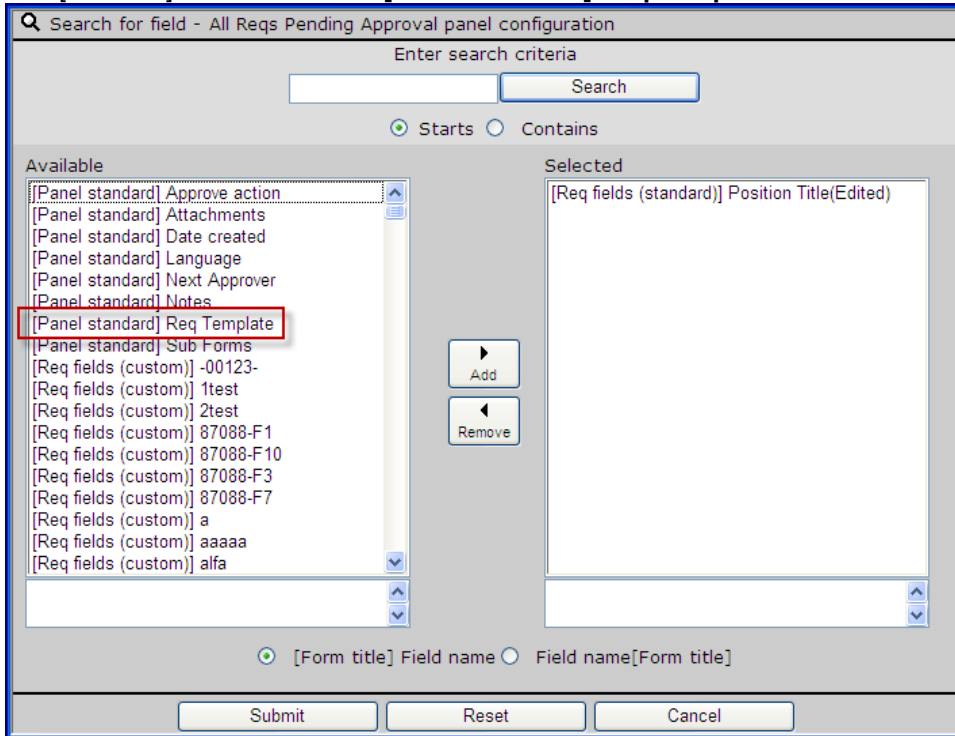
Set Contact Details Tab as Default Tab in Resume/CV Section

Tools > Users > User types > [Select type] **> Screen display defaults >** Expand Resume/CV Section
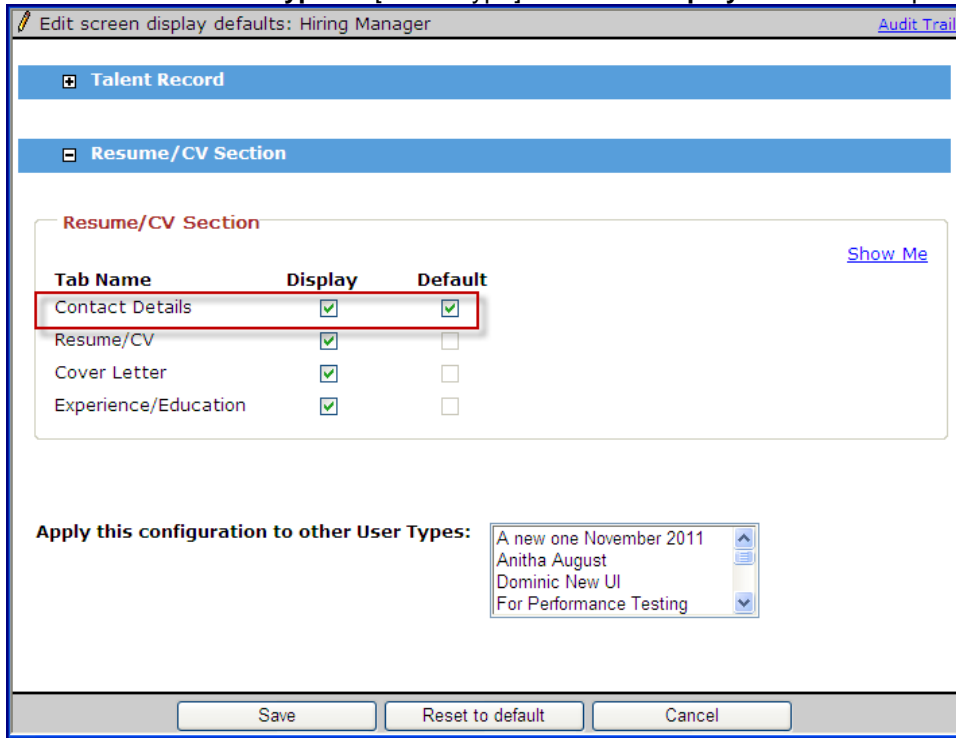
Candidate Results Panel Default Sort

Tools > Settings > Panel configuration > Administer configuration [for Candidate Results] **> Edit** [selected non-Standard configuration] **> Edit** [Panel attributes]

Standard Configurations are excluded from this feature.
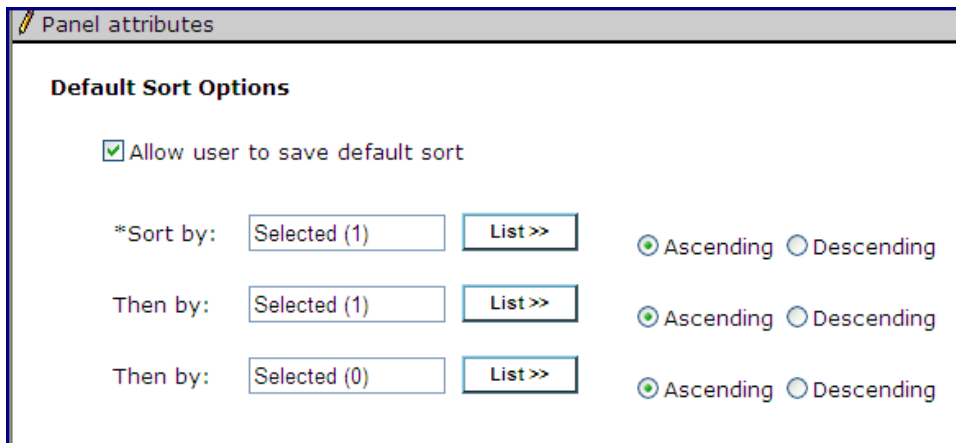
The 2xB user action, Restore Default Sort, restores the default sort back to what is configured for the panel here in Workbench if you check the setting, "Allow user to save default sort."

In conjunction with this feature, you can set Reqs 2 user type privileges to hide pending and open reqs on the classic Reqs menu items **View all reqs** and **View my reqs**:

- View all reqs Open menu – hide
- View all reqs Pending menu – hide

- View my reqs Open menu – hide
- View my reqs Pending menu - hide

When selected, the 2xB menu item "Open" and/or "Pending" under Reqs > View all/my reqs is hidden for the user. Additionally, if the corresponding link is present in the Quick Links panel, it is also hidden.

These privileges were designed to be used in conjunction with the existing "All/My Reqs - View open" and "All/My Reqs – View pending" privileges to allow the user to have access to the All/My Open Reqs and/or All/My Reqs Pending Approval panels, but restrict navigation to the classic equivalent page. However, this dependency is not enforced through Workbench.

See *New UI – Default Candidate Results Panel Sort* in this *Product Update Guide* for detailed information on this feature.

Posting Reqs – Community Gateway Monster Unposts

A new site setting for Community Gateway allows the automatic removal of posted reqs from the main Monster job board when the reqs are removed from the Monster Diversity board.

Product RDP569 Rel 13.0	☑ 2x BrassRing ☑ Workbench Self-Service	☑ Community Gateway - Monster
Visible Changes	☑ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	☑ Configuration required – contact your Kenexa Support Team for implementation details.	

Feature Description

A new site setting for Community Gateway allows the automatic removal of posted reqs from the main Monster job board when the reqs are removed from the Monster Diversity board. The following provides the background for the new setting.

Our posting partner Monster.com made an internal enhancement to their posting environments. The change was that reqs posted to Monster Diversity through Community Gateway were automatically posted to two job boards instead of one: Monster's main board as well as Monster's Diversity board.

Kenexa was unaware of this change for a time, so did not correspondingly modify our process to unpost/delete postings from Monster Diversity. As a consequence, when it was time for reqs to be unposted or deleted, the reqs were removed only from the Diversity job board and not from the main Monster board.

The new "Delete from both Monster and Diversity boards" setting is **Yes** by default. Unless you request a change, 2xB will send modified XML to Monster that requests the removal from both jobs boards when you remove from Diversity.

2xB User Experience

Users continue to post to Monster through Community Gateway in the usual way:

Posting Options > Edit [icon for **Community Gateway**] > **Select job board** [**Monster**]

To unpost from Monster and Monster Diversity (requires **Automatic Posting Removal** be set "Yes" in your site posting destination configuration for Community Gateway):

1. Select **Posting options** from Actions menu for the posted req.
2. On Posting options page, uncheck the Community Gateway checkbox.
3. Select **Update all postings** or **Update newly selected/unselected postings only**, as appropriate.

Postings must be removed manually if **Automatic Posting Removal** be set "No."

How Do Clients Get this Feature?

This feature is controlled by a new Community Gateway site setting. Please contact your Kenexa Support Team for more information about enabling this feature.

Kenexa Tasks

New site setting "Delete from both Monster and Diversity boards" sends modified XML to remove postings from both Monster boards.

Workbench

Tools >Community Gateway > Configure sites

1. Select the client for Configured Clients.
2. Select **Monster** as the Configured Sites value and click **Create New Site**.
   The "**Delete from both Monster and Diversity boards**" setting appears on the ConfigureClients/Modify Existing Site page

Default is **Yes**, send the unpost/delete request to both boards. No continues to send the old XML.

No migration script will be run to clean up orphaned reqs, since we don't have direct access or visibility to Monster's boards. We don't know which req postings are still extant because Monster would have sent us success acknowledgements for previous removal requests.

The client also needs to have Automatic Posting Removal set to Yes (Tools > Community Gateway > Configure Sites) for automatic removal.

Posting Reqs – Update Newly Selected/Unselected Only Button Behavior

The "Save" functionality for "Update newly selected/unselected postings only" button (on the **Edit Posting Options** page in 2xB now works differently when users edit the "Days until posted" or "Days to remain posted" fields.

Product RDP508	☑ 2x BrassRing	☑ Talent Gateways
		☑ Agency Managers
Visible Changes	☑ Yes – details in *Visible Changes* document sent for each release build.	
How do I get this feature?	☑ Automatic – see details below.	

Feature Description

The "Save" functionality for "Update newly selected/unselected postings only" button (on the **Edit Posting Options** page in 2xB now works differently when users edit the "Days until posted" or "Days to remain posted" fields for a Talent Gateway or Agency Manager. (This button is only visible for sites with client setting "Suppress enhanced posting options" set to **No**.)

The Save functionality already saved changes for newly-selected or newly-unselected Talent Gateways (TMs) or Agency Managers (AMs). Now it also saves any changes to Days until posted" or "Days to remain posted" values for *already-selected* TGs or AMs (those that had been previously selected and saved) as well.

Thus, when a user edits the "Days until posted" or "Days to remain posted" values for *any* selected TGs or AMs and clicks **Update newly selected/unselected postings only**, those modified TGs/AMs will be saved, and posting dependencies will be respected following the save (since they were validated in the Posting Options screen).
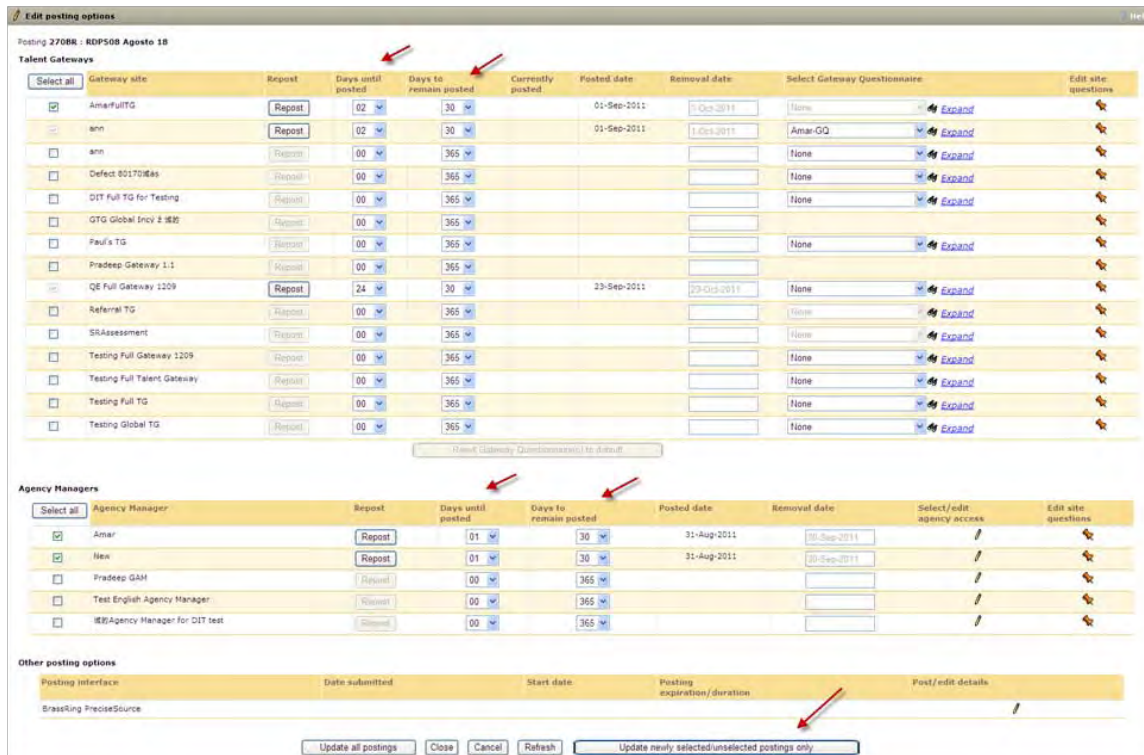
- If validation fails due to posting dependency violations, 2xB displays a warning message so that the user can correct the dependent gateways. A sample message is:

"Please correct the following: The Days until posted for *dependent_gateway_name* Talent Gateway cannot be greater than the days until posted for *gateway_name* Talent Gateway."

- The user should select and edit the gateways listed in the message and click **Update newly selected/unselected postings only** again to save all changes.

Before this change

Previously, when a user edited the "Days until…" or "Days to remain…" values and selected **Update newly selected/unselected postings only**, the postings for the selected Talent Gateways were updated with changes *only for those TGs/AMs that were newly selected or un-selected*. The page would appear to save for any edited TGs/AMs, but "Days" field edits were ignored unless accompanied by selection/de-selection of the TG/AM.

How Do Clients Get this Feature?

This feature is available automatically without configuration for sites with client setting "Suppress enhanced posting options" set to **No**.

Kenexa Internal Notes

Workbench Related Settings:

Admin>Manage clients>Suppress enhanced posting options = No

Tools>Talent Gateways>Admin>Administer posting dependencies

Reqs – Job Code Filtering Enhancement

The page where users select job code filter criteria when adding a req in 2xB now provides the ability to view the filtered job code results, adjust the filter criteria, and select the desired job code, all in the same page.

Product LDP084 Rel 13.0	☑ 2x BrassRing
Visible Changes	☑ Yes – details in *Visible Changes* document sent for each release build.
How do I get this feature?	☑ Automatic for clients using Job Code filtering – see details below.

Feature Description

The page where users select job code filter criteria when adding a req in 2xB now lets them either select the appropriate Job Code on that page and move directly into req creation, or refine the filter and refresh the results set as many times as needed in order to find the desired Job Code, all in the same page.. The user is no longer brought back to the Select Job Code screen.

This job code filtering enhancement is visible for accounts with the client setting: "Job Code Filter" set to **Yes**.

2xB User Experience

The path to the new page is **Reqs > Add new req > Select req form > Select job code.**
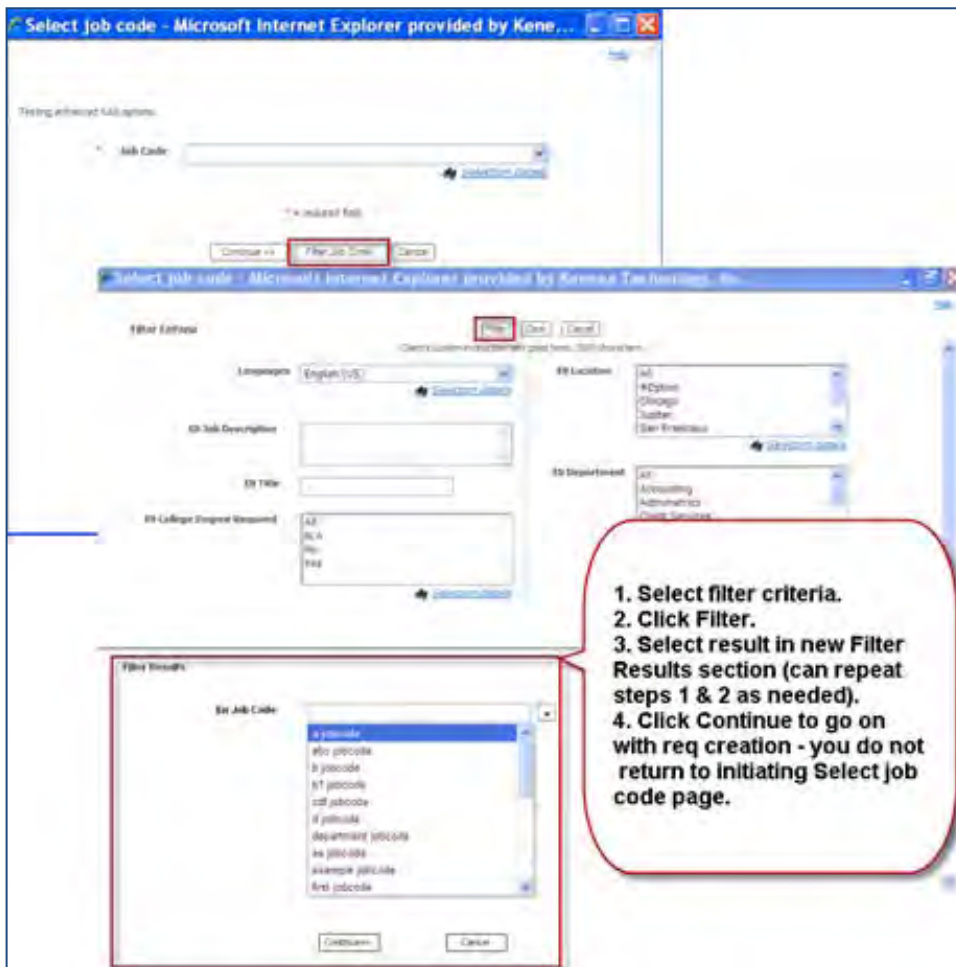
1. Click **Filter job code**. This displays a page with the "Filter Criteria" section at the top and a new "Filter Results" section below.
2. Select filter criteria and click **Filter**.
   Results are shown in the results section. The Job Code box there has auto-filter capability, allowing additional results list refinement. You can make your selection there, or can repeats Step 2 (reset criteria and filter again) if necessary to find the desired job code.
3. Select the job code and click **Continue** to proceed to the Req details page in the Req creation workflow.

With the auto-filter capability, as you type, the results set is further reduced to display only those items beginning with the letters you type, as shown below.
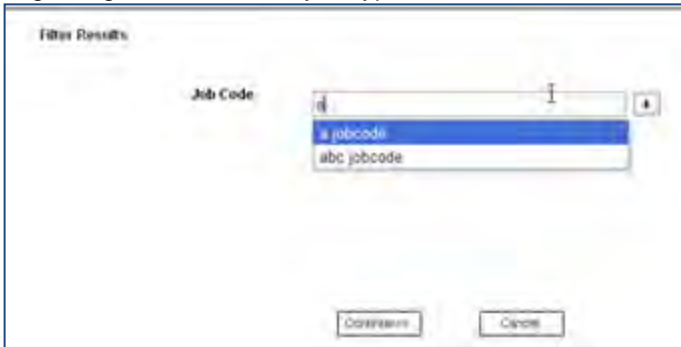
When the results set exceeds 200, only the first 200 items display, with the message:

"Over 200 job codes were found. Only the first 200 items will be displayed. If you do not find the required job code, please refine your filter criteria and try again."

You can refine the filter to further refine or refresh the results set until you find the job you are looking for.

How Do Clients Get this Feature?

This feature is available automatically without configuration to clients with the client setting: "Job Code Filter" set to **Yes**.

Reqs – Requisition Enhancements

This feature adds requisition enhancements including the addition of the Action Menu to the req panel in the New User Interface (UI). Other enhancements include the ability to: re-organize custom and standard fields on a requisition template; to hide or remove custom and non system-required standard fields; and to add or remove req team members on a requisition without overriding those already associated with the req. Additional enhancements include the ability to disable system standard req status auto notifications and set field privileges at the requisition template level.

Product LDP082 Rel 13.0	þ 2x BrassRing þ New UI	þ Workbench Self-Service
Visible Changes	þ Yes – details in *Visible Changes* document sent for each release build.	
How do I get this feature?	þ Specific conditions required – see details below.	

Feature Description

This feature introduces several requisition enhancements that do not require any configuration. The following are visible requisition User Interface (UI) changes:

- The requisition template name displays on the Req details and Edit req screens, and is available for display in all Req panels.
- Action menu now available in all Req Panels.
- 2xB users can add or remove requisition team members without overriding those already associated with the Req when using the Update Multiple Reqs action.

Configurable requisition enhancements include the following items:

- Standard and custom requisition fields can now be re-positioned on requisition templates.
- Standard field privileges can be set at the requisition template level.
- System standard req status auto notifications can be shut off per requisition template.

Requisition UI

The requisition template name now displays on the Req details and Edit req screens, and Req panel and in those pages related to eLinks.
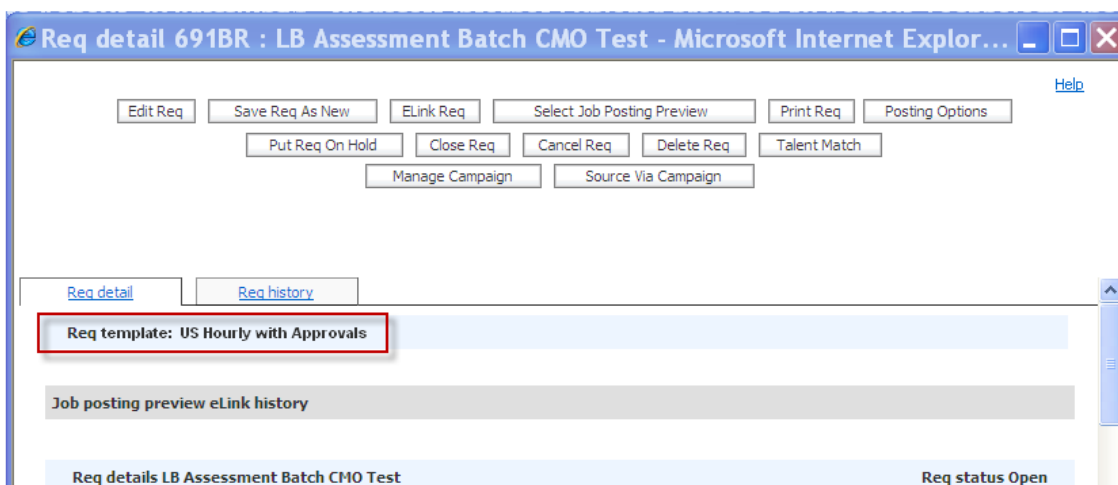
The Action Menu is available in all Req Panels.
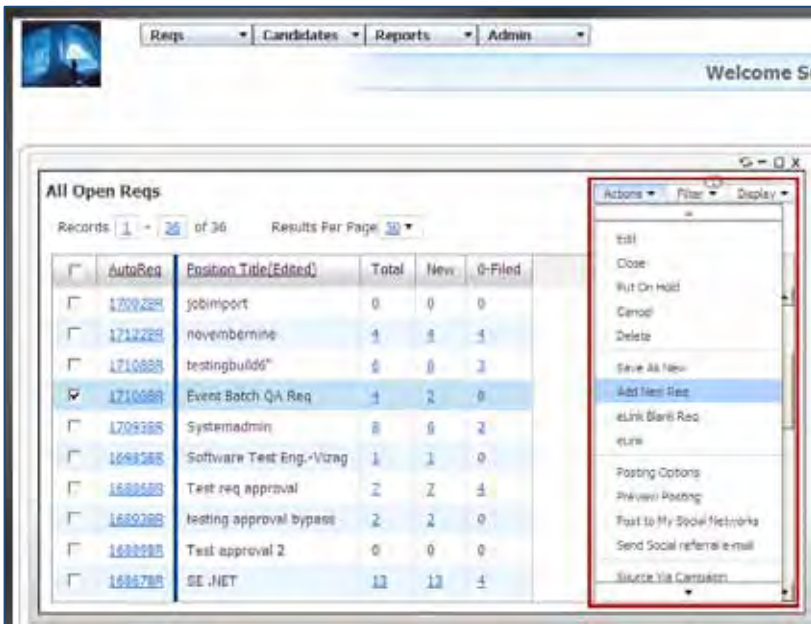
Requisition Enhancements

Repositioning Standard and Custom Requisition Fields

2xB users can now access requisitions more tailored to meet their particular recruiting needs. Template administrators can now define field placement per req template for both standard and custom fields via the Select Req Fields page.

Setting Standard Field Req Privileges

Template administrators can now set display options according to user type privileges on standard req fields when creating or editing requisition templates.

On the **Update multiple reqs** page (select multiple reqs->Update), two new options are available when selecting users to add as Req Team members: "Overwrite existing" and "Append to existing" (described below). This change allows easier update of multiple Reqs to append or remove an individual team member from all the selected Reqs, with the option to overwrite the existing members or to preserve them.

- **Select to Add to Requisition Team**
  The new radio button options are available here, with a list of all the system users. This list does not display any users as pre-selected, regardless of whether or not they are a current Req Team member. Options include:
  Overwrite existing – completely removes existing Req Team members, replacing with the new members for the multiple reqs
  Append to existing – keeps the existing Req Team members and adds the new members

- **Select to Remove from Requisition Team**
  This list displays all users who are included in the Req Team on at least one of the selected reqs.

To add some members and delete some members at the same time, select the appropriate names in "Select to Add To Requisition Team" (users selected in this control will be added) and "Select to Remove from Requisition Team" (users selected in this control will be removed).

For more than 200 users, scaled select text boxes will continue to be displayed, but the new options are available.

Configuring System Standard Auto Notifications

System standard status auto notifications can now be shut off at the requisition template level. These auto notifications include the open status and the saved req to approved reqs notifications which do not have any configuration tied to them, they are system generated. Both notifications are sent to all req team members.

Limitations and Known Issues

Updates to Multiple Reqs: Updates will need to be made to individual fields; JCDD, RFA, etc. will not be triggered by an update to a parent field.

How Do Clients Get this Feature?

The UI features do not require any configuration. 2xB users with req privileges can update multiple reqs. The other req features are configured by WBSS users. Please contact your Kenexa Support Team or certified Workbench Self-Service user for more information about enabling these features.

Workbench Self-Service Certified Users

In Workbench, standard and custom req fields now display on the Administer Req Fields screen. System required standard fields are marked with an asterisk and cannot be removed or hidden on req forms. When the Administer Req Fields screen first displays, it displays only the custom req fields associated with existing requisitions. After a user saves the Select Req Fields screen (regardless of modifying the data), the Administer Req Fields screen refreshes and displays both standard req fields and saved custom req fields. System standard fields can be re-ordered but not removed.

When editing field attributes, WBSS users can use the Placement option (an active drop-down list) and specify the order of fields on the requisition form. Positioning can also be completed for multiple req fields at once via the Select req fields page. WBSS users can also set privileges for standard req fields when editing field attributes, including Hide for these users types, Hide in these languages, Require for these user types, and Require in these languages.

Editing Field Attributes – Positioning and Hide/Display

1. **Tools > Forms > Reqs > Req Forms > Administer Req Fields**
   The Administer Req Fields screen displays listing standard and custom req fields. The fields marked with asterisks are system required fields and may not be removed or hidden on req forms.
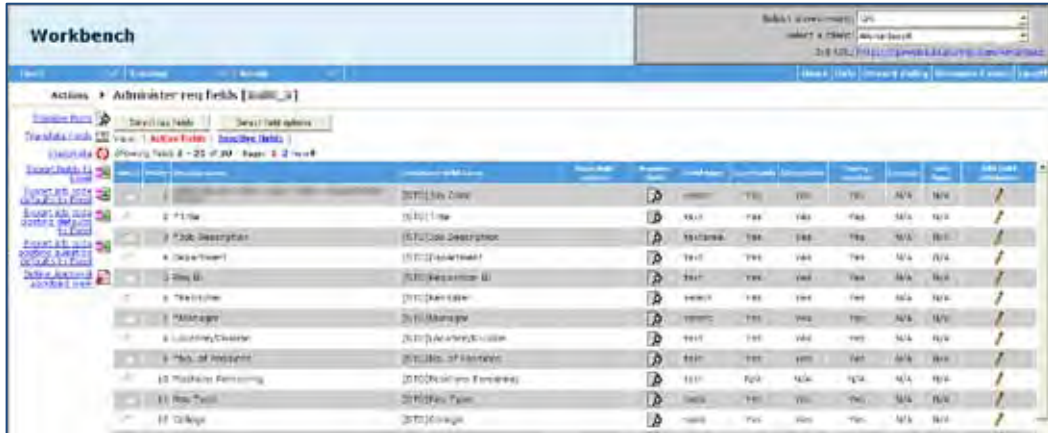
2. Click **Select Req Fields**.
   The Select req fields page displays.
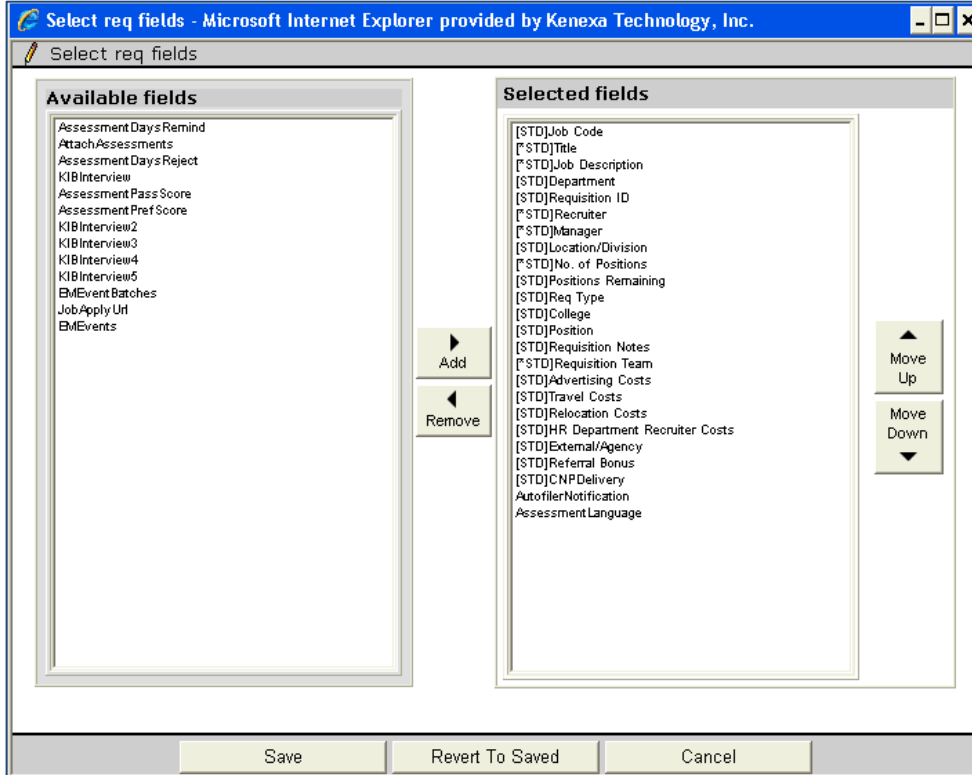
System standard non-required and custom fields display in the Available column. The prefix [STD]. identifies

non-required standard fields. The prefix [*STD] (with an asterisk) identifies system standard required fields, which cannot be removed or hidden. By default, all standard fields display under the Selected fields column until, in the case of non-required standard fields, they are removed to Available fields and the data is saved.

3. Click **Add** or **Remove**
4. Order the selected fields as desired using **Move up** and **Move down**.
5. Click **Save**. Administer req fields page refreshes and redisplays.

Setting Req Field Privileges per Template

1. **Tools > Forms > Reqs > Req Forms > Administer Req Fields**.
   The Administer Req Fields screen displays listing standard and custom req fields.
2. Click the **Edit field attributes** icon on the field for which you want to set privileges, such as Hide or Require.
   The Edit field attributes dialog box displays.

3. Select user type in the appropriate section, such as **Hide for these user types** if you want to hide a req field.
4. Click **Save**.
5. Repeat Steps 2 through 4 for each desired Req field.
6. Click **Save**.

Disabling Req Status Auto Notification

WBSS can now turn off system standard req status notifications on a template level.

1. **WB > Tools > Forms > Reqs > Req forms > Edit status notification(s) & addendum form.**
   The Edit status notification(s) & addendum form screen displays:

2. Select the checkbox next to **Disable system standard Req status notifications**.
3. Click **Save**.

Reqs and Candidate Forms – Inactive Options in Edit Mode

Organizations can now choose to display inactive options for 2xB users editing reqs and candidate forms, so they are able to see an inactivated option that had been *previously selected* (when it was still active).

Product **RDP534 Rel 13.0**	☑ 2x BrassRing
Visible Changes	☑ No – requires specific conditions / configuration for visibility.
How do I get this feature?	☑ Configuration required – contact your Kenexa Support Team for implementation details.

Feature Description

A new client setting allows you to display inactive options for 2xB users editing reqs as well as candidate forms, so they are able to see an inactivated option that had been *previously selected* when still active. The setting is "Display inactive options in edit mode for Reqs and Candidate forms." When enabled, 2xB users editing the forms will see field options that have been inactivated, with the status indicator "(Inactive)" appended to them.
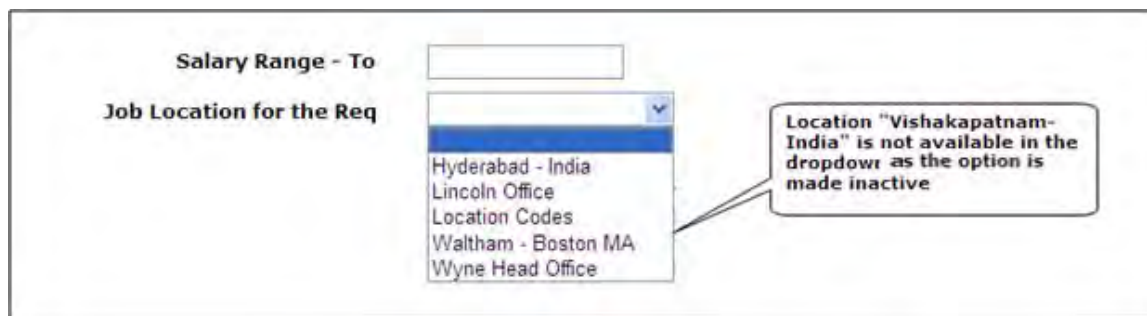
Before this change, users could see an inactive value only when *viewing* the form:

…but not when *editing* the form:
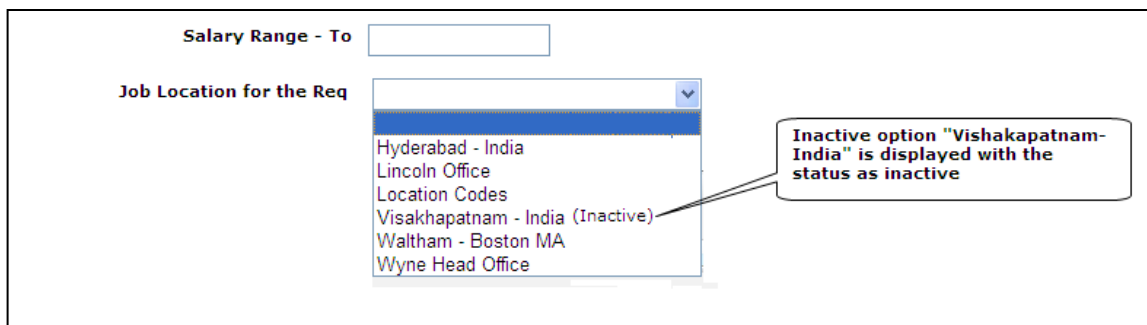
Now users see the inactive option, *and can also re-select it* when it's necessary to save the form with other edits while still preserving that now-inactive choice (for reporting or other reasons).

Example

Assume that "Salary Range – To" and "Job Location for the Req" are required fields in the preceding figure. Users can:

1. Update the field "Salary Range – To."
2. Re-select the option "Vishakapatnam – India (Inactive)" under "Job Location for the Req"
3. Save the form with the new salary without having to change the location.

2xB User Experience

When the new setting is enabled, 2xB users see the inactive fields in the following workflows:

- Edit Req
- eLink Req in edit mode
- Req Approval in edit mode
- Talent Record -> Forms -> Edit form
- Talent Record -> Forms -> eLink form in edit mode
- List filtering – for a question with list filtering, options made inactive are populated in edit mode.

> For User types: Users are not inactivated until their responsibilities have been transferred to an active user for all associated Reqs. Hence, inactive users such as recruiters and hiring managers won't display when 2xB users edit forms. However inactivated approver users do appear with **(Inactive)** appended.

Limitations and Known Issues

Following workflows are not affected:

- Smart approval: users don't edit/update the req in SmartApproval, hence no impact.
- Candidate form approval: candidate forms cannot currently be edited while in approval.
- Job Code Default Data: inactive options in JCDD aren't reflected when creating a req.
- Req Field Association: if an option of a parent question is made inactive, that option won't be populated, affecting the corresponding child options as well.
- Candidate forms in draft mode.
- Req forms in save as draft/new mode.
- My Req defaults.

Display of inactive options is applicable only for Reqs and Candidate forms; does not apply for subsidiary forms, addendum forms, or any other type of forms.

How Do Clients Get this Feature?

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

Kenexa Tasks

A new client setting."Display inactive options in edit mode for Reqs and Candidate forms," enables this feature.

Workbench

New WB client setting **Display inactive options in edit mode for Reqs and Candidate forms**

WB>Admin>Manage Clients>Edit client settings>in the client settings section

When the WB client setting is set to **Yes**, inactive options are displayed for 2xB users editing reqs and candidate forms, so they are able to see an inactivated option that had been *previously selected* when still active). The status "(Inactive)" is appended to the value.

When set to **No** (the default), if an option is made inactive, it is shown in View mode and is not shown in Edit mode., per current functionality.

The feature applies to:

- most option/question types, including radio button, check box, query select, single-select and multi-select (auto-fill support is pending - build to be assigned)
- field types that include Req Standard fields, Req Custom fields (including user-lists like Recruiter, Hiring Mgr, Req Team etc) and Candidate form fields, both non-encrypted and encrypted fields.

Rules Automation Manager – Internal Feature

The Phase 4 version of the User Guide is posted on the Release 13.0 launch site:

http://www.kenexanet.com/sites/plp/2xB13/Shared%20Documents/Enablement%20Slides/RAM_UserGuide_1-3-12.docx

The document contains material to guide a Workbench user on the creation and maintenance of Rules Automation Manager (RAM) triggers. Release 13.0 Phase 4 contains additional automated functionality to further streamline the hiring process:

- Condition for comparing different field types
- Trigger on req subsidiary forms
- Req subsidiary form fields are available for selection in within conditions and actions
- New action category for Update Req Tier
- Concatenate multiple fields together within actions
- Ability to search and analyze log files

Product LDP015 Rel 13.0	þ 2x BrassRing	þ Workbench Internal
Visible Changes	þ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	þ Configuration required	

The RAM is quite flexible and can solve many business problems. It is important to take caution when creating and editing triggers. RAM equires the hidden client setting to be turned on. Please refer to the **RAM Process Document** for information about the overall process involved:
http://www.kenexanet.com/sites/plp/2xB13/Shared%20Documents/Enablement%20Slides/RAM_Process_Enablement_13.docx

The **Enablement slide presentation** is here:
http://www.kenexanet.com/sites/plp/2xB13/Shared%20Documents/Enablement%20Slides/LDP015%20-%20RAM%20Phase%204.pptx

SmartApproval - Enhancements

This feature introduces three enhancements to the SmartApproval workflow including a warning alert for incomplete role assignment configuration, automatic update and synchronization of requisition status changes (Cancel, Decline, Put on Hold) for SmartApproval reqs, and Approval Checkmark functionality change.

Product LDP051, Rel 13	þ 2x BrassRing	þ SmartApproval
Visible Changes	þ Yes – details in *Visible Changes* document sent for each release build.	
How do I get this feature?	þ Automatic – see details below.	

Feature Description

This feature introduces three enhancements to the SmartApproval workflow:

- A warning alert during the role assignment process for incomplete configurations
- Update and synchronization of req status changes (Cancel, Decline, Put on Hold) for SmartApproval reqs
- Access from 2xB requisition folders to view and execute SmartApproval approve/decline

Warning Alert

When 2xB SmartApproval administrators assign roles, values must be entered for the three code boxes (1, 2, and 3) and the wildcard checkbox must be checked. If any of the required fields are not completed, a warning alert displays.

Automatic Update and Synchronization of Requisition Status Change

For requisitions created and defined (workflow) in SmartApproval, status changes of Cancel, Decline, or Put on Hold now automatically update in both SmartApproval and 2xB.

For example, a requisition is created, defined, and initiated in SmartApproval (pending status in 2xB). The status of this req is "Pending" in 2xB. If the requisition is Canceled (or Declined or Put on Hold) in 2XB before approval routing has begun, the first approver automatically receives an email notification.

1. The first approver clicks on the **Click Here** hyperlink in the email notification and the Approval View page displays with the updated requisition status and a system error message displays in the Comments section.
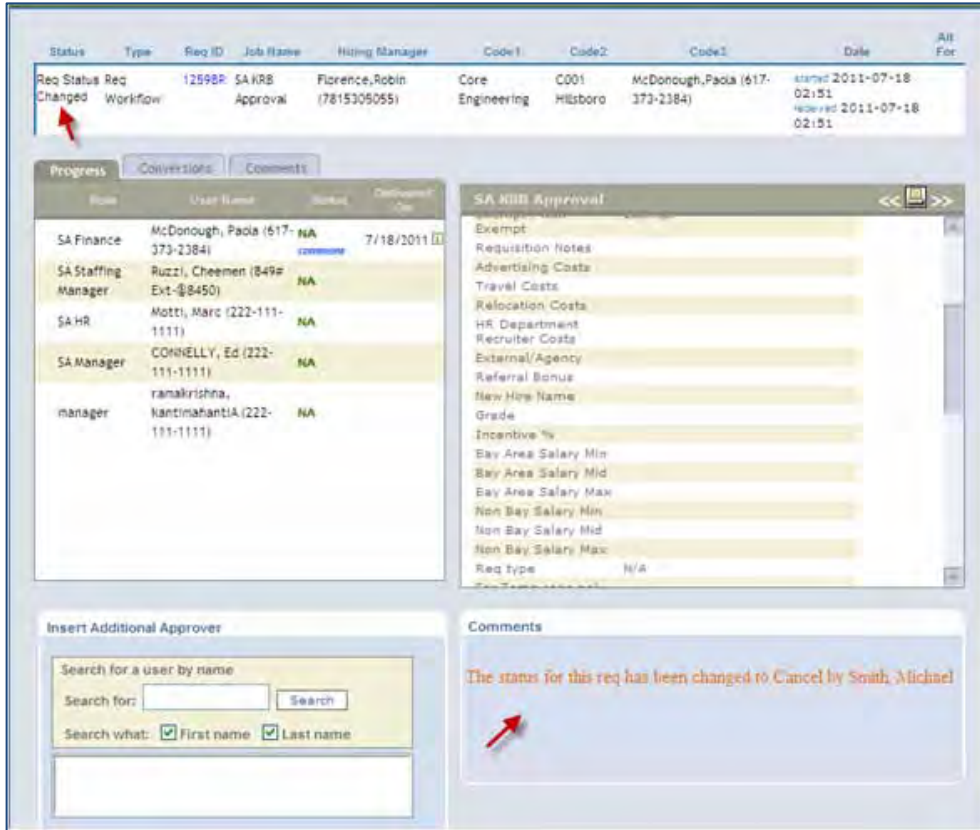
2. The second approver on the approval list receives an email notification of the requisition status change.
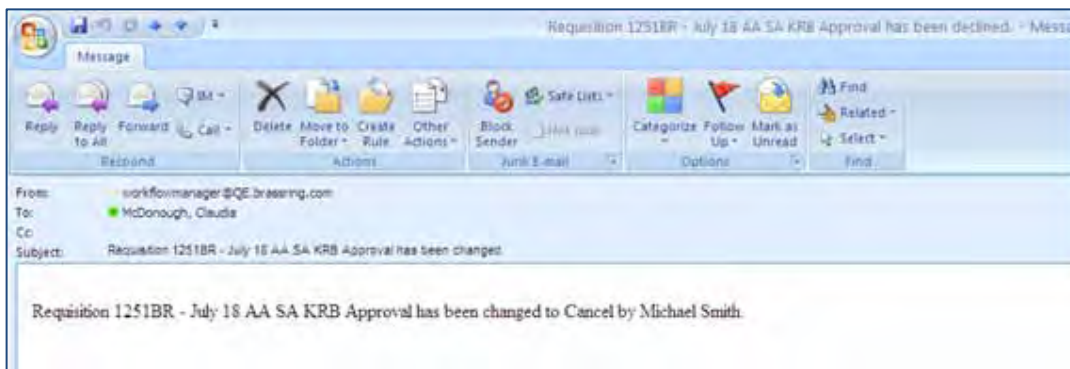
Note: Only the *first* status update in 2XB from Pending to any of the following: Cancel, Decline or Put on hold displays in the New Smart approval status message. Any update after this will not be reflected in the New Smart approval status message.

If an approver views the Approval workflow via 2xB or SmartApproval by clicking on View Approval on the Req Details page, the updated SmartApproval status displays in the status column on the Approval View page.

If an approver views the Approval workflow via 2xB or SmartApproval by clicking on View Approval on the Req Details page, the comments tab for SmartApproval displays the user name of the last user who updated the status of the req. The User Name Differentiator client setting must be enabled to display the user name.

- If other approvers access the Final Status section of the Approval screen (either in 2xB or SmartApproval) the changed requisition no longer displays in the Active Workflow section, but displays on the Final Status section and the Req Status column displays a new icon 🔴 indicating the Req Status

Approval Checkmark Functionality Change

In the New User Interface (UI) in either the "My Reqs Pending Approval" or"All Reqs Pending Approval" folder, 2xB users can now approve or decline requisitions using SmartApproval.

In either a "My Reqs Pending Approval" or"All Reqs Pending Approval" folder, 2xB users see a checkmark in the approval column of the requisition.

When a 2xB user clicks the checkmark, the Approval View screen in SmartApproval launches.

When a 2xB user Approves or Declines the requisition from the Approval View screen, the requisition status dynamically updates in SmartApproval and in 2xB.

How Do Clients Get this Feature?

These three SmartApproval enhancements require no configuration and are available automatically to clients with SmartApproval.

Social Media – Buttons on Talent Gateway Job Details Page

This feature makes social media buttons available for your Talent Gateway Job details page. Buttons currently available to sites using 2xB's social media features include Facebook's "Like" button, Twitter's "Tweet" button, and LinkedIn's "Share" button.

Product RDP575 Rel 13.0	☑ 2x BrassRing ☑ Talent Gateways	☑ Social Media Integration
Visible Changes	☑ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	☑ Specific conditions required – see details below.	

Feature Description

This features provides the option to include social media buttons on the TG job details page, including:

- Facebook's "Like" button
- Twitter's "Tweet" button
- LinkedIn's "inShare" button.

The new Talent Gateway (TG) "Social media integration - show share buttons on job details page" setting controls whether the social media buttons display.

When set, clicking the buttons on the TG's Job details page launches a pop-up window requesting the candidate to log into the corresponding site. Once the candidate logs in, the related action is or can be performed.

Candidate Experience

When the feature is enabled, **Like**, **Tweet**, and/or **inShare** buttons display during the candidate's application process as shown in the following screenshot.

The count for the social media site is displayed beside the button when greater than zero.

For example:
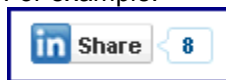
Facebook 'Like'

1. Candidate clicks **Like** button.
2. Facebook login/register page pops up if the candidate is not already logged in.
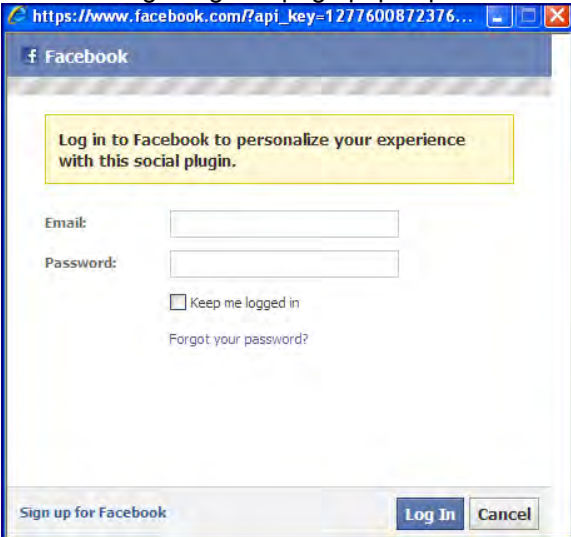
3. After login, Facebook shows that the user "likes" the job on the Facebook wall. Candidate can optionally add a message in the provided text box and click **Post to Facebook**, or click **Close**.
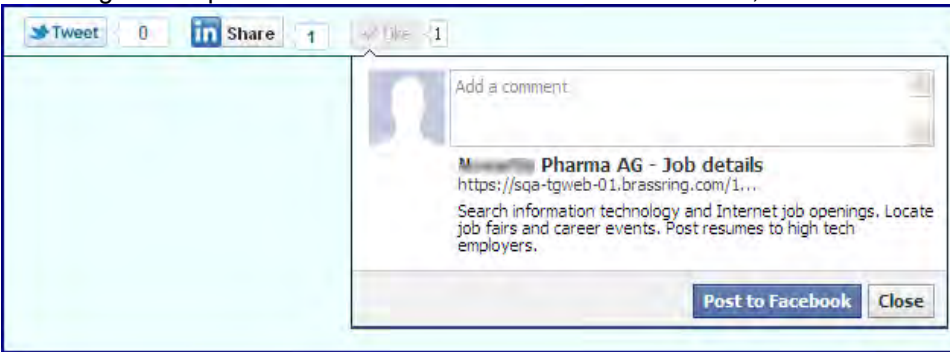
Twitter 'Tweet'

1. Candidate clicks **Tweet** button.
2. Twitter login/register page pops up if the candidate is not already logged in.

3. After login, the pop-up shows a preview of the content to be shared.
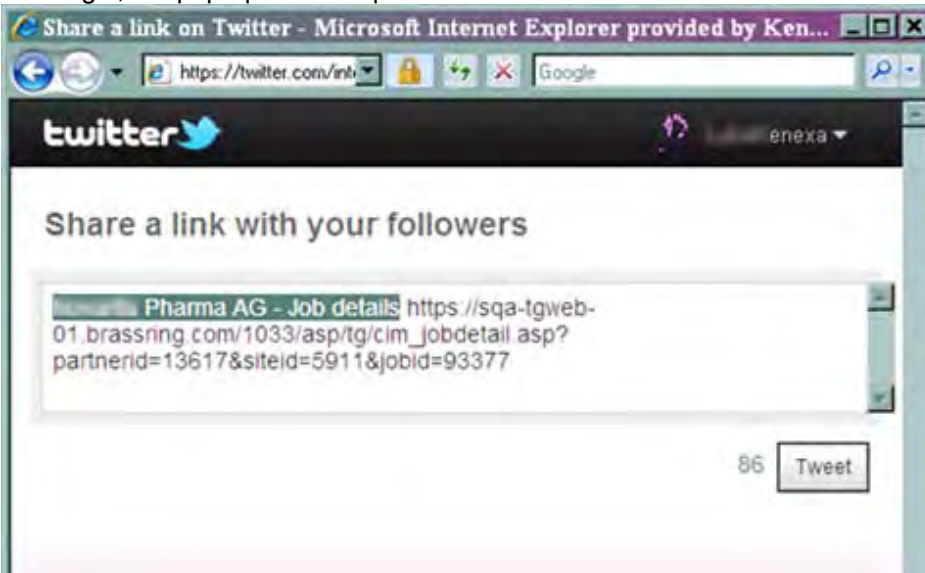
4. Candidate clicks **Tweet** to post the content to the user's page.

LinkedIn 'inShare'

1. Candidate clicks the 'inShare' button.
2. LinkedIn login/register page pops up if the candidate is not already logged in.

3. After login, the pop-up shows a comment box for the content to be shared.
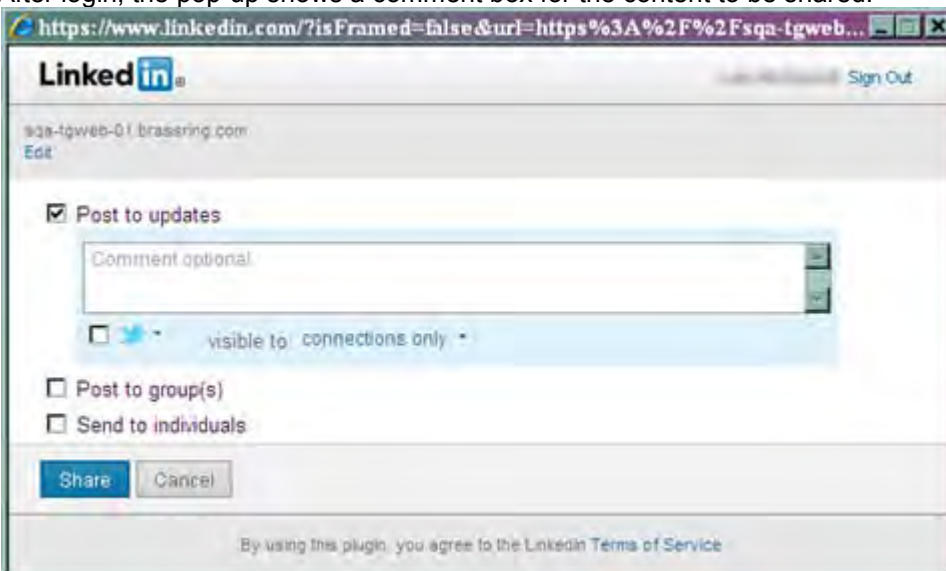
4. Candidate enters content, then clicks **Share** to post the content to the user's page.

How Do Clients Get this Feature?

For clients with the **Enable Social Media integration** client setting set for one or more of the social networking sites, these buttons are controlled by a new TG setting. Please contact your Kenexa Support Team or Certified Workbench User for more information.

Workbench Self-Service Certified Users

The Talent Gateway (TG) setting "Social media integration - show share buttons on job details page" is available for full TGs if at least one social networking site is selected for the TG.

Requires Tier 5 certification to set the new setting in:

Tools > Talent Gateways > Admin > Add new Talent Gateway | Edit [selected TG]

- Select **Yes** to display social media button(s) for on the TGs Job Details page.
- **No** (the default) does not display the social media buttons on the Job Details page.

Only the social media button(s) corresponding to the sites selected in "Social Media Integration" display on job details. For example, if Facebook and Twitter are the sites selected in "Social Media Integration," when this new setting = Yes, Facebook's **Like** and Twitter's **Tweet** buttons display on the TGs Job details page.

- For global TGs this new setting is handled at the individual full gateway level only.
- Localization of the social media buttons –the buttons will need to be localized using API in the locale of the TG. If that locale is not supported by the social media site, English (US) will be used as the default.
- New setting will not affect the Profile import from Social Media sites and other profile builder functionalities with respect to social media. This will affect only the social media buttons on Job Details page.

Best Practice Recommendations

"Post to my Social network(s)" button is used to track the social referral details, whereas these social media buttons are just to share information about the Job details page. We recommend you enable only one of these two TG level settings.

Social Media – Candidate Source

This feature introduces a social media referral email functionality that captures and stores candidate social media source information (site origin and job submission details) for candidates successfully completing job submissions. Using social media email referral functionality, clients can now send emails to recipients containing links to job posting details and social media posting options. Candidate social media source information can be included in Data Insight Tool (DIT) reports.

Product	þ 2x BrassRing	þ Talent Gateways
RDP087 Rel 13.0	þ Workbench Self-Service	þ Social Media
Visible Changes	þ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	þ Configuration required – contact your Kenexa Support Team for implementation details.	

Feature Description

The social media referral email functionality uses the social media referral merge token in email templates to send links to job posting details and social media posting options for up to five reqs. The social media referral merge token ([#socialref: social referral link#]) represents the req ID and job title and contains two hyperlinks; one to the job details page (Req ID) and one to post to the recipient's social networks. Email recipients can view the job details page and then post to their social networks or directly post to their own social network sites without viewing the job details page. Email recipients can be system or non-system users.

Using the social media referral email feature allows clients to capture and report on social media source information in a candidate's Talent Records (TR) for all candidates successfully completing job submissions. Candidate social media source data can then be included in Data Insight Tool reports.

Social media source information includes:

- social media site origin (LinkedIn, Facebook, and Twitter)
- type of social media account (corporate, personal, group)
- job posting req ID
- job poster information, identifiers (name and email)
- source type of job poster (2xB user, non-2xB user, candidate, employee)
- date of submission

2xB Experience – Social Media Referral Email

In the following example, 2xB users with the new user type privileges for this feature access and use the social media referral email function.

> Note: All reqs selected for the referral email must be in Open status and posted to at least one Talent Gateway. Secure reqs cannot be posted to social networks.

To use the social media referral email template:

1. In the req folder or Open Reqs panel, select **Reqs > View all reqs > Open, Reqs.** You can select up to five open reqs.

   Select **Send Social Referral Email** from the Actions menu.
   The Send Social referral email form displays with selected reqs checked (default). Uncheck reqs to exclude them from the referral email. Checking the **AutoReq** checkbox selects all the reqs in the list.

2. Select the Social Referral email template.
3. Enter recipients' email addresses and **Subject** line text. The View List option, which lists all the personal email lists you've created, is available for primary (To) and secondary (CC) personal emails.
4. Click **Preview.** Make changes if necessary. Click **Close**
5. Click **Send**.
   A confirmation displays.

Recipient receives email.

Posting to Social Networks Options

There are two options for posting jobs to social networks for email recipients. Email recipients can view the job details page and then post to their networks or they can directly post to their networks. Email recipients are not required to log into the Talent Gateway (TG), but name and email address entries are required.

Viewing Job Details Page

1. To view the job details page, recipient clicks the **Req Id hyperlink** link in the email.

2. Recipient selects **Post to My Social Networks.** .
   The TG login page displays.
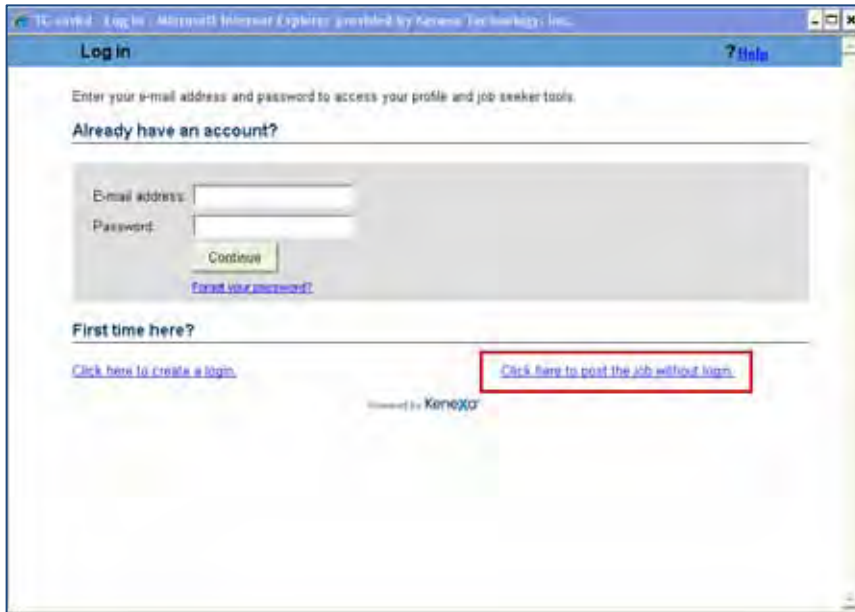
3. Recipient can log in to the TG or select **Click here to post the job without login**.
   The **Post to My Social Networks** screen displays.
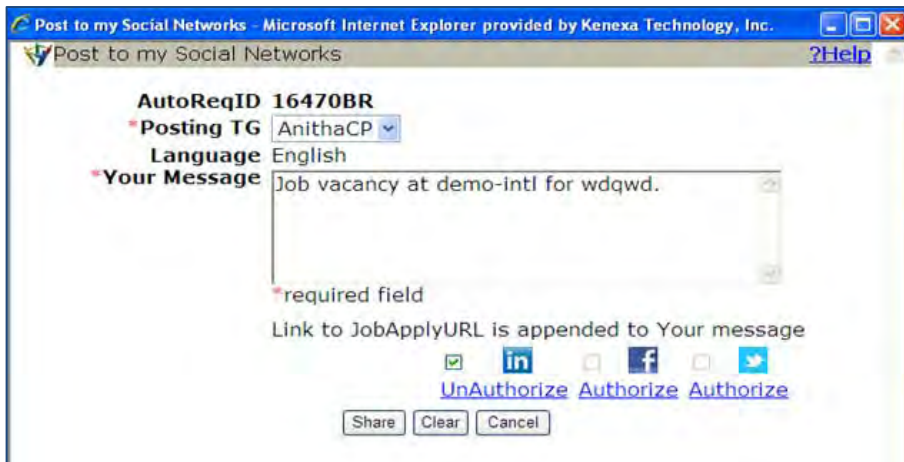
4. Recipient completes the posting message, selects their social media networks for posting, and clicks **Share** to post the job.

Posting Directly to Social Network

1. Recipient selects **Click Here** in the email to post to their social network.
   The **Post to My Social Networks** displays.
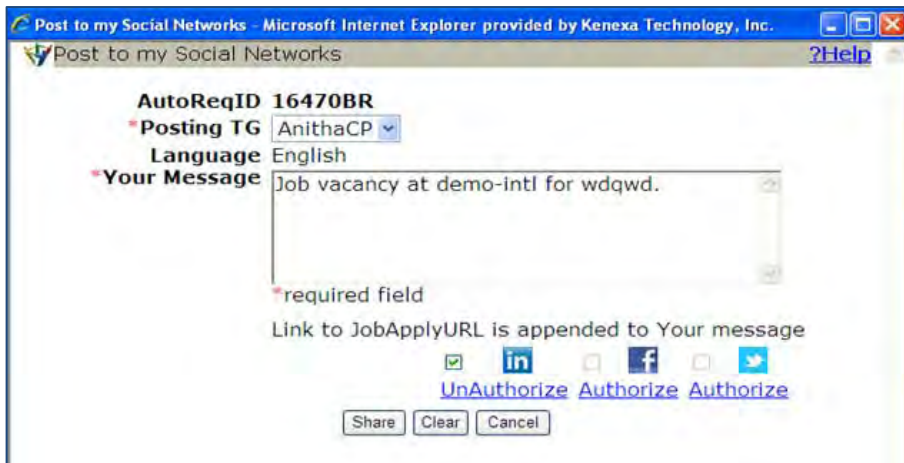
2. Recipient completes the posting message, selects their social media networks for posting, and clicks **Share** to post the job.

Viewing Social Media Information

When a candidate successfully completes a job submissions for the job posted in a social media account, the system captures the candidate's social media information in the Talent Record.

Hovering over **Source** in the candidate's TR displays condensed social media information for users with the new privilege to view it.
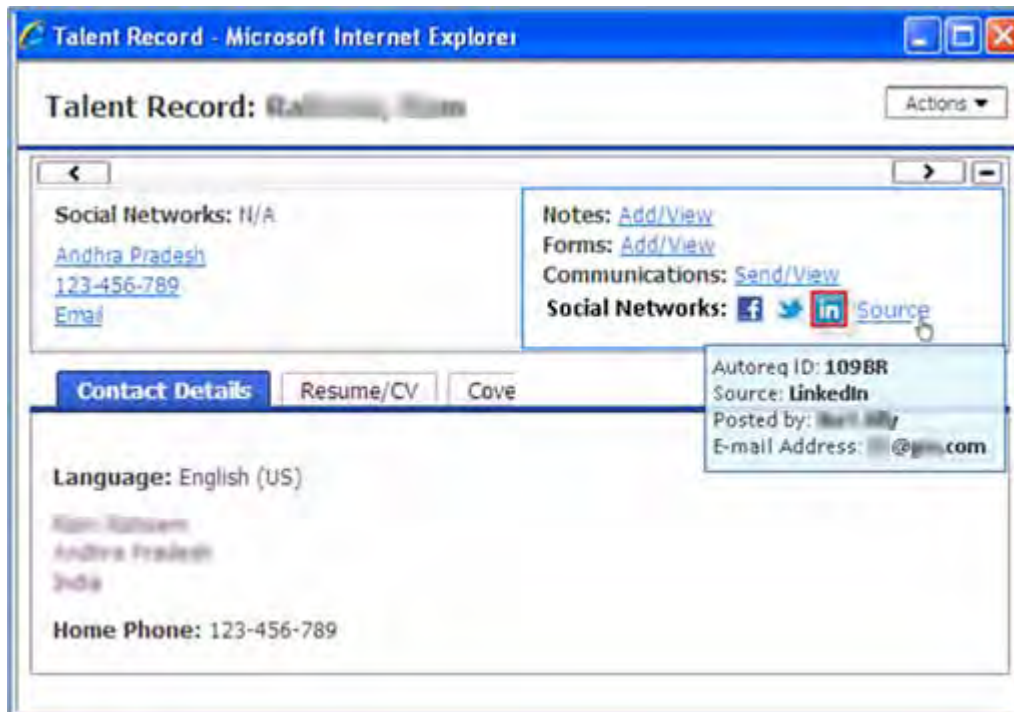
To display detailed social media information, click **Source** in the candidate's TR.
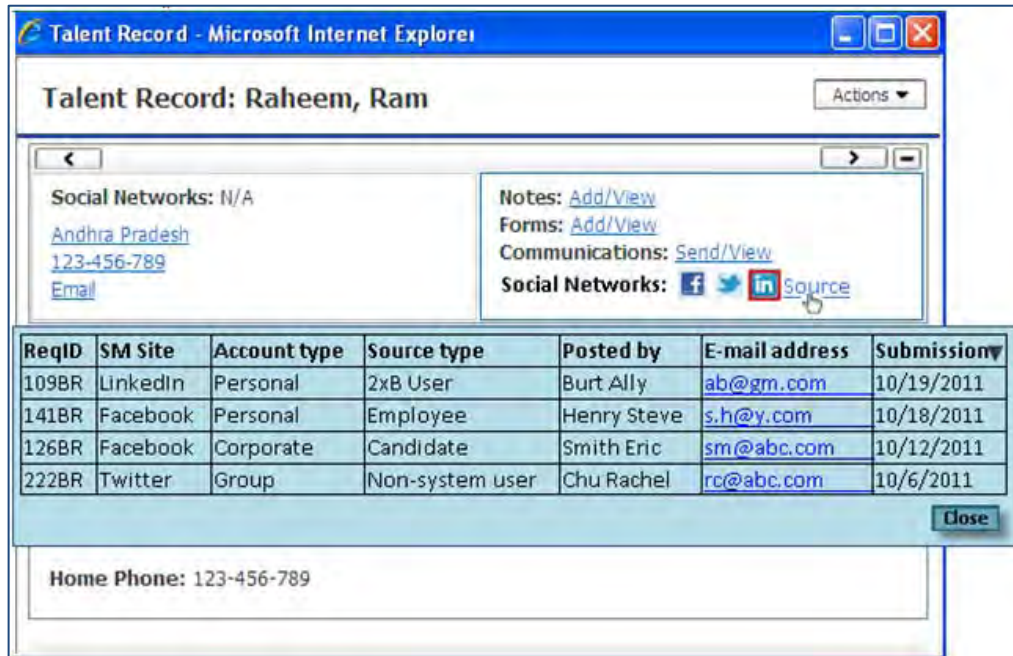
Limitations and Known Issues

Social media source information displays only in the New UI Talent Record. Enhancements to the classic Talent Record are not supported.

Each social referral email can contain a maximum of five reqs. All reqs must be in Open status. Secure reqs are not supported.

How Do Clients Get this Feature?

The following conditions must be met to use this feature:

- Social media integration client setting must be enabled
- Social media integration Talent Gateway setting must be on for TGs where reqs are posted
- Two new user privileges must be enabled: one allows access to social media information and the second allows users to send social referral emails.
- 2xB template administrators must create email templates with the new social referral merge token.

Please contact your Kenexa Support Team or certified Workbench Self-Service user for more information about enabling this feature.

Workbench Self-Service Certified Users

Two new user privileges must be enabled for the social media referral functionality.

Enable Social Networks User Privileges

The two new Reqs 2 privileges are available for this feature.

T**ools > Users > User Types** > **Edit type permissions [for selected user type] > Reqs 2**

- **Social Networks – Source Information**
  This privilege allows users to display the social media source on Talent Records.

- **Social Networks – Send Social Referral Email**
  This privileges allows users to send social referral email.
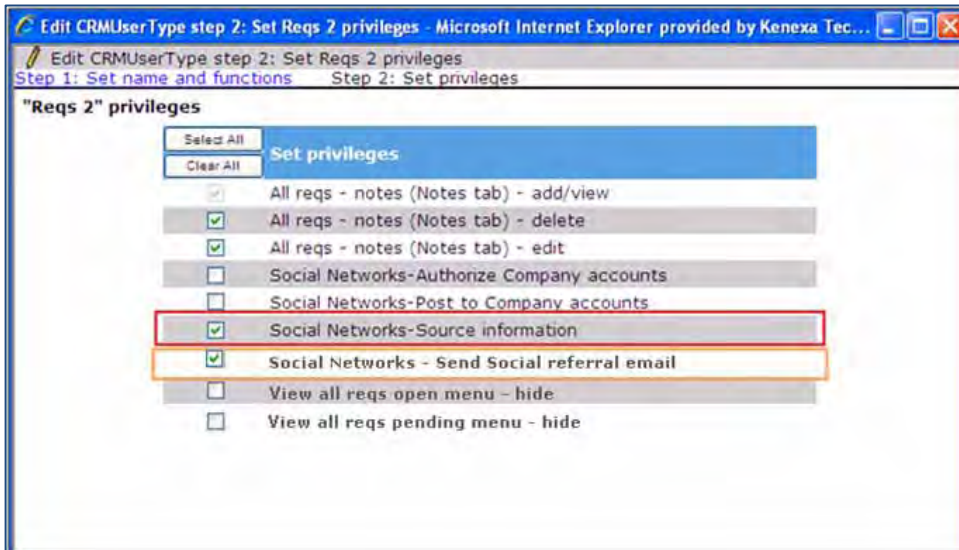
2x BrassRing Admin/Admin+ Users

Template administrators must create email templates and use the new social referral merge token.

1. **Admin > Communications > Add system email template**.
   System email template displays.
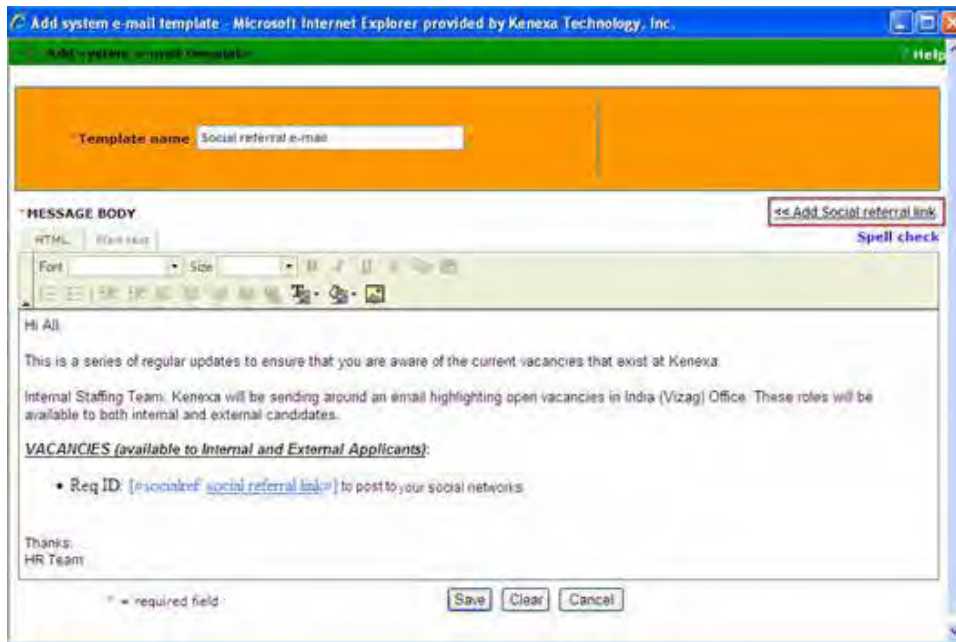
2. Enter in email template text in the text box.
3. Select user text you want to hyperlink and click **Add Social Referral Link**. Selected text becomes active hyperlink.
   If no user text is selected, the text "Social referral Link" is inserted as a hyperlink.
4. Click **Save**.

Kenexa Tasks

The following must be configured for this feature:

- Enable client setting "Enable Social Media integration" (**Admin > Manage clients > Edit client settings**)
- Talent Gateways (TGs) setting "Social media integration – allow post to my social networks," where reqs are posted (**Tools > Talent Gateways > Admin > Edit** [selected TG] >

Social Media – Facebook Jobs Display from TGs

You can now pull your job listing from a Talent Gateway (TG) for display on your Facebook page, complete with filters and job details pages from 2x BrassRing.

Product **RDP587 Rel 13.0**	þ 2x BrassRing þ Talent Gateways	þ Workbench Self-Service þ Social Media	
Visible Changes	þ No – requires specific conditions / configuration for visibility.		
How do I get this feature?	þ Configuration required – contact your Kenexa Support Team for implementation details.		

Feature Description

Your organization can now configure a Facebook widget to pull job listings from a 2xB Talent Gateway for display on your company's FB page. This provides an inexpensive way to post jobs, with a simple interface for passive or active job seekers to see if there is a job opening for them. You can set up keyword search and filter options that people viewing your Facebook page can use to find and apply to interesting jobs.

- You configure a Facebook app for placement on company pages
- Job seekers can search for jobs by four different categories, and view job description without leaving Facebook.
- The application process can be initiated from Facebook , and 2xB will track the candidate source as coming from the Facebook app.

What Job Seekers See

Your 2xB client name is used when displaying long listings (e.g., "Showing 1-25 of 304 Jobs at *Client Name*)," and Job Title, Description, and Date Posted always display.

- The "More" hyperlink displays if the job description is greater than 140 characters long and has been truncated. The complete field displays on the Job Details page.
- "Sorted by" gives viewers the option to sort on:

      Most recent - sorted based on posting date
      Alphabetic (A-Z) – sorted based on Job Title in ascending order

- Clicking the Job Title hyperlink or the "more" hyperlink takes the viewer to the Job Details page, right on Facebook.
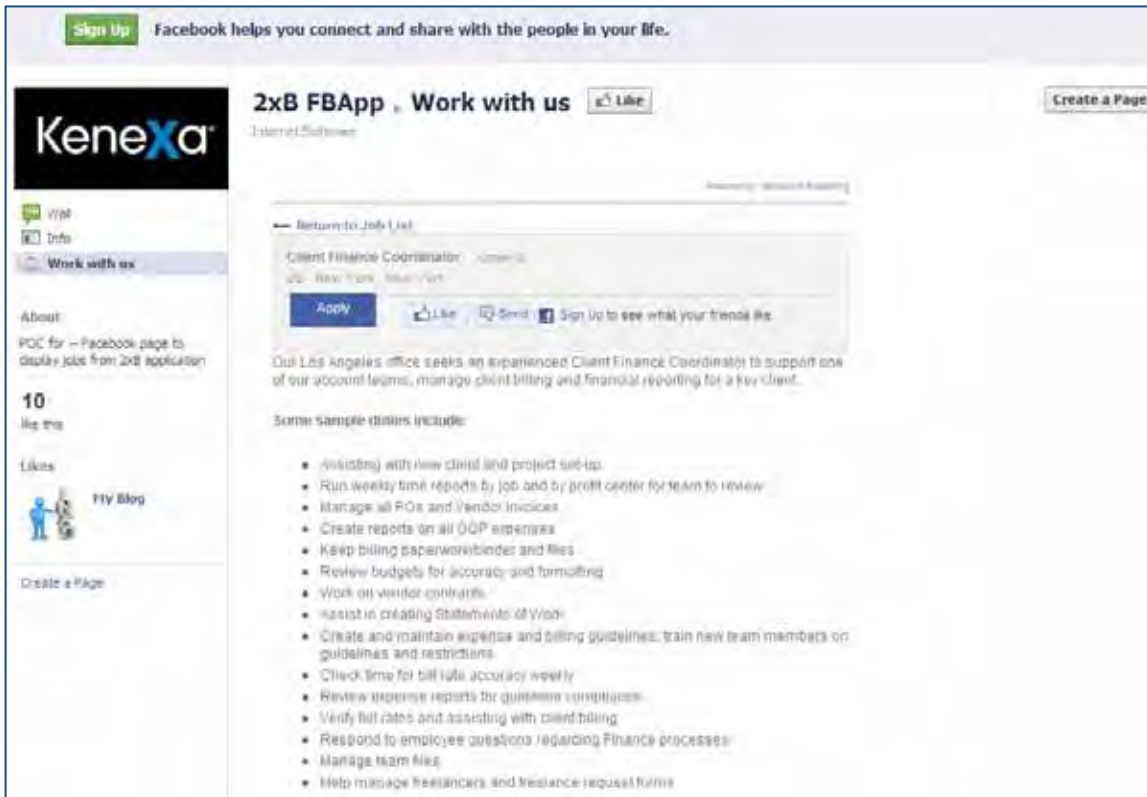
- Clicking **Apply** from the Job Details page opens a pop-up to the destination configured for the job display widget. That is either the TG login page or the TG Job Details page for the selected job.
- "Like" and "Send" buttons are available on the Job details page (they use a Facebook API, and can be localized using that FB API to pass the locale).
- "**Return to Job List**" hyperlink takes the viewer back to the Job listing page.

How Do Clients Get this Feature?

This feature is controlled by a new Workbench setting. Please contact your Kenexa Support Team for more information.

In addition, you must create a Facebook app for the display of the job listings and details. See the next section for general information.

Creating a Facebook App

The following provides an example of how to create a simple app that points to an existing website. This process is subject to change by Facebook, so always see that site for the most accurate and timely information.

Prerequisite – There should be an existing "FB Page" associated with your account. Your account should be associated with a mobile number and activated. This process is not in scope for this document.

1. Click "Developers" found at the bottom of your facebook home page. This takes you to FB's developers page.
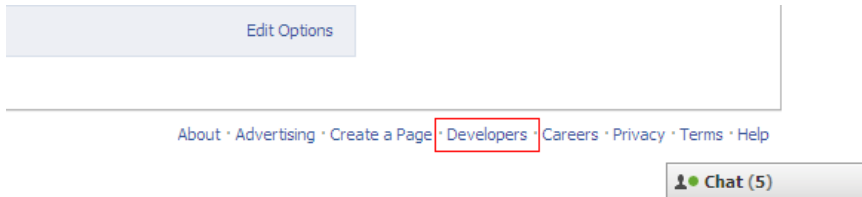
2. Click the "My Apps" link on the FB developers page.
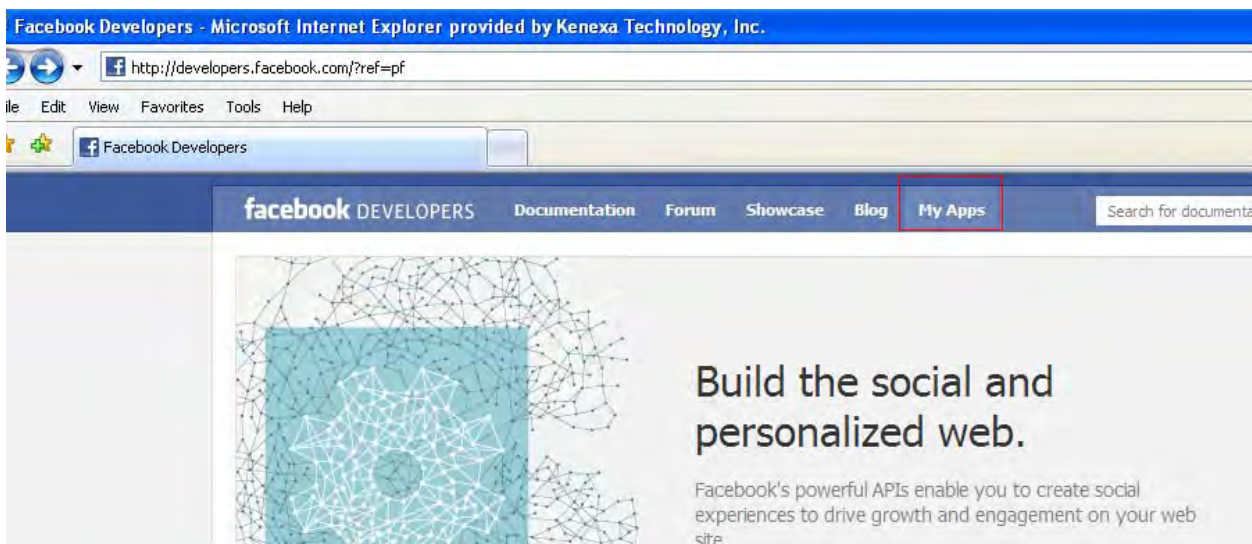
3. Click "+ Set Up New App" button .
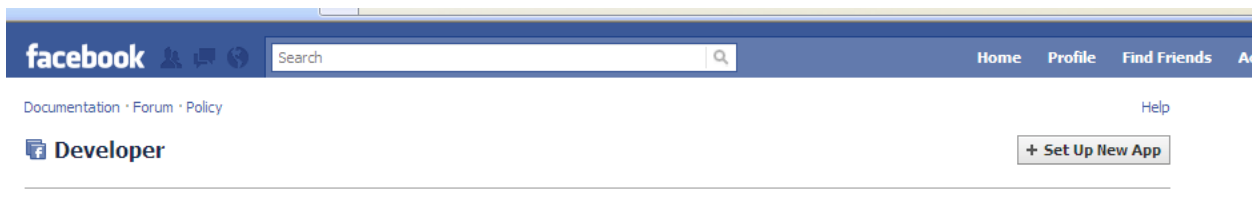
4. Enter the App Name of your choice, read the FB terms, and select the Agree button before clicking "Create App."
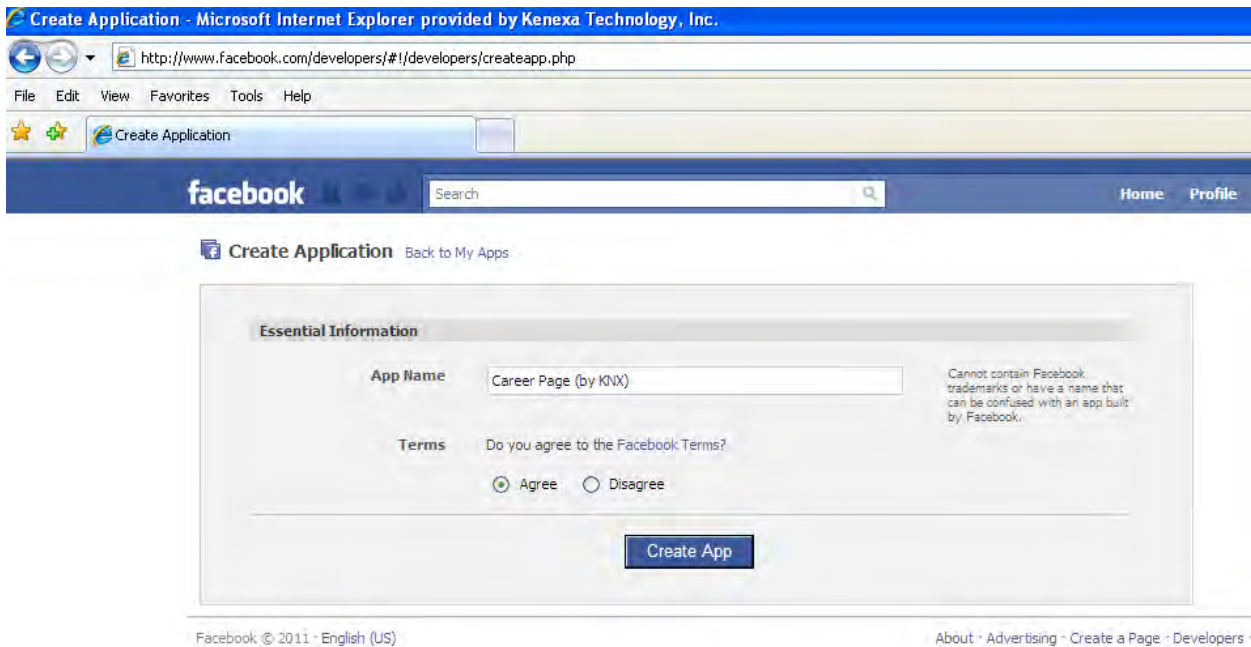
5. Enter the text that appears for security check, and click "Submit."
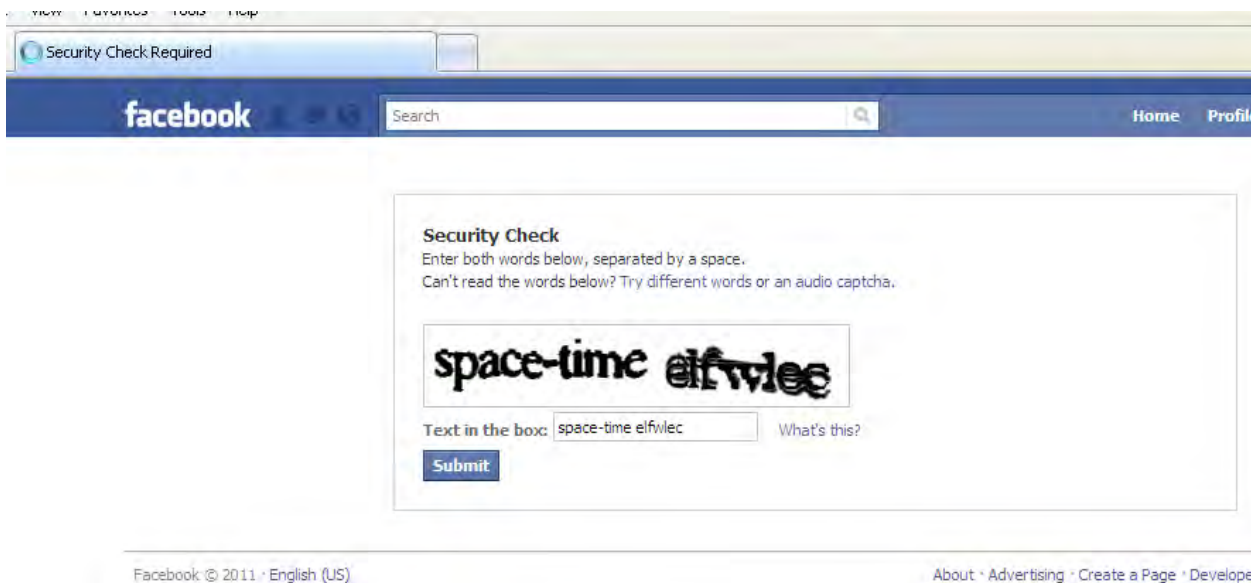
6. Enter the Application Name and click "Save Changes."
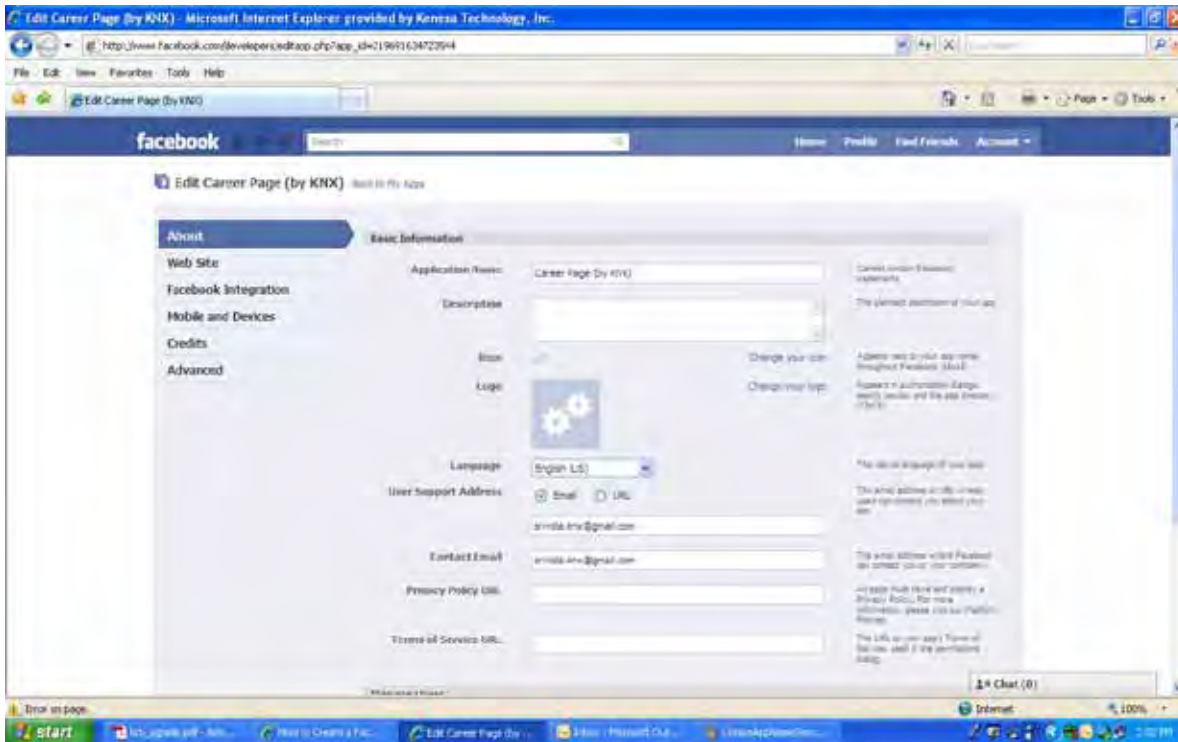
7. FB confirms the creation with App Key and App ID (note this information and provide to Kenexa if desired to eliminate vertical scrollbars in the app). Click "Edit Settings."
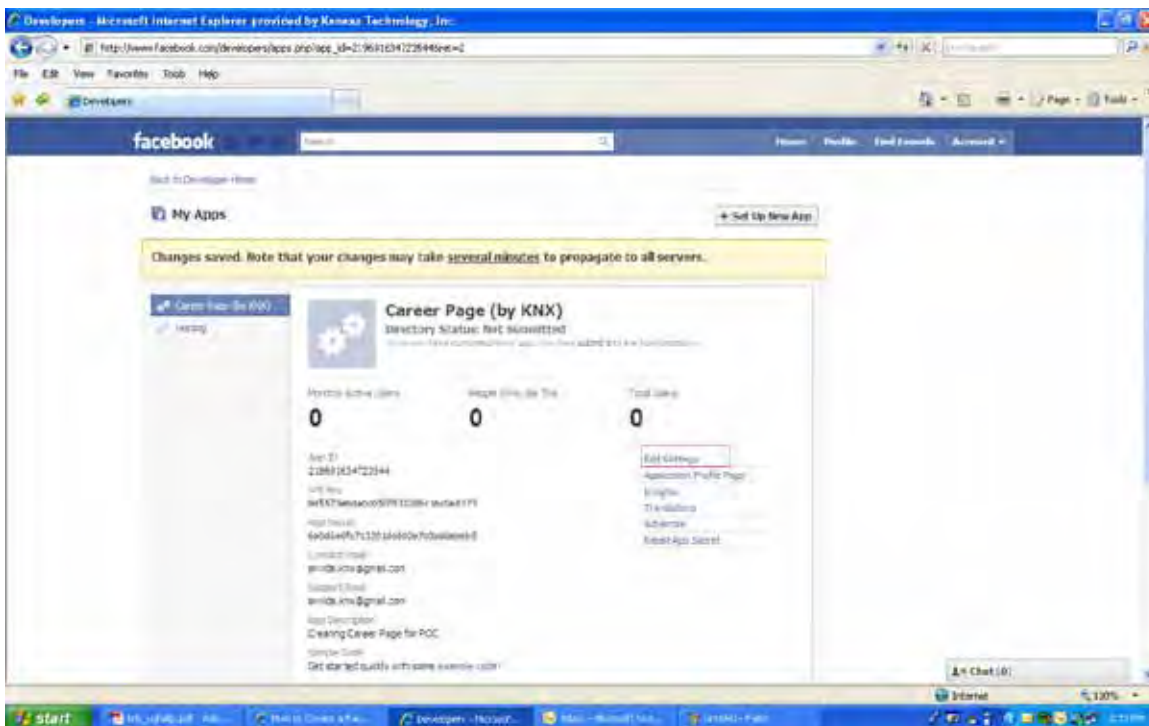
8. Navigate to "Facebook Integration". Enter a name for the Canvas in lowercases only. Then enter the existing website name (obtain from Kenexa) in the Canvas URL field. Enter "Tab Name" value to be displayed as the tab text, and the "Tab URL'" for redirection to the web site upon selection of the tab. Then click "Save Changes."
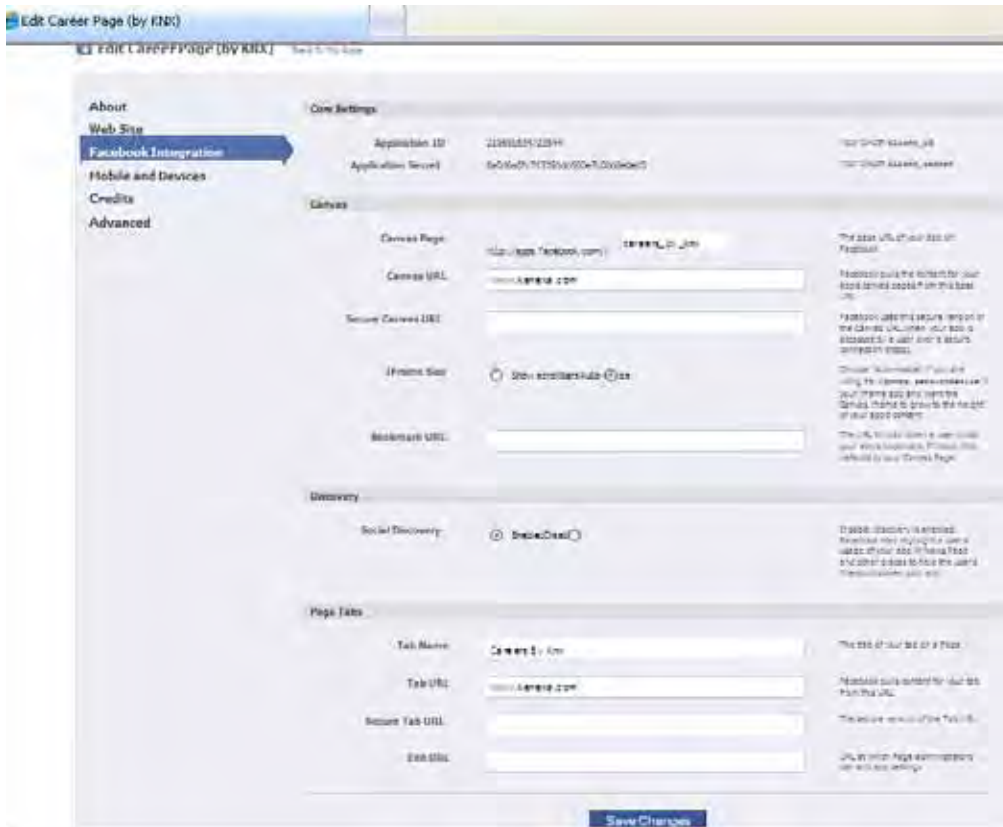
9. Click "Application Profile Page" to view the profile of the application just created.
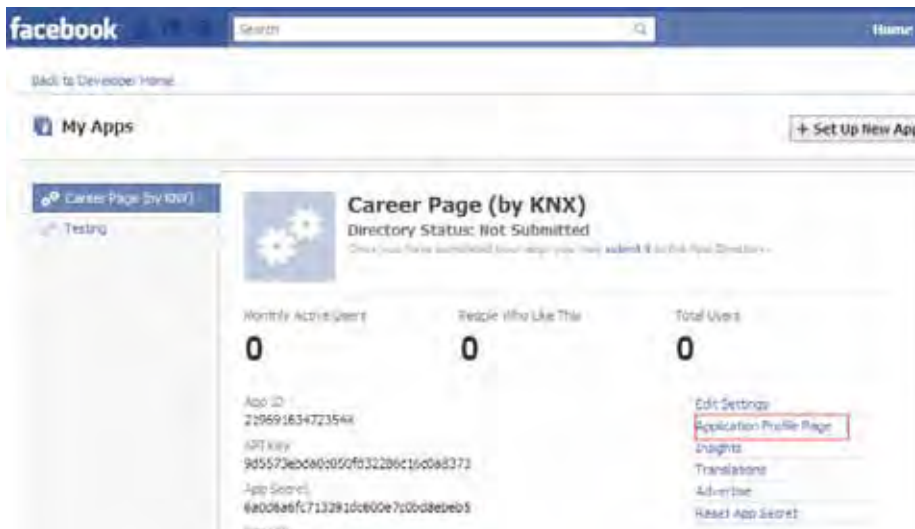
10. Click "Add to my Page" link to add the app to the company page that has been created.
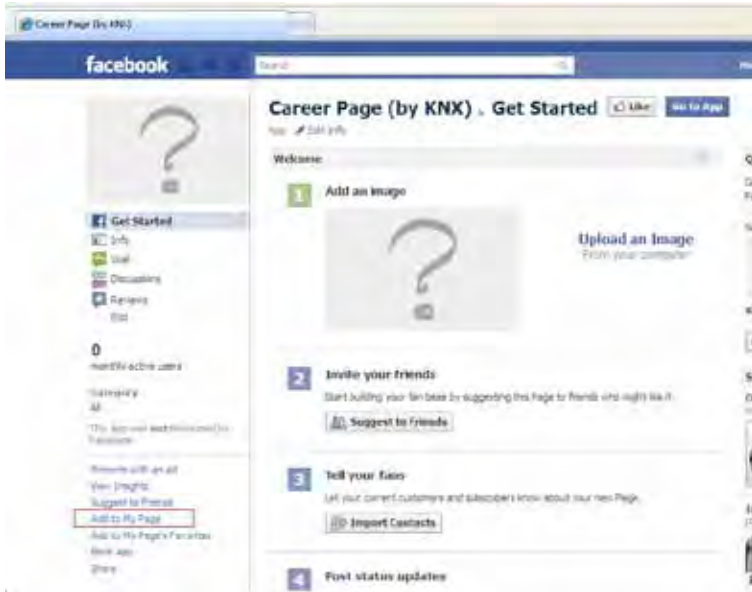
11. Click desired page name and click "Close."
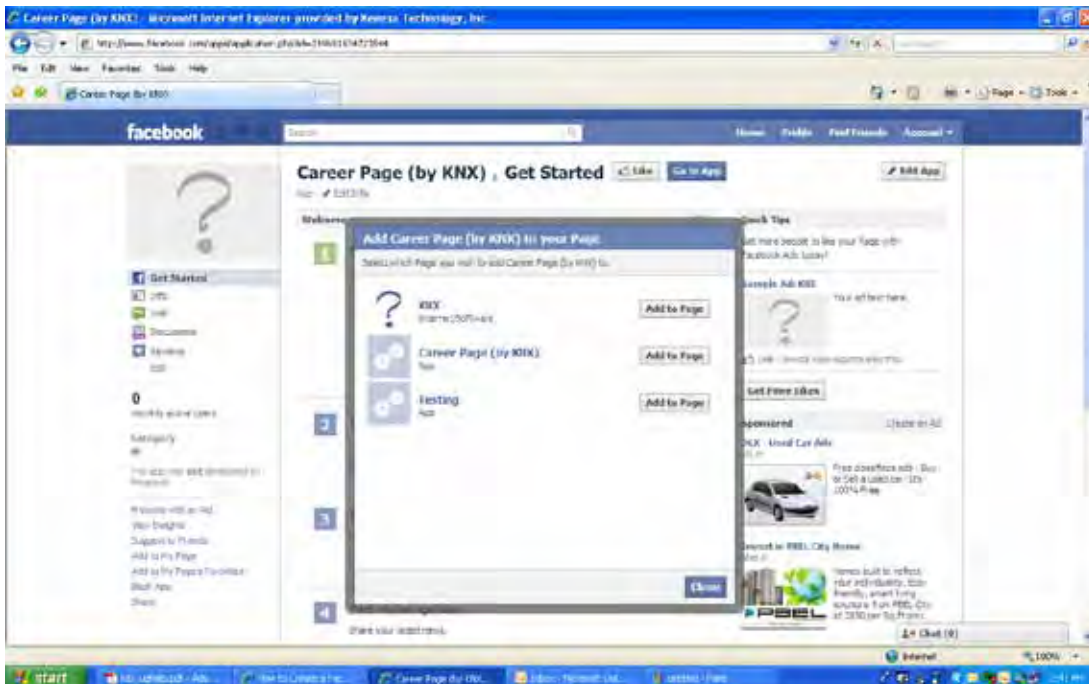
12. The application and the tab that has been created will be visible and the website of your choice will be displayed.

Getting to the Company Page from Your Profile Page

1. Click the "Account" tab from your account and select "Use Facebook as Page" link.
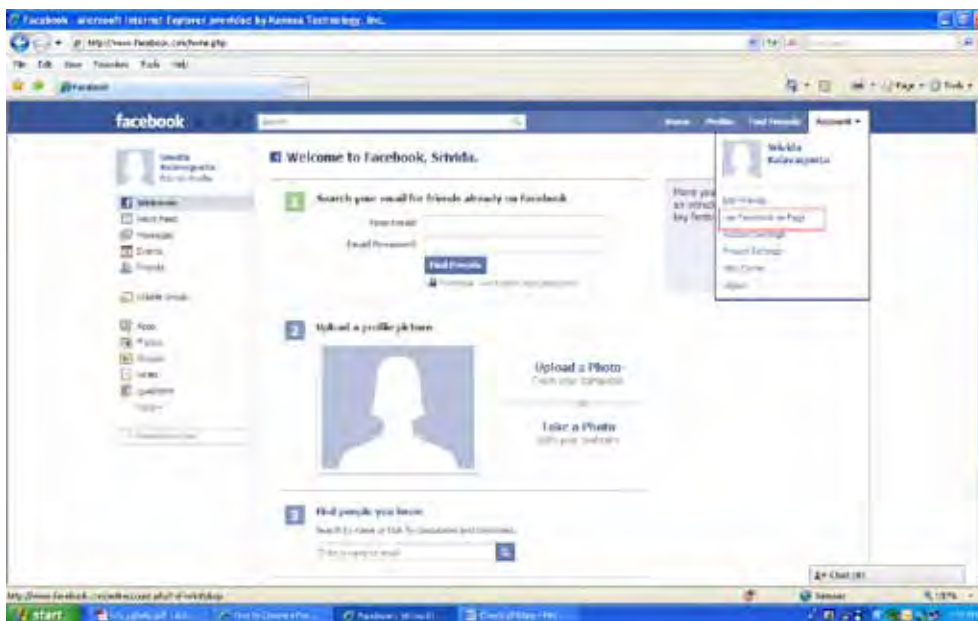
2. Select the page name with which you just associated the app, and click "Cancel." You can now view the company page and the tab that you have just created.
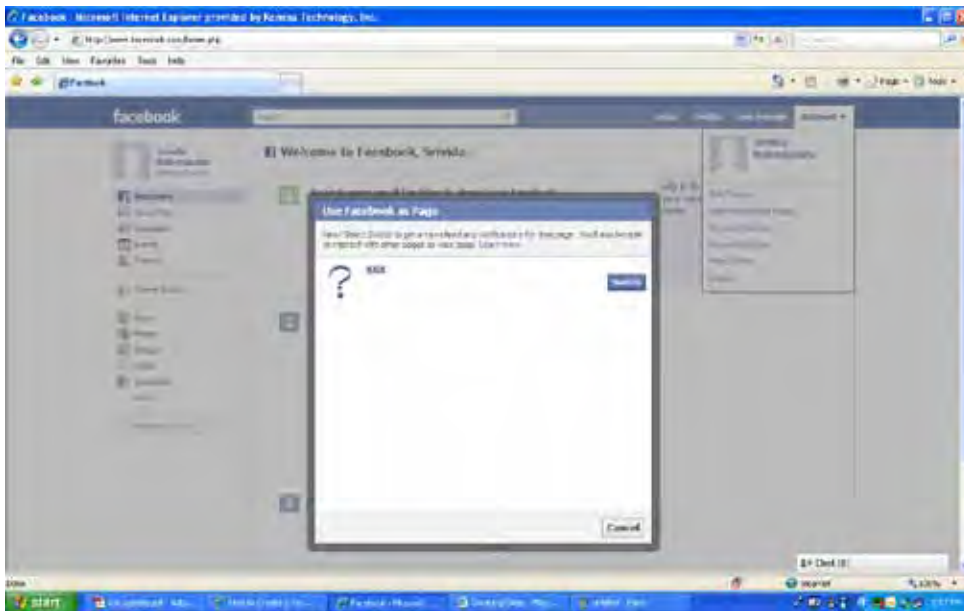
Kenexa Tasks

<mark>Clients must create the Facebook App for their FB page, but the process described is now obsolete. We have not been able to create the App – any new test page that we are creating is currently giving a Facebook error for us. We are still investigating. A new document will be available once the Product Manager has a solution.</mark>

Kenexa staff (Workbench super users and Tech service users) configure the necessary settings required by a client to display jobs on their Facebook page. The URL for the client contains the ClientID and SMSiteID in the query string to it and all other configurations are read from WB.

The FB page will send a random, active user id from the Users table for the client. This is required for calling the TG SearchAPI.

Tools -> Settings -> Social Media configuration

1. Click the new menu item to display the Social media configuration landing page.

2. Click **Administer job widget** for Facebook (the only site for which this is initially offered). The Administer job widget configuration page appears.

3. Select the full Talent Gateway from which to pull jobs. TGs must have Social Media integration selected for Facebook and have the "Allow web service to query the TG" setting enabled.

4. Complete the configuration:

- Select **Yes** for **Enable job widget configuration**.
- Select one external full Talent Gateway (and language, which is shown beside the TG) from which the jobs will be pulled for display in the Facebook widget. The list of TG's includes those with Social Media integration selected for Facebook and that have the "Allow web service to query the TG" setting enabled. Global TGs are not included.
- Select the job widget's default display language.
- Select and order up to three filter fields from the list of all the fields from the selected TG that are searchable and have options – single select, radio, check box, query select. They'll be displayed on the social network site in a single select drop-down list.
- Select and order up to three output fields from the list of all the fields from the selected TG that are outputable. "JobTitle" and "JobDescription" are always displayed. In addition to these Only the first 50 characters are shown in Facebook for each Output field in the Job listing page. The complete fields are shown when displaying the Job details pages.
- Select whether to enable keyword search in the jobs widget. The search icon will work as find button for keyword search. When entering some input in to the Keyword Search, the page will refresh only after clicking the search icon. For the drop-downs, the page will refresh with filtered results once a value has been selected in the drop-down. We may show "Please wait" circle while the page is refreshed.
- Set the number of jobs to be displayed in a page, from 5 to 50. The default is 10.
- Choose whether to redirect candidates who click on the "Apply" button to **Job details page** or **TG login page** (the default).

- Enter the App ID and Secret Key obtained from the client's creation of the app, each can be up top 1000 characters.They are optional, but if included they eliminate the vertical scrollbars on Facebook app page.

5. Click **Save**.
6. On the confirmation pop-up, click the link to view how the page looks on the social network (Facebook) app. Click **Close** when finished.

To launch the job widget after configuration:

Click **Launch job widget** on the **Social Media configuration** page. This shows the stand-alone page/URL that is used by the social network app.

==??Rupesh maintains a document, which this might have to be added to? Siva checking for info.Where should it be documented?==

TG API changes

- TG API will be enhanced to have a new node to accept the number of jobs per page/records per page. The maximum is 50, which is the existing default.
- If nothing is sent to sort on, TG API will sort records based on "most recent" by default.
- Along with the Site ID, we will also pass the locale ID in the input XML. This LocaleID will be used to return the correct jobs when the SitedID corresponds to a TG which is a member of a GTG.
- If the SiteID corresponds to a TG which is not a member of any GTG, the LocaleID will be ignored.

The current XML input looks like this:

```
<InputString>
 <ClientId>11721</ClientId>
        <SiteId>6129</SiteId>
        <PageNumber>1</PageNumber>
   <OutputXMLFormat/>
   <AuthenticationToken/>
   <HotJobs/>
   <JobDescription/>
   <ReturnJobsCount/>
 <ReturnJobDetailQues>
 <QuestionsForORCondition>
     <Groups>
        <Group><![CDATA[comma separated list of questions which support OR]]>
         </Group>
        <Group><![CDATA[comma separated list of questions which support OR]]>
        </Group>
     <Groups>
</QuestionsForORCondition>
   <ProximitySearch>
        <Distance/>
        <Measurement/>
        <Country/>
        <State/>
        <City/>
        <zipCode/>
   </ProximitySearch>
   <JobMatchCriteriaText/>
   <DatePosted>
        <Date/>
   </DatePosted>
   <SelectedSearchLocaleId/>
   <Questions>
```

```
        <Question Sort="Yes/No" Sortorder="ASC/DESC">
            <id/>
            <Value/>
        </Question>
    </Questions>
</InputString>
```

The proposed XML input looks like:

```
<InputString>
        <ClientId>11721</ClientId>
        <SiteId>6129</SiteId>
        <SelectedSearchLocaleId>1033</SelectedSearchLocaleId >
        <NumberOfJobsPerPage>30<<NumberOfJobsPerPage>
        <PageNumber>1</PageNumber>
    <OutputXMLFormat/>
    <AuthenticationToken/>
    <HotJobs/>
    <JobDescription/>
    <ReturnJobsCount/>
  <ReturnJobDetailQues>
  <QuestionsForORCondition>
      <Groups>
         <Group><![CDATA[comma separated list of questions which support OR]]>
          </Group>
         <Group><![CDATA[comma separated list of questions which support OR]]>
         </Group>
     <Groups>
</QuestionsForORCondition>
    <ProximitySearch>
        <Distance/>
        <Measurement/>
        <Country/>
        <State/>
        <City/>
        <zipCode/>
    </ProximitySearch>
    <JobMatchCriteriaText/>
    <DatePosted>
        <Date/>
    </DatePosted>
    <SelectedSearchLocaleId/>
    <Questions>
        <Question Sort="Yes/No" Sortorder="ASC/DESC">
            <id/>
            <Value/>
        </Question>
    </Questions>
```

Like and Send Buttons

The 'Like' & 'Send buttons in Job details page use a Facebook API. They can be localized using FB API by passing the locale.

Ex: For Tamil language

```html
<html>

<head>

</head>

<body>

<iframe
src="http://www.facebook.com/plugins/like.php?href=http%3A%2F%2FURL&amp;locale=ta_IN&amp;layout=butt
on_count&amp;show_faces=true&amp;width=450&amp;action=like&amp;colorscheme=light&amp;height=80"
scrolling="no" frameborder="0" style="border:none; overflow:hidden; width:450px; height:80px;"
allowTransparency="true"></iframe>

</body>

</html>
```

Social Media – Posting to Multiple Accounts and Groups

This feature enables client to authorize and post jobs to multiple company, personal, and group accounts of social media sites (Facebook, LinkedIn, and Twitter only). Feature also allows clients to define a workflow by restricting job posting privileges within their organizations.

Product **RDP086 Rel 13.0**	þ 2x BrassRing þ Workbench Self-Service	þ Social Media
Visible Changes	þ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	þ Configuration required – contact your Kenexa Support Team for implementation details.	

Feature Description

This feature enables client to authorize and post jobs to multiple company, personal, and group accounts of social media sites (Facebook, LinkedIn, and Twitter only). Administrators can authorize integration with up to 25 accounts of social media sites; company and personal respectively. There are no restrictions on the number of social media group accounts. Two new user privileges separately define who can authorize integration to social media sites and who can post jobs to those sites.

Posting to Multiple Sites

The following example steps through the process of posting to multiple social media accounts and reflects a typical 2xB user experience if you are authorized to post jobs to company, personal, and group social media accounts.

1. In an open Req folder, click **Post to my Social Networks**.
   The Post to my Social Networks dialog box displays:

   - Your authorized accounts are categorized into personal, company, and groups. The word **Add** in each category indicates you can add social media accounts in that category.

   - A hyperlinked social media profile image represents each individual social media site.

   - Each category has arrows for scrolling and radio buttons indicating scroll position in the category's scroll sequence.

   - Each category contains social media icons representing social media accounts a 2xB user is authorized to add. Clicking the icon adds the social media account to the category.

   - The social media site account profile image represents your personal, company, or group accounts. If no image is present, the system displays a default image.

   - Hovering over the profile image displays a tool-tip with the user name (First and Last), company, or group identifier.
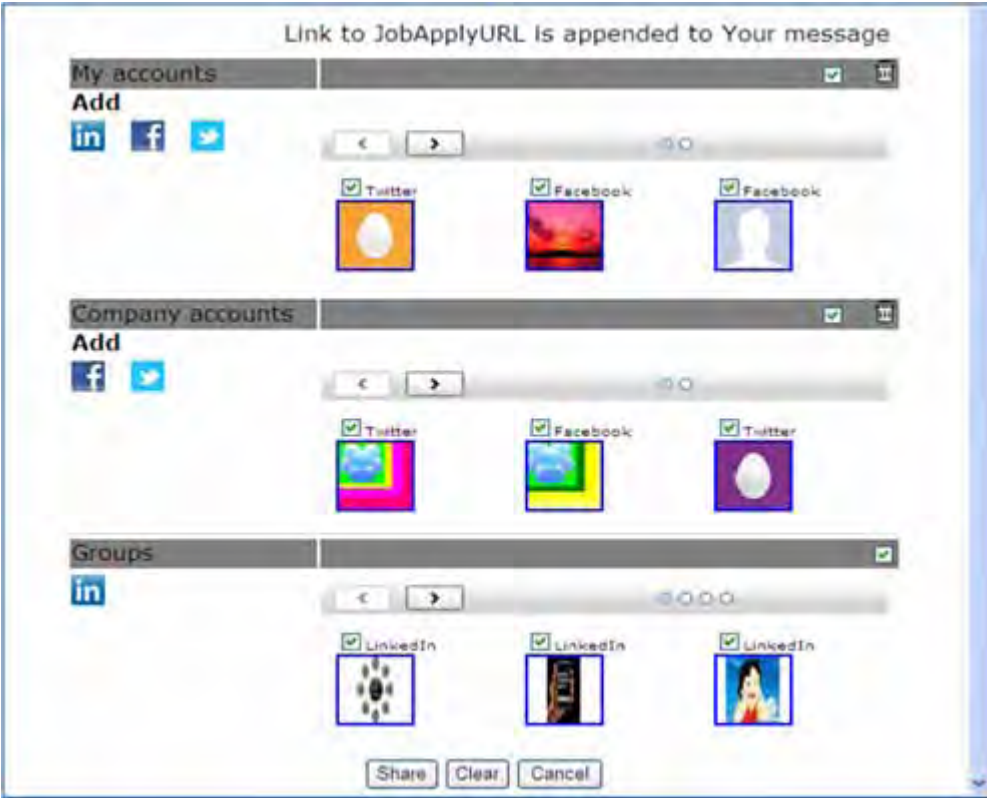
2. Ensure that the accounts to which you want to post the job are selected.

- Select/de-select *all* social media accounts in a category by checking/unchecking them in the Accounts category section bar. The checkbox is selected by default (active) .When checked, *all* social media sites in that category are checked (enabled); when unchecked, all sites are disabled

- Select/de-select individual social media accounts or groups by checking/unchecking the checkbox above their profile images. All accounts in an enabled site are selected (checked) by default.

> Be aware when posting to Twitter accounts that your posting can be no longer than 140 characters. If you exceed 140 characters, the job cannot be posted .

3. Unauthorize any social media accounts, if desired:

- Uncheck checkbox in Accounts category section bar.

- Check checkbox of social media accounts to un-authorize.

- Click the trash can icon.

4. Click **Share.**
   A confirmation dialog box displays:
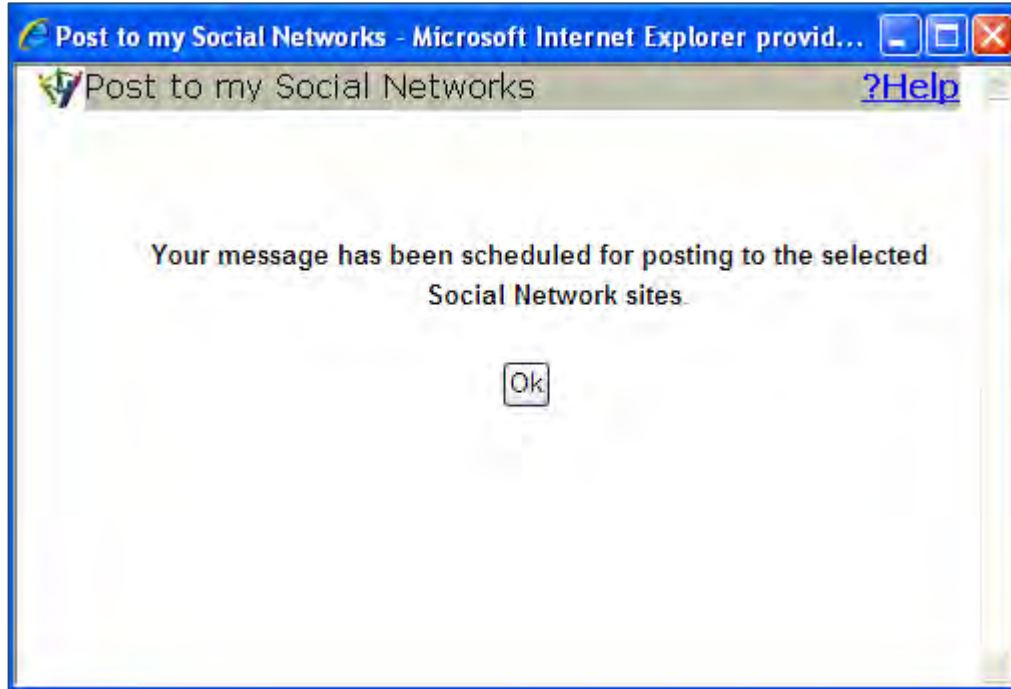
5. Click **Ok**.

Best Practice Recommendations

This feature supports integration of up to 25 company accounts and 25 personal accounts of social media sites. Best practice recommends a maximum of six for each category for maximum performance.

Limitations and Known Issues

At this time, this feature is not available for LinkedIn company accounts nor Facebook and Twitter Groups.

How Do Clients Get this Feature?

Social Media Integration must be enabled before configuring new client settings.

This feature is controlled by:

*   New client setting in Workbench (set by your Kenexa Support Team)
*   Two new user privileges determine a user's authorization and job posting capabilities. (can be set in Workbench Self-Service).

Please contact your Kenexa Support Team for more information about enabling this feature.

Workbench Self-Service Certified Users

User privileges determine a user's job posting capabilities. Depending on the social media job posting workflow, some 2xB users may have one or both of these user privileges.

The two user privileges are Req 2 user privileges controlling whether a particular job can be posted to a social media site and who can post that authorized position.

In WB:

1. Tools > Users > User Types.
    The User Type screen displays.

2. Click the **Edit** icon for a particular user.
   The Set Name and Function dialog box displays.
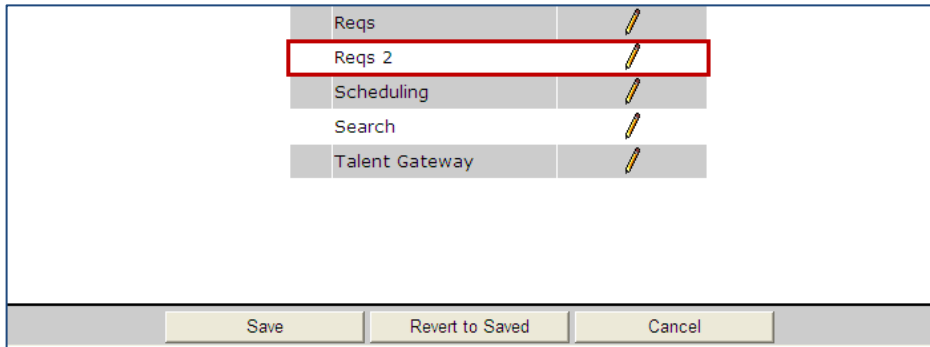
3. Click the **Edit** icon for Reqs 2.
   The Edit User screen displays.
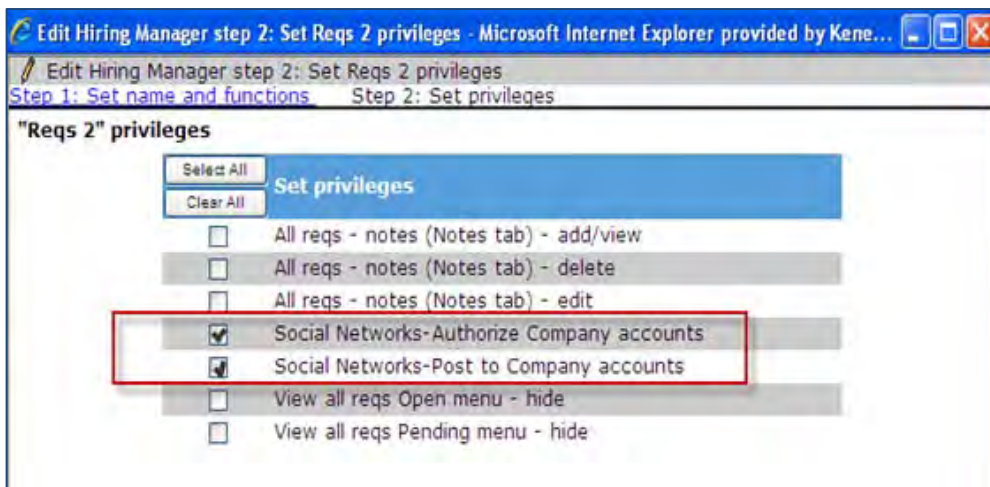
4. Select the checkbox next to **Social Networks – Authorize Company accounts** and/or **Social Networks – Post to Company accounts**.
5. Click **Done**.
6. Click **Save**.

Kenexa Tasks

This Social Media feature requires three new client settings.

Workbench

This feature requires three new Enable Social Media Integration client settings and two new user privilege settings.

The three social media integration client settings enable:

- Maximum allowable company social media accounts
- Maximum allowable personal recruiter social media account
- Access to Group posting integration

In WB:

1. **Admin > Manage Clients > Edit Client Settings**.
   The Edit Client settings dialog box displays.
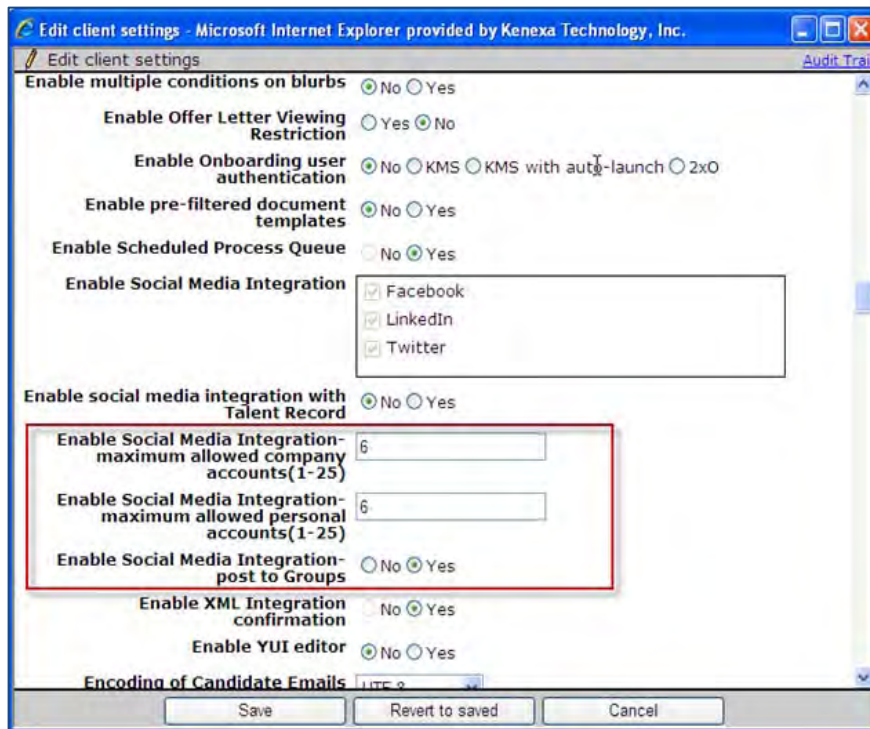
2. In the three **Enable Social Media Integration** selections, enter:

   - Number of allowable social media company accounts (valid range 1 to 25).

   - Number of allowable social media personal recruiter accounts (valid range 1 to 25).

   - Select the **Yes** radio button to enable social media integration job posting to groups.
     Selecting Yes allows users to post to their SM groups if they have posting privileges from the specified SM group.

Social Media – Restrict Posting Option on Talent Gateways

This Talent Gateway (TG) feature offers clients an additional choice when configuring TG social network features. Clients now have the option to restrict the display of the Post to My Social Network(s) button on their TG. The Post to My Social Network(s) button allows candidates to forward job postings to their social networks.

Product RDP583 Rel 13.0	☑ 2x BrassRing ☑ Workbench Self-Service	☑ Talent Gateways
Visible Changes	☑ Yes – details in *Visible Changes* document sent for each release build.	
How do I get this feature?	☑ Configuration required – contact your Kenexa Support Team for implementation details.	

Feature Description

This new Talent Gateway (TG) feature offers clients an additional choice when using social media functionality. Clients can now choose to restrict the Post to My Social Network button on the TG job details page.
Before release 13.0, turning on the TG social media setting enabled two different functionalities simultaneously. The first functionality allowed candidates to use their social network to apply to positions, and the second displayed the Post to My Social Network button. These functionalities are no longer associated under the same setting.

Currently, enabling the social media functionality on a TG only allows candidates to use their social network media profiles to apply to positions.

Candidate Experience

The candidate experience outlined in the following screenshots shows the Post to My Social Network(s) disabled and then enabled.

When the TG Post to My Social Network(s) feature is not enabled, the Post to My Social Network(s) button does not display during the candidate's application process.

When the TG Post to My Social Network(s) feature is enabled, the Post to My Social Network(s) button displays during the candidate's application process as shown in the following screenshot.

Limitations and Known Issues

This new feature is only available for Full Gateways.

How do Clients get this Feature?

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

Workbench Self-Service Certified Users

Use the following procedure to enable this new Talent Gateway feature.

In WB:

1. **Tools > Talent Gateway > Admin.**
   The Talent Gateway Administration Page displays.
2. Select a Full Gateway and click the **edit** icon.
   The Talent Gateway details page displays.
3. Select the **Yes** radio button next to the new setting, **Allow Post to My Social Networks**.

4. Click **Save**.
   The new TG setting is saved.

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 as of the 13.0 release in December 2011 is included in this document – "*Kenexa 2x BrassRing™ Supported Browsers*" PDF file.

Language Support

As of Release 13.0, 2x BrassRing has added support for:

Welsh language Talent Gateways. RDP522

Talent Gateway/Agency Manager resume extraction for Simplified Chinese and Traditional Chinese RDP563

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 12.5 release in July 2011 is included in this document – "*Kenexa 2x BrassRing Supported Languages*" PDF file.

Talent Gateways – Candidate Portal Expansion

Candidate portal functionality now includes the ability to share document packets with 2xB candidates who do not have Talent Gateway (TG) profiles.

|		
Product **LDP062 Rel 13**	þ 2x BrassRing þ Workbench Self-Service	þ Talent Gateways
Visible Changes	þ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	þ Configuration required – contact your Kenexa Support Team for implementation details.	

Feature Description

This feature is designed for candidates in the 2xB system who do not have a TG profile, such as candidates from Agency Manager (AM) or Employee Referral Gateway (ERG). Previously, 2xB users could not share document packets with candidates who did not have TG profiles.

When configured, this feature allows 2xB users to create candidate TG profiles and post document packets to those profiles. Using a customized TG login page on the candidate portal, 2xB users can now pre-define candidate username and password profile fields, instruct candidates to use these profile fields as logins, and direct candidates to the TG profile where the document packets reside.

> Note: Candidates without TG profiles can also be entered into the 2xB system via: Add Candidate, XML import, Agency Manager, and Employee Referral.

A typical use case might be this example. A recruiter views a resume in a requisition folder for a candidate who does not have a TG profile but is a fit for a position. With this feature enabled:

- Kenexa Support Team configures client settings to use the email profile field as the *username* and the home phone as the *password*. The available profile fields are: username (email address, first name, and last name) and password: (home phone, work phone, other phone, zip code).
- The 2xB user uses the **Post to Portal** action to post a document packet detailing the available position.
- The system searches the candidate's resume and then checks to see if this candidate has a TG profile. If no TG profile is found, the system then scans the resume to see if it contains the username and password profile fields configured in the client settings (email and home phone in our example). If the system locates these fields, it creates the TG profile for this candidate.
- When the TG profile is created, the Talent Record (TR) displays for the candidate represented by username.
- The 2xB user sends an email to the candidate.
- Candidate clicks the portal link in email, logs into TG using the configured profile fields (email and home phone) as username and password as instructed on the TG login page (customized text) and views the document packet.

2xB User Experience

The following example is a visual representation of the workflow example outlined above.

1. **Candidate Talent Record > Attachments tab > Posted on Portal**. 2xB user clicks the Posted to Portal icon on the attachments tab in 2xB and posts the document packet. The system creates the TG profile.

2. The recruiter uses Send communication action to send the candidate an email with the link to the TG profile on the candidate portal.
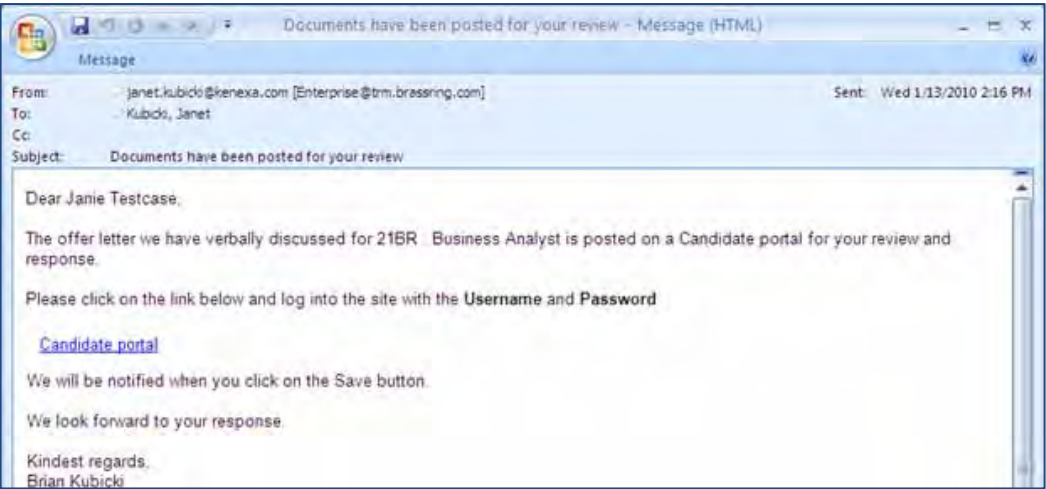
3. Candidate clicks the link.
   TG login page displays with customized text instructing user to use their email and home phone (numbers only) as their username and password.

4. Candidate completes Username and Password fields following login instructions. Usernames are case-Insensitive..
5. Candidate clicks **Continue**.
   The Change Password screen displays.

6. Candidate changes password and clicks **Submit**.
Candidate portal page displays and candidate can select and view the document.

7. Candidate clicks **Log out** after reviewing document.

Best Practice Recommendations

Configuration relies on using specific resume profile fields as usernames and passwords for non-TG profile candidates. Because of this reliance, it is recommended that 2xB users make the following profile fields required when transferring candidates into 2xB: home phone, work phone, other phone, zip code, email address, first name, and last name.

How Do Clients Get this Feature?

This feature is controlled by two new client settings, as well as existing user type privileges and a TG text customization setting. Please contact your Kenexa Support Team or certified Workbench Self-Service user for more information about enabling this feature.

Workbench Self-Service Certified Users

To support this functionality, 2xB users must enable two separate user privileges and edit the TG text customization page.

The first user privilege allows the user to post to the candidate portal and the second user privilege allows the 2xB user to post document templates to the non TG applicants candidate profile. The TG text customization provides the login instructions for the candidate login.

User Privilege to Post to Candidate Portals

To configure user privileges for users posting to Candidate Portals:

1. **Tools > Users > User Types**.
2. Click **Edit** icon for selected user.
   The Set Name and functions dialog box displays.
3. Click the **Edit** icon for Candidate Actions 2
4. Select the checkbox next to **Attachments – post to Candidate portal**.
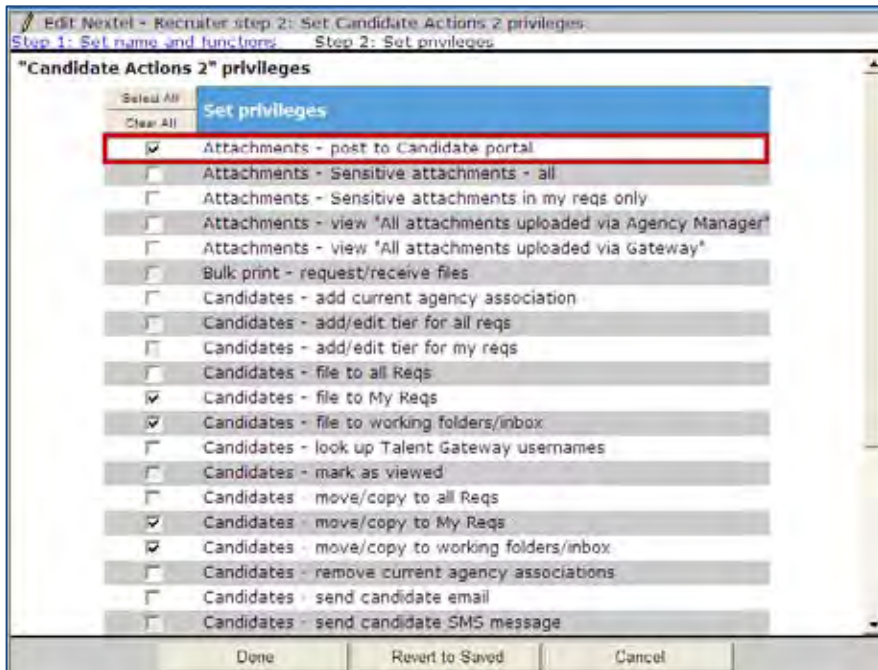
5. Click **Done**.
6. Click **Save**.

User Privilege to Post Document Packet Templates

1. **Tools > Users > User Types**.
2. Click **Edit** icon for selected user.
   The Set Name and functions dialog box displays.
3. Click the **Edit** icon for Communications.
4. Select all desired Document packet template user privileges.
5. Click **Done**.
6. Click **Save**.

Talent Gateway Text Customization

1. **Tools > Talent Gateways**.
2. Select a TG and click the **Edit** icon.
   The customization screen displays.
3. Click the **Candidate Portal** tab.

4. Enter customized text in the **non TG applicants Intro** text box. The customized text becomes the customized TG login instructions that display when the candidate logs in for the first time.
   For example, if the client settings define the email address as the username and the home phone as the password, the customized text would read, *"To be able to login to your account, please enter your email address for User name and your Home phone number (Numbers only) for your Password."*
5. Select the checkbox next to **Default site for Candidate Portal access for non-logged in profiles with matching locale.**

6. Click **Save**.

Kenexa Tasks

The two client settings support the username and password function used for non-TG profile candidates.

Workbench

For full feature functionality, both client settings for username and password must be enabled.

1. **Admin > Manage Clients**.
2. Select **Yes** radio button next to **Candidate Portal**.
3. Click the **Edit** icon.
4. Select a TG password field from the drop-down list box next to **Candidate Portal – Password for Non TG applicants**.

5. Select a TG username field from the drop-down list box next to **Candidate Portal – Username for Non TG applicants**.

6. Click **Save**.

Talent Gateways – Disclaimer Statement

This feature allows the configuration of a Disclaimer Statement when a candidate uploads documents when completing an application in a Full Talent Gateway (TG) or when completing a Gateway Questionnaire (GQ).

Product Release: 13.0	☑ Talent Gateways
Visible Changes	☑ No – requires specific conditions / configuration for visibility.
How do I get this feature? RDP479	☑ Configuration required – contact your Kenexa Support Team for implementation details.

Feature Description

This feature configures a Disclaimer Statement on a Talent Gateway (TG) to display when a candidate uploads documents or completes an application in a Full TG or when a candidate completes a Gateway Questionnaire (GQ). If a candidate clicks the Agree button on the Disclaimer Statement screen, the upload process continues. If a candidate clicks the Disagree button on the Disclaimer Statement screen, the attachment is not uploaded but the candidate is allowed to continue the application process.

Candidate Experience

On the Talent Gateway, when the Disclaimer Statement attribute is configured, it displays in the TG and in the GQ workflows.

- In a Full TG, a candidate browses to select a file to upload and clicks **Upload**. The following is a screenshot of a TG Submit Attachment screen.
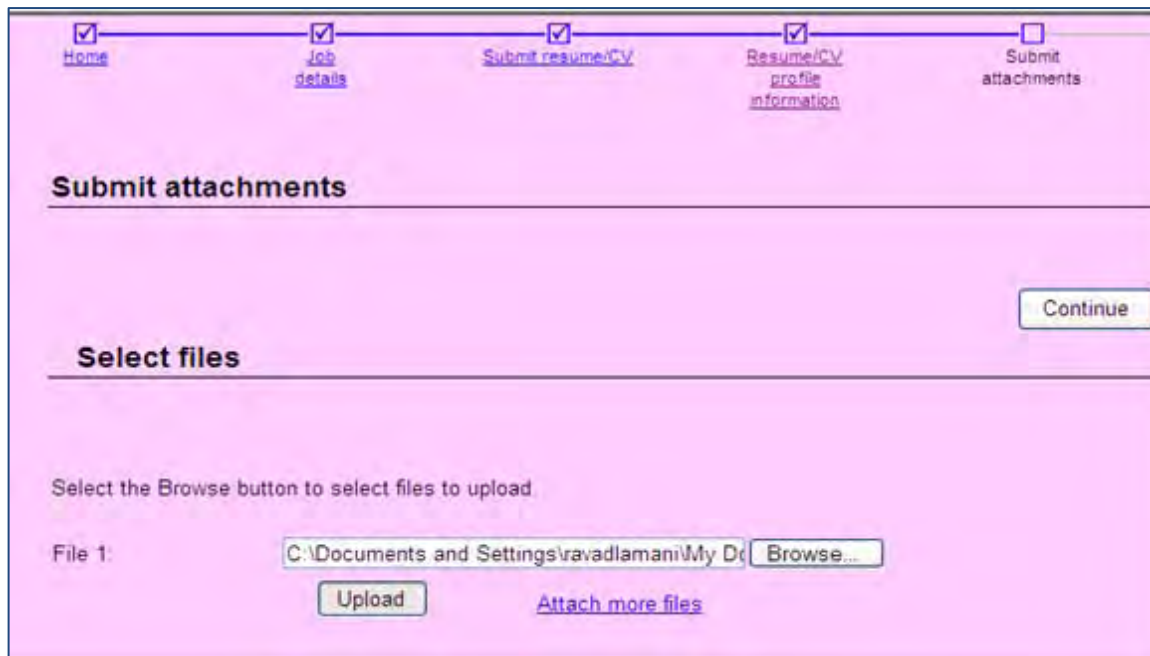
When the candidate clicks **Upload**, the Disclaimer Statement displays:

TERMS OF USE

By using this website, you acknowledge that you have read and agree to these terms. Department staff may revise these terms periodically. If you continue to use our website after we post changes to these terms, it will mean that you accept such changes. If at any time you do not wish to accept the Terms, you may choose not use the website.

1. This Environmental Review and project planning website was developed and intended for the purpose of screening projects for potential impacts on resources of special concern. By indicating your agreement to the terms of use for this website, you warrant that you will not use this web site for any other purpose.
2. Unauthorized attempts to upload information or change information on this web site are strictly prohibited and may be punishable under the Computer Fraud and Abuse Act of 1986 and/or the National Information Infrastructure Protection Act.
3. The Department reserves the right at any time, without notice, to enhance, modify, alter, or suspend the web site and to terminate or restrict your access to the web site.
4. This Environmental Review is based on the project study area that was entered. The review must be redone if the project study area, location, or the type of project changes. If additional information becomes available, this review may need to be reconsidered.
5. A signed and initialed copy of the Review Receipt indicates the receipt has been read and all terms therein agreed to by the signer of the Review Receipt.

This website maintains a record of each environmental review search result as well as all contact information. This information is maintained for internal tracking purposes. Information collected in this application will not be shared outside of the purposes of the Department.

If the Review Receipt and supporting material are not mailed to the Department or other appropriate agencies within six (6) months of the Project Review Receipt date, the receipt is considered to be null and void, and a new review must be initiated.

YOU MUST SELECT "AGREE" IN ORDER TO UPLOAD THE ATTACHMENT. SELECTION OF "DISAGREE" WILL NOT UPLOAD THE ATTACHMENT.

Agree   Disagree

When the candidate clicks **Agree**, the file is uploaded and the job application process continues. If the candidate clicks **Disagree**, the file is not uploaded but the application process continues.

- In the GQ workflow, a candidate browses to select a file to upload and clicks **Upload**. The following is a screenshot of a GQ Attachments screen.

When the candidate clicks **Upload**, the Disclaimer Statement displays:

When the candidate clicks **Agree**, the file is uploaded and the job application process continues. If the candidate clicks **Disagree**, the file is not uploaded but the application process continues.

Best Practices Recommendations

Include a customized Disclaimer Statement to your Full TG to allow candidates to upload attachments during the job application process.

How Do Clients Get this Feature?

The Disclaimer Statement is configured in Workbench and displays on the client's Full Gateways. Please contact your Kenexa Support Team or Certified Workbench User for more information.

Workbench Self-Service Certified Users

When a Disclaimer Statement is configured, the Agree and Disagree buttons display automatically. They do not require configuration. If a user chooses to accept the default setting (empty text field) for the Disclaimer Statement, the Disclaimer pop-up does not display.

To configure and customize the Disclaimer Statement text:

1. In WB Select **Tools -> Talent Gateways ->Text Customization**.
2. Select a Full TG using the radio button and Select **Actions >Edit** or click the Edit Icon.
3. Click the **Attachments tab**. The Attachments page displays. The default display is an empty text field.
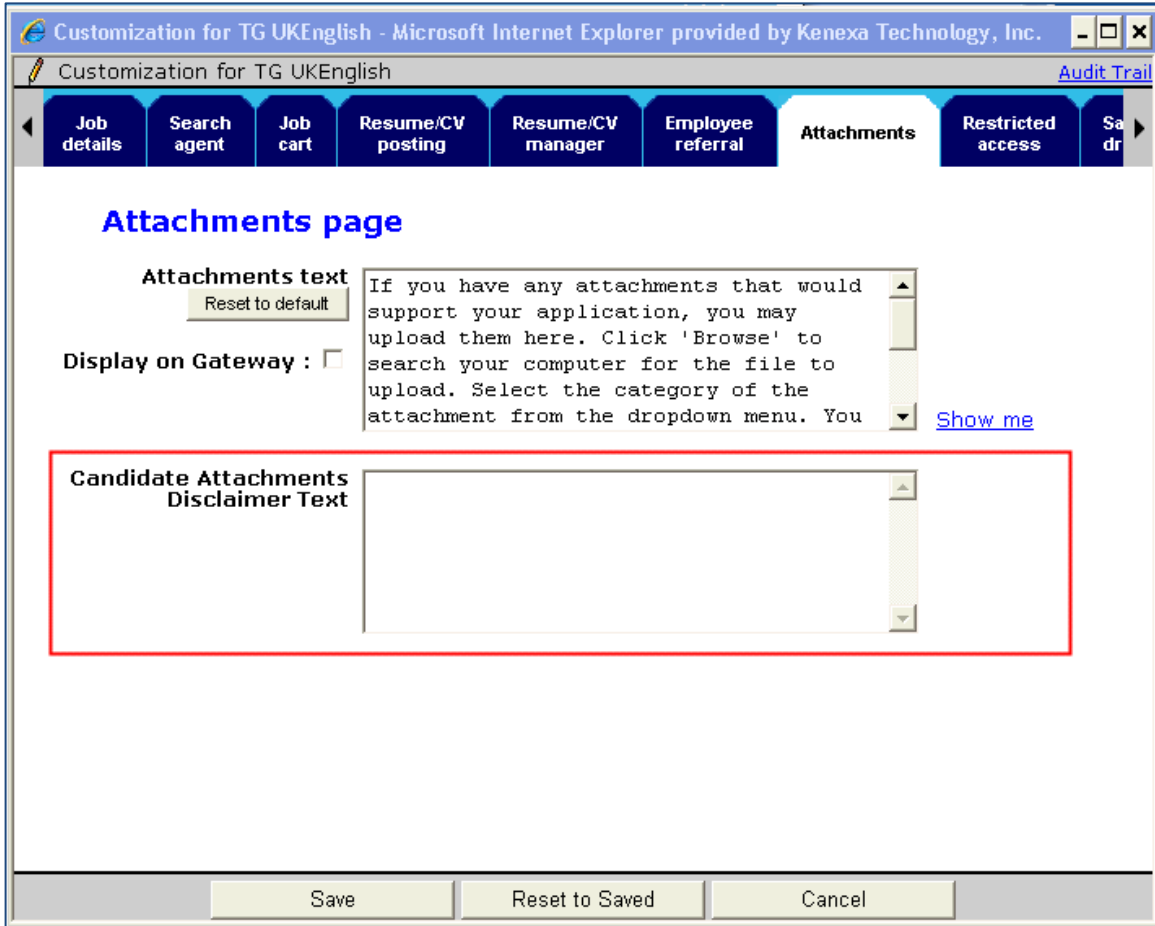
4. Enter text in the **Candidate Attachments Disclaimer Text** box. Maximum allowable characters are 10,000.
5. Click **Save.**
   System validates and saves data.

Talent Gateways – Landing Page Enhancement

This feature enables candidates to directly link to the Talent Gateway (TG) Login page in Gateway Questionnaire (GQ) and non-GQ workflows.

Product RDP521 Rel 13.0	☑ 2x BrassRing ☑ Workbench Self-Service	☑ Talent Gateways
Visible Changes	☑ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	☑ Configuration required – contact your Kenexa Support Team for implementation details.	

Feature Description

Enabling this feature enhancement allows candidates to experience a seamless workflow when applying to jobs on a TG. When candidates apply from an external site to positions on a TG they are directly linked to the login screen. This enhancement includes GQ and non-GQ workflows.

Before the introduction of this feature, candidates were required to click the Apply to job(s) button on the initial page AND on a subsequent jobs detail page before they could access the TG login page.

Non-GQ Workflow

When enabled for a non-GQ workflow, when a candidate applies to a position on a TG, they are directly linked to the login screen. For example, the following screen shows a job search results page.

Candidate selects a position and clicks the Apply to job(s) button. The login page displays:

Log in

Enter your e-mail address and password to access your profile and job seeker tools. (This is default "Log in intro text", can customize)

Already have an account?

E-mail address: [_____]

Password: [_____]

[Continue]

Forgot your password?

First time here?

Click here to create a login. It's free and required.

Candidate logs in and completes the job application process.

GQ Workflow

When enabled for a GQ workflow, when a candidate applies to a position on a TG, they are directly linked to the login screen. For example, the following screen shows a job search results page.

Search results Your search: N/A | Refine search

Results 1-9 of 9

Page 1

[View job(s)] [Apply to job(s)] [Send to friend] [Create search agent] [Save to cart]

Clear checked

	Title	Location	Department Name	Job Level	Job Type	Date updated
☐	Desktop Support Analyst	Boston	Sales Associate	Experienced	Full Time	02-Mar-2005
☐	Desktop Support Analyst	Boston	Client Services	Experienced	Full Time	11-Feb-2005
☐	Network Administrator	Boston	Internet Services	Senior Management	Full Time	11-Feb-2005
☐	Administrative Assistant	Boston	Client Services	Experienced	Full Time	11-Feb-2005
☐	Auditor	San Francisco	Legal	Experienced	Full Time	11-Feb-2005
☐	Java Developer	Boston	Engineering			04-Feb-2005
☐	Keyboard Operator	Oakland	Sales			04-Feb-2005
☐	Account Mgr	Los Angeles	Client Services			04-Feb-2005
☐	HR Representative	Los Angeles	Client Services			04-Feb-2005

[View job(s)] [Apply to job(s)] [Send to friend] [Create search agent] [Save to cart]

Candidate clicks the Apply to job(s) button. The login page displays:

Candidate logs in and completes the job application process.

How Do Clients Get this Feature?

This feature is controlled by a new Talent Gateway setting. Please contact your CSC or certified Workbench Self-Service user for more information about enabling this feature.

Limitations and Known Issues

This project does not include SSO (Single Sign On) gateways.

Workbench Self-Service Certified Users

Use the following procedure to enable this new Talent Gateway feature.

In WB:

1. **Tools > Talent Gateway > Admin.**
   The Talent Gateway Administration Page displays.
2. Select a Gateway and click the **edit** icon.
   The Talent Gateway details page displays.

3. Select the checkbox next to the new setting, **Go Directly to login page from external URLs.**
4. Click **Save**.
   The new TG setting is saved.

Talent Gateways – Relabel Send to Friend Button

Organizations can now customize the label for the "Send to Friend" button that appears on the Search Results and Job Details pages of Full Talent Gateways.

Product **RDP533 Rel 13.0**	☑ 2x BrassRing ☑ Workbench Self-Service	☑ Talent Gateways
Visible Changes	☑ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	☑ Specific conditions required – see details below.	

Feature Description

Organizations using "Send to Friend" functionality can customize the Send to Friend button label on full Talent Gateways (TGs), including Employee Referral Gateways. This button appears on TG Search Results and Job Details pages.

Sample Search results Page Showing Send to friend Button

Sample Job details Page Showing Send to friend Button
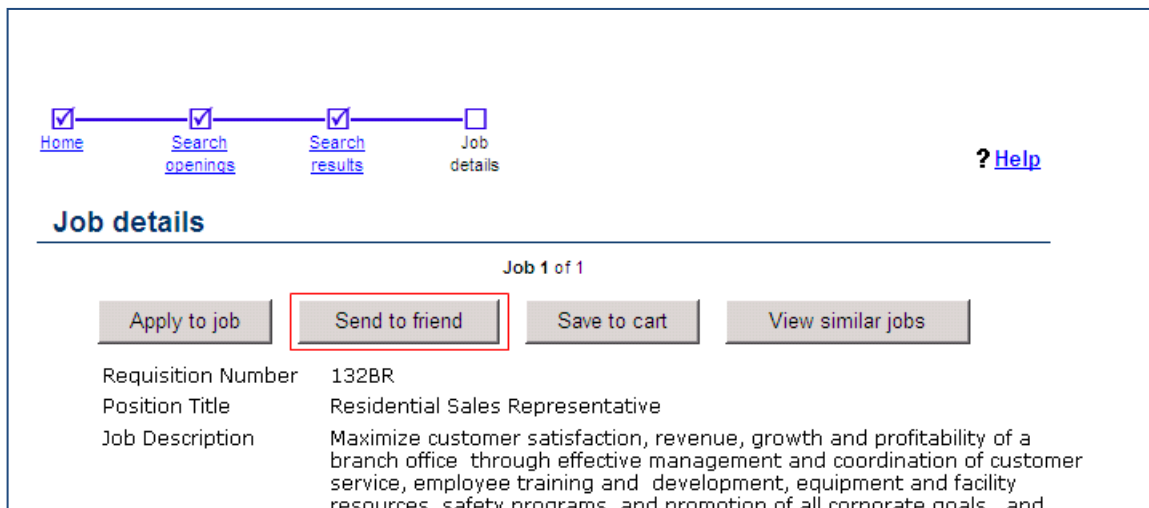
2x BrassRing users will see no visible changes.

Limitations and Known Issues

Default "Send to a friend" email text is not changing. You may wish to consider customizing this text after customizing your button text,:

> Your friend has found job(s) at [clientname] that you might find interesting.

Please click the following link(s) to view job(s).
[loopstart][requrl][autoreq] - [jobtitle] [new line][loopend]

Best regards.

How Do Clients Get this Feature?

This feature is controlled by a new Talent Gateway text customization settings. Please contact your Kenexa Support Team or Certified Workbench User for more information.

Workbench Self-Service Certified Users

Talent Gateway text customization includes a new '**Send to friend button text**' setting on:

- **Search results** tab
- **Job details** tab of the TG text customization UI.

You must customize the button on both tabs to change the label on both pages.
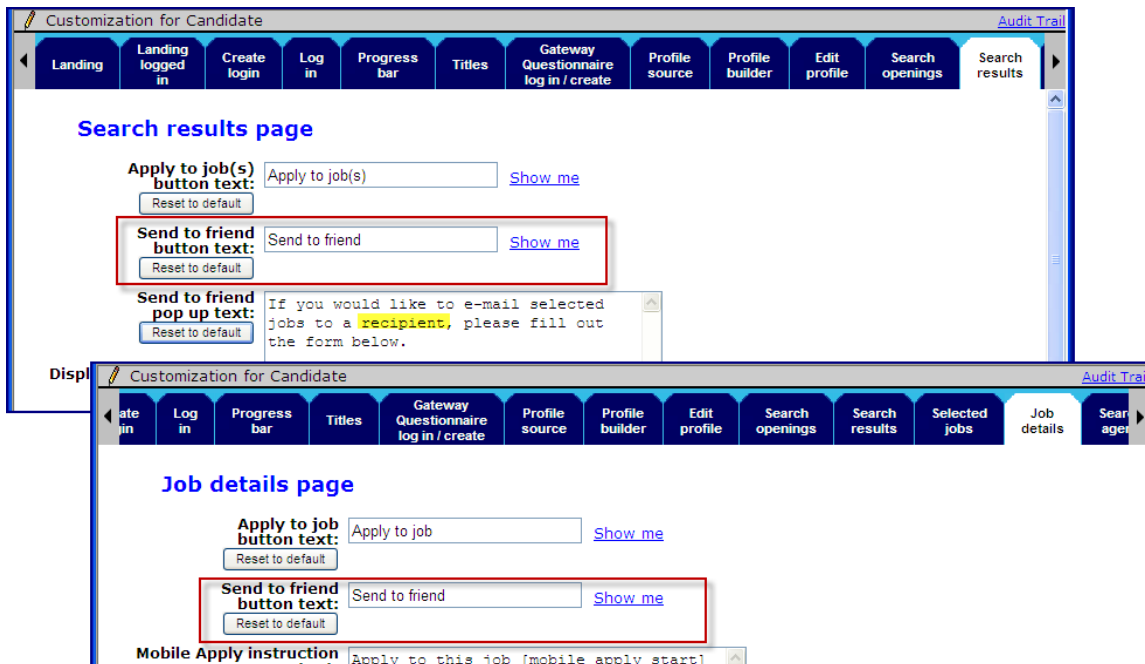
To customize the button:

1. Select **Tools > Talent Gateways > Text customization > Edit** [selected full Talent Gateway].
2. Change the label on the Search results and the Job details tabs, as desired. Your customized label can be up to 35 characters, but allows no HTML.
3. To preview placement and new text, click **Show me** link (and **OK** to close the preview window).
4. **Save** the changes.
5. Select the TG just edited and click **Synchronize changes with Talent Gateways**.
6. To verify your changes if desired, click **Launch Talent Gateway** from the Talent Gateway text customization page, and perform a search (logged in or not logged in) to see the "Search results" page for the TG. Select a job to view "Job details" page.

Additionally, the word "friend" was also changed to "recipient" to be more generic in the following default text for two settings:

"If you would like to e-mail selected jobs to a recipient, please fill out the form below."

The two settings are:

- **Send to friend pop-up text** on the **Search results** tab (**Tools > Talent Gateways > Text customization > Edit** [selected full Talent Gateway] > **Search results** tab).

- **Sent to friend text** on the Talent Gateway details page (**Tools > Talent Gateways > Admin > Add new Talent Gateway > Save and continue** to **Step 2**
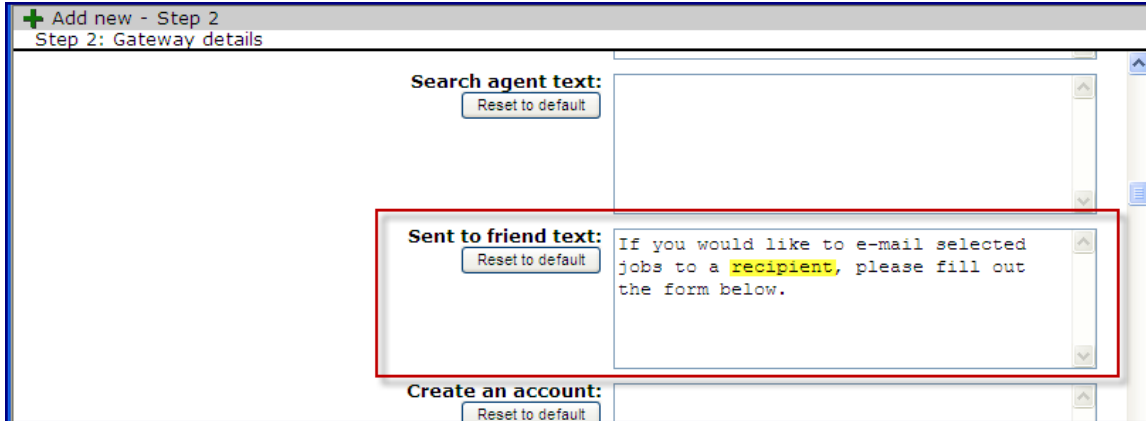
This wording change affects new Talent Gateways only.

All of the preceding settings are disabled if the TG Admin "Special configurations"' setting, **Disable send to a friend** is checked.

User Privileges – Save User Type as New

This feature allows users to create duplicate user types that replicate the user type and all user type associations such as forms, form fields, candidate types, and New UI panels.

Product **RDP570 Rel 13**	þ 2x BrassRing
Visible Changes	þ **No – requires specific conditions for visibility.**
How do I get this feature?	þ **Automatic – see details below.**

Feature Description

This feature allows users to duplicate user types as a shortcut when creating new ones. When a user clicks Save User Type as New, the user type and all its associations such as forms, form fields, candidate types, and New UI panels are saved to the new user type. Refer to the following list of user type associations.

User Type Associations

The following is a list of user type associations. When a user is saved as a new user type, these associations are automatically saved to the new user type.

- User type permissions
- User interface settings
- Admin HR Status preferences
- Panel user type preferences
- User type panel mapping
- Custom help links
- Candidate forms
- Screen display defaults
- Field attributes -- Hide for the user types/Required for these user type
- Administer req fields
- Administer Req subsidiary forms and form fields
- Document subsidiary forms
- Req status change addendum
- Candidate type search

How Do Clients Get this Feature?

This feature is controlled by a Workbench user type action. Please contact your Kenexa Support Team for more information.

Kenexa Tasks

The Save user type as new option is visible in Workbench (not Self-Service).

To save user type as new:

1. Select Tools > Users > User Types.

2. Select a user type and click **Save user type as new**. The Save as new user dialog box displays.

3. Enter the name of the new user type in the User type name text box.
4. Click Save.

The new user type and all associations to the original user type are saved. You can now edit that type to make any desired changes if you wish.

Kenexa 2x BrassRing®

Release 13.0, Build 0 Visible Changes

This section describes the 2x BrassRing visible changes in this build, proposed for release on December 15, 2011.

Cumulative documents with visible change information for previously released builds are available on the User Resource Center. See the Release 12.5 Resources section for R12.5 builds (cumulative from Build 0) and R12.4 builds (R12.4 Build 1 through 12.5 Build 0); see Release 12.3 Resources for R12.3 builds.

Summary of Visible Changes in this Build

Feature	Description	Page
Social Media – Source of Candidate	A new "Add Social referral link" is available in system email templates in the Communications module LDP087	2
Document Generator – Relationships Between Tokens, Blurbs, and Documents	View blurb and View document template pages now include a "condition statement" for clients using multi-condition blurbs LDP064	3
Gateway Questionnaires – Pre-Filled Responses per Site	GQ response pre-population, for responses previously filled, now occurs only if the sites through which the responses/GQs were submitted are the same 182952 / 100910	3
New UI – Actions for Req Panels	All actions available from the 2xB classic Actions menu are now available in the Actions menus on the Req panels LDP090	2
Event Manager - Enhancements	Several Event Manager usability enhancements are included in this build LDP078	4
Resume Extraction – Language Support	Resume extraction now available for French Canadian & Traditional Chinese Talent Gateways RDP563b	5
Interview Builder – View Enhancement	2xB users can view the interview guides attached to a job req RDP573	6
Social Source Integration – Linking of New Leads	Leads created in Social Source are now automatically linked to matching 2xB records LDP093	7

Talent Gateways – State/Region Sort for Country = China	State/region sort when the Country value is "China" will now be alphabetical 180100/ 97188	8
Data Insight Tool – Social Media Sources	Candidate source information on candidates sourced through social network sites is now available for filter and output LDP087	8
Release 13.0 UI Language Support – Translations	**Translations Expected in Release 13.0 Build 2, February 2, 2012** Clients with additional purchased languages, please note: the UI updates are currently beginning the translation process. The translated UI is expected to be in production in Build 2. When ready, notice will be included in the applicable Visible Changes document.	

1. Social Media – Source of Candidate

For clients with "Social media integration" enabled, users with the "Add system email template" privilege will see a new hyperlink, "**<<Add Social referral link**" with this build (in **Admin > Communications > System email templates > Add/Edit system email template**).
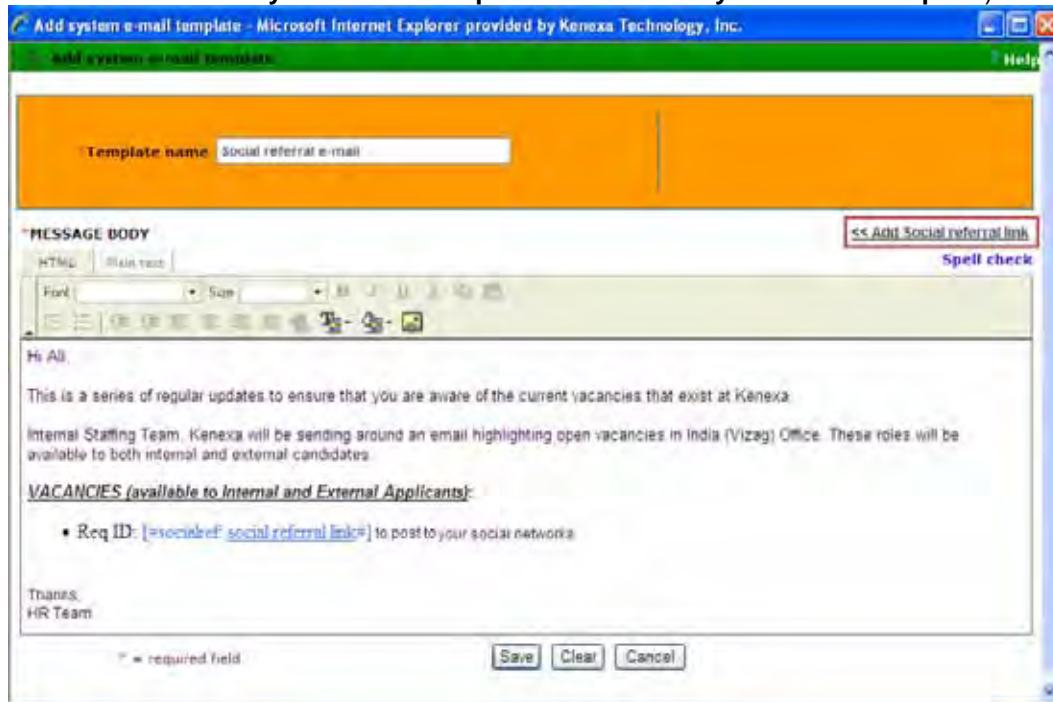
You can click the link to add a new merge token to the email template: [#socialref: social referral link#]. The value of this token is replaced with ReqID – Job Title – Click here, where:

- ReqID – displays Auto Req ID and the hyperlink target is the Job Details page

- Job Title – Corresponding job title of the req

- Click here – takes recipient to "Post to my social networks" page of the corresponding ReqID on Talent Gateway.

2. Document Generator – Relationships Between Tokens, Blurbs, and Documents

For clients with multiple-conditions blurbs enabled, the existing **View blurb** and **View document template** pages will now include a "condition statement" at the bottom of the page. It displays if:

- Multiple conditions on blurbs client setting is turned on AND have configured blurbs with one or more conditions.

- Have Enable pre-filtered document templates client setting turned on AND have configured document templates with one or more pre-filtering conditions.

Allow blurb selection during document/e-mail creation	No	
Select blurb category		
Make blurb conditional?	Yes	
Display blurb when		
Condition	([LDP052 Cand Form]Auto	**Org groups**
Value=		QE
		OR
Condition	[LDP052 Cand Form]CK)	**User types allowed to modify blurb text during document e-mail creation:**
Value=	CK1 CK2	**OR** Super User
Condition	([LDP052 Cand Form] AutoCus	**Active blurb** Yes
Value=	Desc No 2 English	**OR**
Condition	[LDP052 Cand Form]Muli)	
Value=	Mul1	
Condition statement	Condition statement will appear here as a Boolean-type of statement that is identical to the way it is stored in the database. User will be able to copy the condition statement and paste it into the Text string search field (max of 150 characters).	

3. Gateway Questionnaires – Pre-Filled Responses per Site

For Talent Gateways (TGs) with pre-filled responses enabled for Gateway Questionnaires (GQs), pre-filled responses will be pre-populated on a subsequent submission only from the original submission on the same specific site (TG). This resolves an issue for clients who send multiple different standalone GQs (each through it's **own** TG) out to candidates and want each to pre-populate if it is sent the second time.

The following example illustrates how pre-filling will now work for a GQ mapped to two reqs that are posted to two TGs.

1. Candidate logs into TG1, applies to ReqA and fills the responses.

2. Candidate then applies to ReqB. The previous responses are pre-filled (from the application to ReqA on same site TG1).

3. Candidate afterwards logs into TG2, applies to ReqA and fills the responses. Note that they are **NOT** pre-filled from the prior application to ReqA through TG1, as they would have been before this change.

4. Candidate then applies to ReqB on TG2. The responses are pre-filled (from the application to ReqA on same site TG2).

New behavior is that responses are pre-populated from the original submission on same site only, which means pre-filled responses are specific to a TG.

4. New UI – Actions for Req Panels

All actions available from the 2xB classic Actions menu are now available in the Actions menus on the Req panels, including: All Open Reqs, My Open Reqs, All Reqs Pending Approval, My Reqs Pending Approval. (Some actions are not available from Pending based on classic functionality.)

- All actions except Edit currently support only one selection (this will be changing with future releases).

- The classic actions "Edit" and "Update Multiple" have been merged into one action called "Edit" (users with "update multiple" privilege, the user can select more than one req to edit).

- All actions honor existing user type privileges (actions do not appear when the user does not have the privilege).

- Actions are grayed out when not available in the current state (nothing is selected, more than one item is selected, etc.).

5. Event Manager – Enhancements

The following enhancements are included in this build.

Build Messages: The errors and warnings displayed in the Build Messages section when event schedules are built have been rewritten to be more intuitive and instructive.

Multi Language Candidate Communications: The Event Manager candidate record now includes a Language field that displays the language associated with the candidate as sent to Event Manager. To better support client needs around managing event-related communications with candidates who speak different languages, a new system setting is available on the System General page in Event Manager Admin. The system setting is "Multi Language Candidate Communication." It is set to No by default, which means that the new functionality is not automatically available/visible.

When set to Yes, users see a new Language column on all candidate listings within Event Manager, such as the Unscheduled Candidates page, the Scheduled Candidates page, Candidate Search, and the Candidates tab on the Event configuration page. The Language column displays the language associated with the candidate in Event Manager, and is sortable so you can group your candidates by language. Clients who enable this system setting and have purchased more than one language for Event Manager can configure Event Batches to send different messages to candidates who are associated with the purchased languages.

To ensure that message tokens used in Event Manager messages can be displayed in different languages, the following fields can now be expanded to allow entry of values for each purchased language:

Event configuration:

- Event Name

- Event Date

- Description

- Location Details (if Other is chosen in the Location field)

- Room Name

- Activity Name

Event Template configuration:

- Template Name

- Description

- Room Name

- Activity Name

These additional fields per purchased language allow you to translate these values so that any Event Manager messages sent to candidates of that language using Event Manager message tokens will appear in more appropriate terms.

Additionally, Event Manager message tokens that are hard-coded, such as the hyperlink name for the event registration link and parts of the candidate schedule, display in the candidate's language if it has been purchased for Event Manager.

Save As New Event: When users click Save on the Save as New Event page, the system automatically builds the schedule of the new event similar to what happens when Save as Single Event is clicked on the Event page. When the schedule is built, the number of errors and warnings generated is displayed, with the option to view the schedule to see the details. If Event Change Notifications is enabled, the option to notify participants of the new event is also available if the new event has either assessors or candidates scheduled. These changes ensure that events created using the Save as New Event action are treated the same as events created using the New Event action.

Parallel Activity Groups: A new setting in the Parallel Activity Group configuration within both events and event templates is called Type. Parallel Activity Groups allow you to configure a group of activities that should be scheduled at the same time. The Type field has two options:

- Individual candidates are scheduled for all activities in the group – with this option, multiple instances of the activity are scheduled throughout the time slot so that each candidate is scheduled for an instance of each activity in the group. This is the default setting that is consistent with how parallel activity groups currently work.

- Individual candidates are scheduled for one activity in the group – with this option, one instance of each activity in the group is scheduled in parallel. Candidates will be scheduled to one of the activities.

6. Talent Gateway and Agency Manager Resume Extraction – French Canadian & Traditional Chinese

Resume extraction will be supported for Talent Gateway and Agency Managers with Traditional Chinese or French Canadian locales as of this build (Build 0). For candidates submitting resumes

in Traditional Chinese or French Canadian, extractable fields (contact info, education, experience) will automatically be extracted to the 2xB candidate profile.

7. Interview Builder – View Enhancement

For clients using Kenexa Interview Builder (KIB), all 2xB users with the Integration user type privilege, "Interview Builder – Print/Send Interview," enabled will see the following changes when adding or editing a requisition, viewing req details, or eLinking a req. Users without the privilege will see no change in current behavior.

Users preview interviews associated to the job code from the Add req or Edit req page by selecting interviews from the list and clicking the new hyperlink "View Interviews."
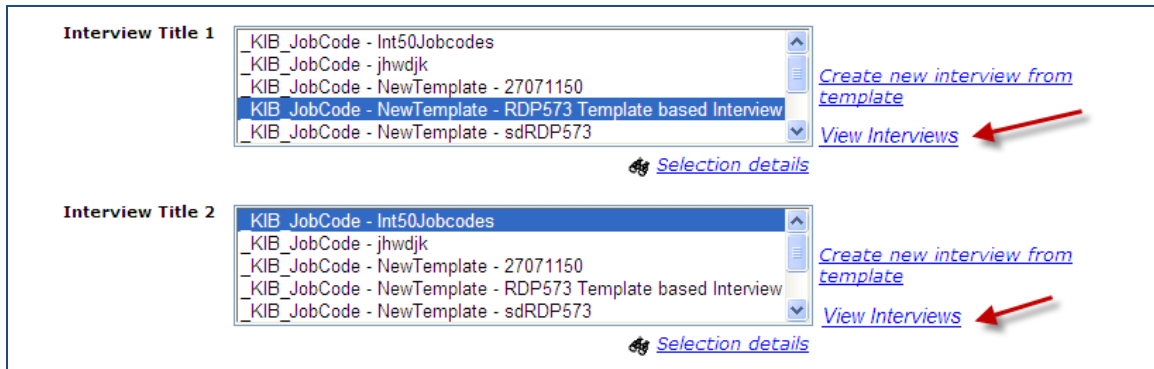
This links to the "Open interview" window in KIB, or to the "Interview form" window in KIB if the clicked hyperlink is for an interview title that contains only one interview and one form associated to the job code.

Similarly, when users view Req details or eLink a req to view, edit, or approve it, each Interview title name is a hyperlink to the "Open interview" window on KIB.

In all cases, the Open Interview screen in KIB has interview information appropriately pre-populated from 2xB. There are no changes to current functionality within KIB. The user can select (as necessary) and open the desired form.

Open Interview Screen in KIB

Interview Form Screen in KIB

Before this change

Users required Admin access in order to use the Admin menu to manage job codes. They could then preview an interview by editing the interviews attached to a job code.

8. Social Source Integration – Automated Linking of New Leads to Matching 2xB Candidate Records

Leads created in Social Source are now automatically linked to matching 2xB records. On the TalentFilter results page, individuals with a matching record (based on email) in 2xB will also have a visual indicator that lets the user know those individuals already exist in 2xB. The indicator will also have hover text: "This email address was found in 2xB."

9. Talent Gateways – State/Region Sort for Country = China

For Talent Gateways and Agency Manager, the sorting of State/Region values presented when the Country value is "China" will now be alphabetical. Before this change, Chinese states/regions sorted geographically from north to south.

10. Data Insight Tool – Social Media Candidate Sources

For clients with Social Media integration enabled, Data Insight Tool users are able to report on candidate source information on candidates sourced through social network sites. A new category, Social Media, includes these fields:

- **Social media site name** – For example, Facebook, Twitter, Ln (for LinkedIn)

- **Posting user type** – For example, 2xB user, employee, Non 2xB user.

- **Social profile site type** – User account of the employee, candidate, and non-2xB users. For 2xB users, Social Media profile site type can be personal, corporate, or group.

- **Posted by** –- Name of the person who posted the job to social media site. The filter grid displays the name followed by user type (candidate, 2xB user, employee and/or non-system user).

- **Posted on** – Date on which the job is posted to social media site

- **Posted req id** – Req ID posted to the Social Media site

- **Email address** – Email address of the person who posted the job to social media site. The filter grid displays the name and then in brackets user type (candidate, 2xB user, employee and/or non-system user).

The new fields are available in Filter, Security User Role and Output Worksheets (**Reports > Data Insight Tool > Manage templates > Create new template| Edit template** and **Reports > Data Insight Tool > Manage users and roles**).

Report Samples

What users posted to social media sites

Social media site name	Posting user type	Social media profile type	Posted by	Posted on	Posted req id	Email address
Ln	2xB User	Corporate	Maria Sutter	20-Sep-11	106BR	Maria.Sutter@ABC.com
Facebook	Employee	Personal	Peter Monk	22-Sep-11	101BR	Peter.Monk@Sys.com
Twitter	Non 2xB User	Personal	Mike White	25-Sep-11	123BR	Mike.white@gmail.com

What social media site is giving the best source yield

Req Id	Resume key	Candidate first name last name	Current HR status	Social media site name	Posting user type	Social media profile type	Posted by	Posted on
100BR	18901	Steve Smith	1st Interview	Ln	2xB User	Corporate	Maria Sutter	20-Sep-11
101BR	18902	Mark Reddy	Final Round	Facebook	Employee	Personal	Peter Monk	22-Sep-11
102BR	18903	Stephen Simon	2nd Round	Twitter	Non 2xB User	Personal	Mike White	25-Sep-11
100BR	18904	Steve Smith		Twitter	2xB User	Corporate	Maria Sutter	26-Sep-11

Notes for Internal Kenexa

The following features to be announced in the next major release have no visible changes in this build for 2xB without configuration, but may have visible configuration changes in Workbench Self-Service (noted below where applicable). Full enablement on these features will be available with the next release.

11. RDP587 Company Facebook Page Display Jobs Widget

Project provides Facebook widget for pulling job listing (with filters and job details pages) from 2xB for display on company's FB page.

WB:

Tools -> Settings -> Social Media configuration – New menu item to configure the necessary settings required by a client to display jobs on their Facebook page: "Social media configuration." Currently, configuration will support selection of only 1 talent gateway from which the jobs will be displayed in the Facebook widget, but the design has to consider accommodating selection of multiple TG's in the Facebook widget configuration in the future with minimal code changes.

See spec for WB details:

http://intappshare/EngMainSite/EngProj11/RDP587%20%20Facebook%20Page%20Display%20Jobs%20widget/RDP587-Functional%20Spec.docx
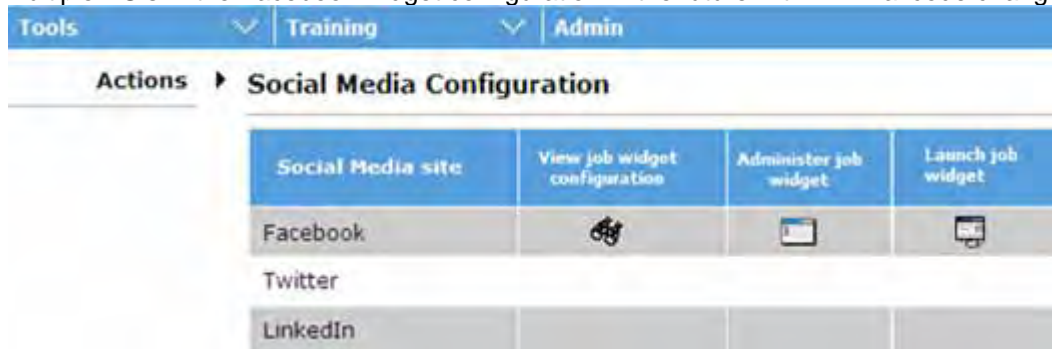
FB UI:

New Facebook app to pull Job listings from our TGs onto a Company's FB page; filtering for Country & Location/ State as well as Keyword & All Job types will be introduced later.

See POC spec for details:

http://intappshare/EngMainSite/EngProj11/RDP587%20%20Facebook%20Page%20Display%20Jobs%20widget/2xB%20FB%20App%20functional%20spec%20for%20POC.docx

12. RDP589 Retiring the "ProveIt!" Integration

The original integration with Kenexa Assessments, "Kenexa ProveIt!", is no longer being enhanced since it has been replaced by the newer, more robust "Searchable KAS". To ensure that new clients don't inadvertently enable the older integration and to reduce SE/QE burden with regard to regression, we will sunset the "Kenexa ProveIt!" integration.

There will be no migration script for any QA/Staging/Production clients currently enabled with ProveIt!, the "Integration Assessment" client setting for these clients will simply be reset to "None". Several steps have been taken to ensure there is no adverse impact to doing this.

See requirements document for additional information.

http://intappshare/EngMainSite/EngProj11/RDP589%20%20Sunset%20Provit%20integration/RDP589%20Sunset%20ProveIt%20Requirements.doc

13. RDP597 Replace AspEncrypt with Kenexa's EncryptionDotNet

AspEncrypt has several problems that make replacing it desirable. It will not work in a 64 bit environment and causes increased latency when multiple instances are used on the same machine. This slows down requests and causes instability. Project replaces calls to AspEncrypt with EncryptionDotNet in the .net side. Currently DIT and Workbench already have this done. For the VB6 code this component will be wrapped in a tlb file allowing the same code base to be used everywhere.

14. RDP613 Secondary Storage of Older PDF Resumes

"Older" resumes will be moved to secondary storage to relieve pressure on primary storage. The small delta in lookup time should not be noticeable to clients.

15. LDP015 RAM Phase 4 – Search Candidate RAM Log

New Workbench Self Service menu option for searching RAM log file (**Tools -> Automation Manager -> RAM Log**). A search box will be provided for searching the RAM logs for the last 2 years, with the ability to see the details for the last 30 days. The RAM logs can be searched by candidates in Build 0.

See spec for details:

http://intappshare/EngMainSite/EngProj11/LDP015%20%20Rules%20Automation%20Manager%20Phase%205/PROD%20MGMT/LDP015_Phase4_12%205B2-6%20searchlogs%20spec.doc

16. LDP064 Document Generator – Relationships Between Tokens, Blurbs, and Documents

See the item in the external section also. This project provides a mechanism for reviewing the impact of content changes to a blurb, template, or field on the content of other blurbs, tokens, and templates. A new tool allows users to review the relationships, selecting:

- a template, and view all blurbs, fields, and field conditions within the template,

- a blurb, and view all related templates, fields, and field conditions

- a field, and view all related templates, blurbs, and field conditions

Workbench Self-Service: new Communications user type privilege will be visible, "Relationship views – templates, blurbs, and fields." A new menu item in the Communications menu, "View relationships," displays when the privilege is checked for a user type.

See the spec for details:

http://intappshare/EngMainSite/EngProj11/LDP064%20%20Doc%20Generator%20Ability%20To%20Show%20Relationshps/PROD%20MGMT/LDP064_FunctionalSpec_TemplateBlurbFieldRelationships_DRAFT8inProgress.doc

17. LDP074 – Candidate Forms Redesign

Many Workbench Self Service changes

Branding/Logos on Candidate Forms:

- New form template setting **Form image**, to choose if the form should have no image, utilize the client image, or upload a special image just for this form type.

- A secondary setting, **Image alignment**, will allow alignment of the image on the top of the form (left, center or right) for forms added/edited/viewed from within 2xBrassRing.
  Tools | Forms| Candidate forms | Edit form attributes

- See spec for details:
  http://intappshare/EngMainSite/EngProj11/LDP074%20%20Redesign%20Candidate%20Forms/PROD%20MGMT/Branding/LDP074%20-%20Branding%20-%20FUNC%20SPEC.docx

Enhanced Form Layout – Visible changes to Candidate form details page and Candidate forms listing page. Layout settings will allow formatting form layout structure.

- New screen to configure the layout of a form, **Tools > Forms > Candidate forms > Form layout**.

- Form layout modification screen can be opened using the plus ✚ icon under the new "Form Layout" column available on form listing page.

Tools > Forms > Candidate forms > Form Layout

- New setting on Edit form attributes screen, **Form layout**, with values **Classic** and **Enhanced (Tools > Forms > Candidate forms – Edit form attributes)**. Allows client to 'turn on' the enhanced layout for a form once the layout configuration is complete.

- See spec for details:
  http://intappshare/EngMainSite/EngProj11/LDP074%20%20Redesign%20Candidate%20Forms/PROD%20MGMT/Enhanced%20Layout/LDP074%20-%20EnhancedLayout%20-%20FUNC%20SPEC.docx

Field Help Text

- New field attribute, **Field help text**, on all field types, visible to WBSS users.
  Tools > Forms > Candidate forms > Administer form fields > Edit field attributes
  Tools > Forms > Document subsidiary forms > Administer form fields > Edit field attributes

  When forms fields have help text, 2xB users see clickable icon 🛈 in Add and Edit mode (not in View Mode)

- New action, **Translate field help text** (**Tools > Forms > Candidate forms > Administer form fields**)

- See spec for details:
  http://intappshare/EngMainSite/EngProj11/LDP074%20%20Redesign%20Candidate%20Forms/PROD%20MGMT/Field%20Help%20Text/LDP074%20-%20Field%20help%20text%20-%20FUNC%20SPEC.docx

Non-editable by User Type
Required by User Type

- WBSS: New field level attributes.
  Non-editable for these user types controls whether the user completing the form can edit the field or just be able to see the data.
  Required for these user types controls whether a specific candidate form field is required to be completed *for a particular user type(s)* prior to saving a candidate form.
  Tools > Forms > Candidate forms > Administer form fields > Edit field attributes
  Tools > Forms > Document subsidiary forms > Administer form fields > Edit field attributes
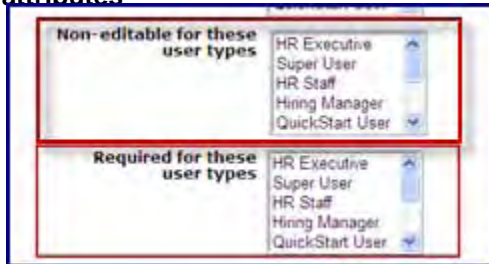
- See specs for details:
  http://intappshare/EngMainSite/EngProj11/LDP074%20%20Redesign%20Candidate%20Forms/PROD%20MGMT/Non-editable%20for%20these%20user%20types/LDP074%20-%20Non-editable%20by%20User%20Type%20-%20FUNC%20SPEC.docx

- http://intappshare/EngMainSite/EngProj11/LDP074%20%20Redesign%20Candidate%20Forms/PROD%20MGMT/Required%20for%20these%20user%20types/LDP074%20-%20Required%20by%20User%20Type%20-%20FUNC%20SPEC.docx

Question Branching – visible changes in Workbench in the candidate form field attributes page. Allows clients to control whether a candidate field appears (or not) based upon the response of another field. The new Question Branching section and settings will be on the first 'page' of field attributes.

- **Tools | Forms | Candidate forms | Administer form fields | Edit form field**
  Tools | Forms | Document subsidiary forms | Administer form fields | Edit form field
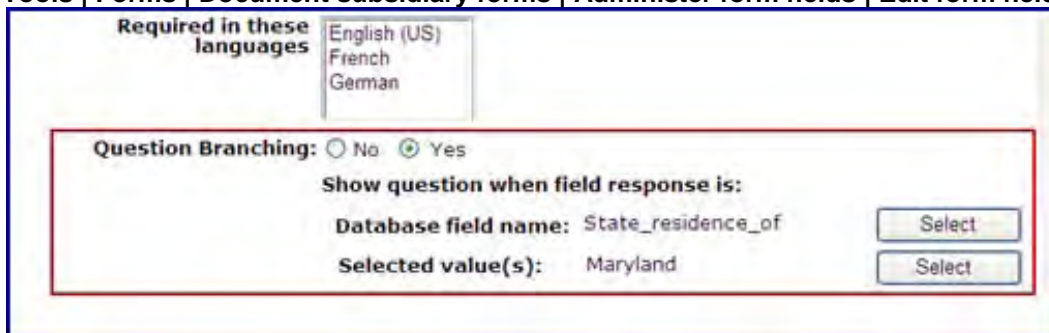
  For example: Add form – Parent option selected = Maryland. The questions having to do with Maryland will appear when 'Maryland' is selected allowing specific questions to be required without impacting other candidates.

- See spec for details:
  http://intappshare/EngMainSite/EngProj11/LDP074%20%20Redesign%20Candidate%20Forms/PROD%20MGMT/Question%20Branching/LDP074%20-%20Question%20Branching%20-%20FUNC%20SPEC.docx

Import/Export Field Attributes

- Several new field attributes have been added to candidate form field configuration: **Required for usertypes**, **Non-editable for usertypes,** and **Field help text (locale)** will be available for

import and export via Workbenc (**Tools > Forms > Candidate forms > Administer Form fields > Export to excel** (action)).

- See spec for details: http://intappshare/EngMainSite/EngProj11/LDP074%20%20Redesign%20Candidate%20Forms/PROD%20MGMT/WB%20Import-Export%20field%20attributes/LDP074%20-%20WB%20Import-Export%20FUNC%20SPEC.docx

- There are visible changes coming with LDP078. I don't have access to the spec or the SharePoint site, but I am pretty sure that the spec posted has something written in the CCR/Visible Changes section. I will be back in the office on Monday and can take a look and send something to you then, but I wanted to let you know in case that was too late. -Rob

18. LDP082 Req Management Workflows

Nothing visible.

19. LDP087 Social Media Source of Candidate

See the item in the external section also. Project goal is to provide candidate source (LinkedIn, Facebook, and Twitter) along with the details of the job posting, such as who posted the job (2xB user/Candidate/Employee/Social Media User). Social media source will be linked to candidate's Talent Record.

- Build 0 has Social referral email communication templates functionality that becomes available with a new Reqs 2 user privilege, "**Social Networks – Send Social referral email**." A new hyperlink, "**<<Add Social Referral Link**", is introduced in Add System Email template screen (for clients with "Social media integration" enabled). For example, user enters text, "Click here to Post to Social networks" within the text area, selects "here" and clicks on the hyperlink to add the hyperlink merge token in that position in the email template. The new merge token available for email system templates is [#socialref: social referral link#]. The value of this token is replaced with ReqID – Job Title – Click here

- Users with a new Reqs 2 user privilege, "**Social Networks – Send Social referral email**" see a new action, "Send Social referral email," on All/My Open Reqs panels and reqs grids with open reqs. Clicking it opens a new popup window "Send Social referral e-mail."
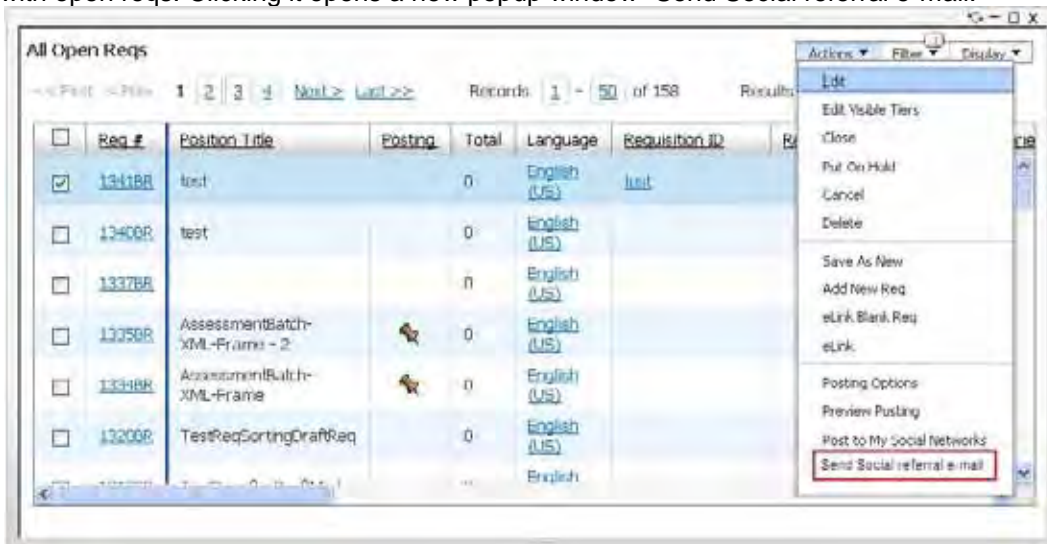
- Displaying social media source on Talent Record is controlled by new Reqs 2 user privilege "**Social Networks – Source information**."

As of 12.5.5, we are storing the social media posting history in a table that captures details such as SM Site, Posted by, Posted Date, Message etc. This data is attached to the job posting URL with a unique identifier and the same is linked to candidate's Talent Record through TG when a candidate completes job application successfully.

As of 12.5.6, Talent Record displays the SM source and name of the person who posted the job to that social media site. Social media source information displays on Talent Record in two ways: Tooltip on mouse hove, and Pop-up window on mouse click.

Also as of 13.0.0 a DIT report on source is available.

See spec for details:

http://intappshare/EngMainSite/EngProj11/LDP087%20%20Social%20Media%20Source%20of%20Candidate/PROD%20MGMT/LDP087_FunctionalSpec.docx

The Preview function in WB for a Gateway Questionnaire shows you the flow of the GQ, letting you proceed from page to page in the GQ. The function is not designed to open and render attachments that may be uploaded. The best way to view an attachment you've uploaded is to browse to the location from which you uploaded it and open it there.

NOTES

Build 1 – add/craft announcement that New UI is becoming The UI in about a year Rel 13.2.

Release 12.5, Build 6 Visible Changes

This section describes the 2x BrassRing visible changes in this build, proposed for release on November 23, 2011.

Cumulative documents with visible change information for previously released builds are available on the User Resource Center. See the Release 12.5 Resources section for R12.5 builds (cumulative from Build 0) and R12.4 builds (R12.4 Build 1 through 12.5 Build 0); see Release 12.3 Resources for R12.3 builds.

Summary of Visible Changes in this Build

Feature	Description	Page
Pop-up Windows – Expanded Size	Size is expanded to reduce need for users to expand to view full contents RDP562	17
Reqs – Closing Confirmation Automatically	When users successfully save changes to reqs or requisition defaults, the confirmation pop-up will close automatically after 1-2 seconds 184055	18

1. Pop-up Windows – Expanded Size

The size for many 2xB pop-up windows at opening is being increased in order to reduce users' need to re-size or scroll for a full view or access to buttons. The following shows an example of the before and after sizing.
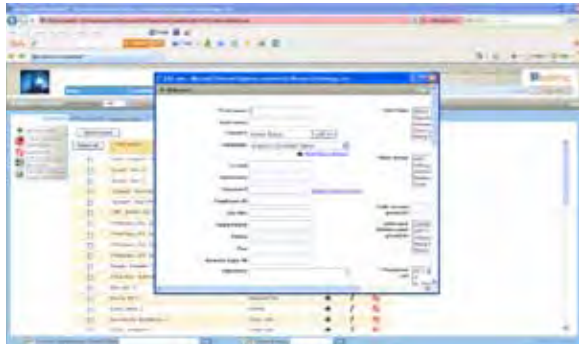
Before   **After**
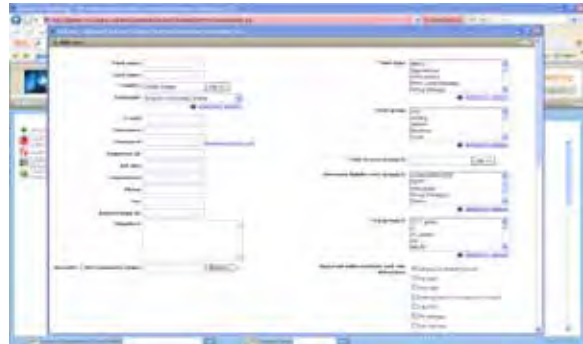
Each of the following pop-up windows (names in bold) will be maximized or adjusted depending on their content and page dynamic:

Posting options   **Edit posting options**

Posting options - Talent Gateways (section)

[Edit site questions >]   **Talent Gateway site questions**
[Talent Gateway site questions > Add a question >]   **Add question**
[Talent Gateway site questions > Edit score (icon) >]   **Edit score**

Posting options - Agency Managers (section)

[Edit site questions >]   **Edit Agency Manager site questions**
[Edit Agency Manager site questions > Add a question]   **Agency Manager site questions**
[Select/Edit Agency access]   **Select agency access**

Send communications

Email agency contact > **Send communication - Email Message**
Create documents: Create document for [<CandidateName>] - Document template
Send communication - Email Message
Send communication - Document packet (to Candidate portal)

Communications - Templates

Add/Edit e-mail template
Add/Edit document template
Add/Edit blurb
Add/Edit Document packet template

Users   **Add/Edit user**

Candidates – Search

Edit search fields
Edit output fields

[Quick Search] Search > Search results

Search results page (with candidate grid)
Search results page (with Req grid)

Candidate form > Add a form

Form list for: [<CandidateName>]
Form name for: [<CandidateName>]
Multiple forms list for: [<CandidateName>]

HR Status   **View status for [<CandidateName>]**

[New UI] Talent record > Ribbon

Attachments: [<CandidateName>]
Referral Type > Agency: Agency contact information for [<CandidateName>]
Referral Type > Referral name: Referral history for [<CandidateName>]

2. Reqs – Closing Confirmation Automatically 179184

When users successfully save changes when editing reqs, draft reqs, or their req defaults, the pop-up displaying the confirmation message will close automatically after 1-2 seconds. Workflow remains unchanged if the form is not successfully saved or deleted.

Before this change

Users had to close by clicking an **OK** button.

Notes for Internal Kenexa

The following features to be announced in the next major release have no visible changes in this build for 2xB without configuration, but may have visible configuration changes in Workbench Self-Service (noted below where applicable). Full enablement on these features will be available with the next release.

3. RDP575 Social Media share buttons on TG Job Details page

Project provides the following social media buttons on the TG job details page: Facebook like button, Tweet button & LinkedIn share button created using the API's from Facebook, Twitter & LinkedIn.

WBSS: New TG level setting "Social media integration - Show share buttons on Job details page" (Tools -> Talent Gateways -> [Talent Gateway Selection] -> Add/Edit properties).
New setting will not affect the Profile import from Social Media sites and other profile builder functionalities with respect to social media. This will affect only the social media buttons on Job Details page.

See spec for additional info:

http://intappshare/EngMainSite/EngProj11/RDP575%20%20Social%20Media%20buttons%20on%20Job%20Details%20page/RDP575-Functional%20Spec.docx

4. RDP580 HireVue Background Check Integration

New Background Check vendor, HireVue. See spreadsheet for field mapping:

http://intappshare/EngMainSite/EngProj11/RDP580%20%20Hirevuew%20Integration/BackgroundCheck_request_field_mapping_HireVue.xlsx

5. RDP587 Facebook Page Display Jobs widget (Research stage – will become an LDP)

Project creates a Facebook widget to pull in & display job listing with filters & job details pages from 2xB to a company's Facebook page.

WB: New menu item, "Social media configuration" to configure the necessary settings required by a client to display jobs on their Facebook page. For the design of the Facebook Jobs Widget & the UI details refer to Facebook app POC functional spec:

http://intappshare/EngMainSite/EngProj11/RDP587%20%20Facebook%20Page%20Display%20Jobs%20widget/2xB%20FB%20App%20functional%20spec%20for%20POC.docx

Also more info on the proposed changes and widget in this spec:

http://intappshare/EngMainSite/EngProj11/RDP575%20%20Social%20Media%20buttons%20on%20Job%20Details%20page/RDP575-Functional%20Spec.docx

6. RDP599 Extraction Engine Research

Research stage for future extraction engine.

7. RDP611 Out of the Box Mapping Tool Changes

The out of the box 2xB solution consists of predefined fields for foundation, JCDD, and user xml integrations. Because the fields are standard for all OOB clients we can use standard configuration scripts, standard sample xml files, a pre-defined data mapping document and Kenexa configuration can be completed within a 4 week time frame. This facility will be added through implementation of this RDP.

For info on the Mapping Tool changes, see the spec:

http://intappshare/EngMainSite/EngProj11/RDP611%20%20Out%20of%20the%20Box%20mapping/RDP611_FunctionalSpec.docx

8. RDP613 Secondary Storage of Older PDF Resumes

Internal: testing and extension of secondary storage project to relieve pressure on primary file storage.

9. Ticket 183388 Move "Allow communication template html source code editing in WYSWYG editor" client setting out of Restricted Settings area

For RDP498, the client setting "Allow communication template html source code editing in WYSWYG editor" is moving from the Restricted Settings area to the ordinary settings area. In future, CSCs turn on this setting for clients without SE having to get involved. Originally it was envisioned that clients would sign a waiver or consent form in order to have the less restrictive setting for HTML turned on. However, Kenexa had to turn it on for almost all clients in the beginning because when they edited their gateways they would get errors. So we never enforced the consent form. Recently it was decided that since this has been going on awhile, we'd abandon trying to get clients to sign something. Instead we will have clients review a simply stated document with their CSC and then have them give that document to their IT group to see if they are at risk. May be in a build later than Build 6.

10. LDP093 Social Source Integration Enhancements

WBSS: Created new "Integration 2" user type privilege category and moved existing CRM privileges under it. Also added new privileges to Integration 2 category. All social source privileges are under one function to control the dependencies and ease of configuration.

Moved from Integration to Integration 2

- **CRM - add/link Candidate to CRM** (**renamed** from CRM – copy candidate to CRM)

- **CRM – general search**

- **CRM – manage campaig**n (**split and renamed** from CRM – manage campaign/source from campaign)

- **CRM – source from campaig**n (**split and renamed** from CRM – manage campaign/source from campaign)

New Privileges Added to Integration 2

- **CRM - View Candidate in CRM**

- **CRM - Unlink Candidate from CRM**

See spec for additional information:

http://intappshare/EngMainSite/EngProj11/LDP093%20%20Enhancements%20To%20Social%20Source%20Integration/PROD%20MGMT/LDP093%20Workbench%20Changes%20Functional%20Spec.doc

Project expands candidate portal functionality to share documents with candidates who do not have TG profiles.

WBSS: Tools>TG>Text customization>Edit > Candidate Portal tab

Non TG applicants intro text – when this new text field contains customized text, this will display in the login page for all candidates without a TG profile.
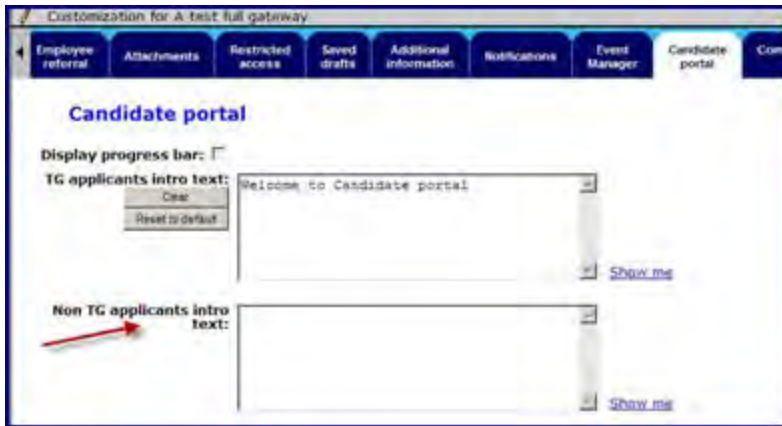
Enter detailed instructions to inform candidates how to log in to the created TG profile. Advise candidates based on the profile field selected for client settings "Candidate Portal – Username for Non TG applicants" and "Candidate Portal – Password for Non TG applicants." **If home phone, work phone, or zip code was selected there for Password**, instruct candidates to **enter only numbers for the password field** when logging in.

For example, Email was selected for Username and Home phone for the password, the text message should be similar to the following:

"To be able to login to your account, please enter your email address for User name and your Home phone number (Numbers only) for your Password."

May be build 13.0

For clients using conditional blurbs, the "View blurbs" screen will now display the Boolean condition statement that is stored for a multi-condition blurb so that it is available for copying and pasting.

For clients using pre-filtered document templates, the View document template screen will display the Boolean condition statement that is stored for pre-filtering one or more document templates so that it is available for copying and pasting.

Also, FYI we still (as of 11/9) do not have an answer to the question of whether this "Condition statement" will be shown also for the classic / single condition blurbs.

NOT in BUILD 6 – FUTURE BUILD TBD

Resume Extraction – Traditional Chinese, French Canadian	Resume extraction now available for Traditional Chinese and French Canadian Talent Gateways RDP563b

Resume extraction will now be supported for Talent Gateway and Agency Managers with Traditional Chinese or French Canadian locales. For candidates submitting resumes in those languages, extractable fields (contact info, education, experience) will automatically be extracted to the 2xB candidate profile.

Release 12.5, Build 5 Visible Changes

This section describes the 2x BrassRing visible changes in this build, proposed for release on November 3, 2011.

Cumulative documents with visible change information for previously released builds are available on the User Resource Center. See the Release 12.5 Resources section for R12.5 builds (cumulative from Build 0) and R12.4 builds (R12.4 Build 1 through 12.5 Build 0); see Release 12.3 Resources for R12.3 builds.

Summary of Visible Changes in this Build

Feature	Description	Page
New User Interface – Enhancements	Changes include active links for Employee Referral Status and Agency Name on Talent Record ribbon, and a new error message LDP090	23
Event Manager – Enhancements	View Candidate page in Event Manager will now display the language of the candidate LDP078	24
Post to My Social Networks – Enhancements	Enhancements: new sections for posting to multiple accounts and Company accounts, new Groups section, new client settings for maximum company and personal accounts. **New section for multiple personal accounts was included with the Build 4 notice in error; it became visible in Build 5**. 086	24
Job Code Filtering Enhancement	Filter job code page now provides the ability to view the filtered Job code results and refine criteria LDP084	28
Proximity Data Updates	Proximity Country, State/Province, and City data are being updated RDP572	29

1.   New User Interface – Enhancements

The following enhancements are visible with Build 5:

- Talent Record Ribbon – Employee Referral Status
  The existing ribbon field will now display as a link (to the Update referral status page) rather than plain text if the user has the appropriate privilege (Candidate Actions 2 > Referral status – update).

- Talent Record Ribbon – Agency Name
  The existing ribbon field will now display as a link (to the View Agency code details page) rather than plain text when present if the user has the appropriate privilege (Admin + > View agency code details).

- Error message on attempt to update Candidate HR Status when Req status changes (through Req Details page action only)
  If users update the status of a Req to Canceled, On hold, Closed, or Deleted while the Candidate Results panel is open, they cannot then update the candidate's status, either through the inline editor, advanced options or "Update Status" from the actions menu. The following error message will display in a pop-up (with OK button) and the status WILL NOT be updated:

HR Status could not be updated because the req status has been changed

2. Event Manager – Enhancement

As a first step towards better supporting communications to candidates of different languages, the View Candidate page in Event Manager will display the candidate's language.

3. Post to My Social Networks – Enhancements

Post to my Social Networks – Multiple Accounts changes were included in the Build 4 notification, but became effective as of Build 5, not Build 4. The description has been relocated here, and we apologize for any inconvenience.

The "Post to my Social Networks" page displays when 2xB users select an open req and click the "Post to my Social Networks" action link. The "Post to my Social Networks" page in 2xB has been modified for build 5. These changes are coming:

- New My accounts section allowing multiple personal accounts

- New Company accounts section

- New Groups section

- New client settings for maximum company and personal accounts

My Accounts

A new section on the "Post to my Social Networks" page allows users to post to more than one social media account. Once users add accounts, Profile pictures also display (in place of the Social Media icon hyperlinks previously shown on the page).

Users can add multiple accounts (up to 25, but 6 is the maximum recommended) by clicking the corresponding Social Media icon provided in the new section. Clicking the link takes users to the appropriate authorization page.

Users can also delete accounts using the new checkbox and delete icon (trashcan). The checkbox will be checked by default and upon mouse-over, a tool-tip displays with text "Select/Deselect all." Upon mouse-over of the delete icon, a tool-tip displays with text "Revoke selected

Company Accounts

The "Post to my Social Networks" page will include a new "Company accounts" section for users with new user type privilege (set in Workbench Self-Service for accounts with Social Media Integration).

- Reqs 2 > "Social Networks -Authorize Company accounts"
  When enabled, user will be able to authorize company's Social Media accounts for job posting.

- Reqs 2 > "Social Networks – Post to Company accounts"
  When enabled, user will be able to post the jobs to the company's Social Media accounts that were already authorized to share.

Users with both privileges see a page similar to the following when posting to social networks. Users without the privilege to authorize company accounts do not see the "Add" portion or trashcan icon for deleting an account (circled in yellow). Users with neither privilege don't see the "My Accounts" section, so until privileges are set, this will not be a visible change.

Note: The Company accounts feature does not apply to LinkedIn.
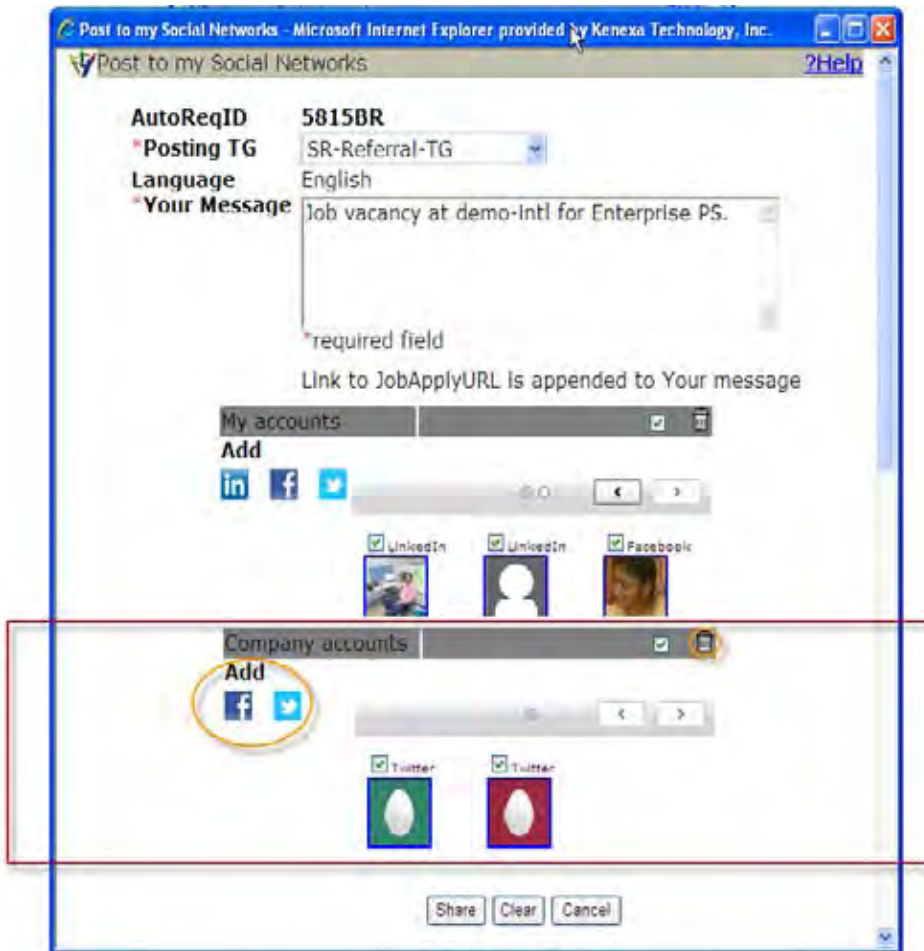
Groups Section

A new "Groups" section that can be enabled on the page will allow users to post reqs to groups on Social Media sites. This functionality requires the new "Enable Social Media Integration – post to Groups" client setting be set for your account.

Once the client setting is enabled, all the groups, of which the authorized personal Social Media accounts are members and have the privilege to post, will be displayed in the Groups section for selection, similar to the following figure. Users cannot delete a group, so no trashcan icon is present in the section. The checkbox functions as in the other sections; if unchecked, all the checkboxes associated with the groups will be unchecked and the user will not be able to post to any of the Groups.
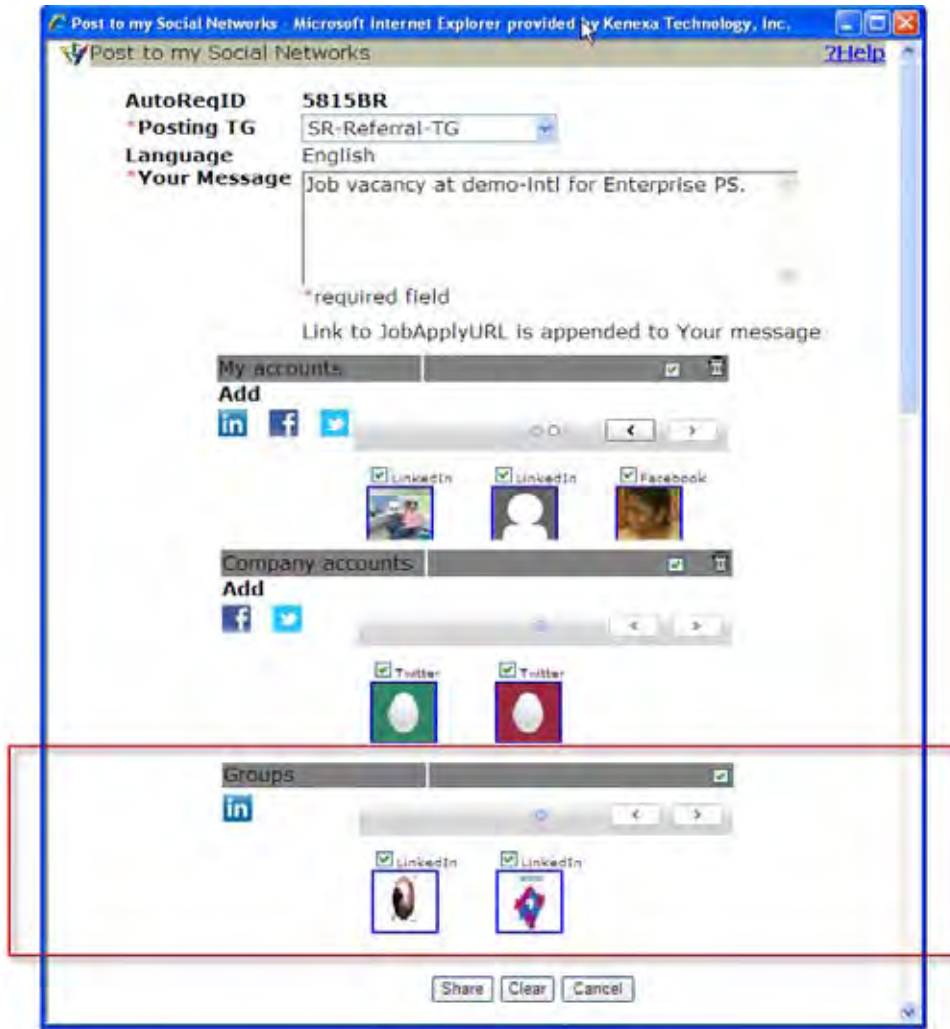
Client Settings for Maximum Accounts

Appropriately-privileged users can add up to 25 accounts, depending on two new client settings:

- Enable Social Media Integration – maximum allowed company accounts (1-25)

- Enable Social Media Integration – maximum allowed personal accounts (1-25).

The maximum recommended is 6. Users click the corresponding Social Media icon provided in the new section. Clicking the link takes users to the appropriate authorization page.

Before the Build 5 changes

Only one account per social media site was allowed, with no profile picture display.
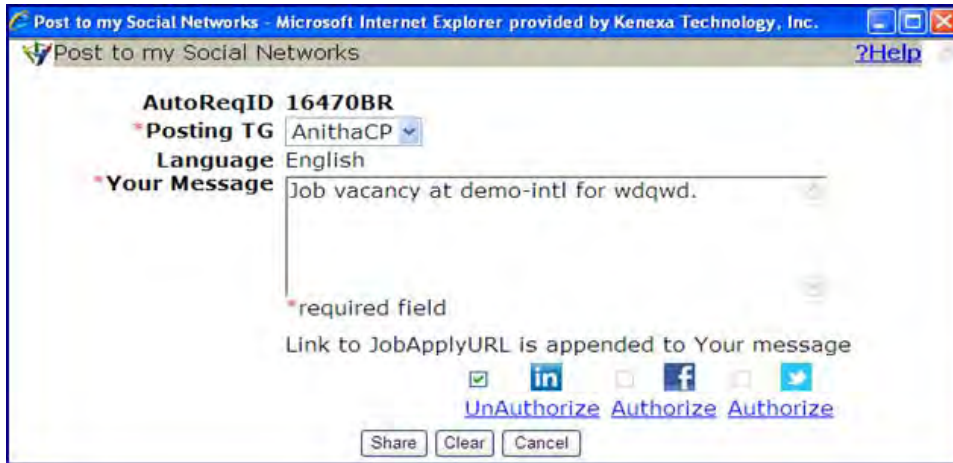
4. Job Code Filtering Enhancement

The job code filtering enhancement is visible for accounts with the client setting: "Job Code Filter" set to Yes. The page where users select job code filter criteria when adding a req in 2xB now provides the ability to view the filtered job code results, adjust the filter criteria, and select the desired job code, all in the same page.

The path to the new page is Reqs > Add new req > Select req form > Select job code > Filter job code. The resulting "Filter job code" page includes a new "Filter Results" section below the "Filter Criteria" section.
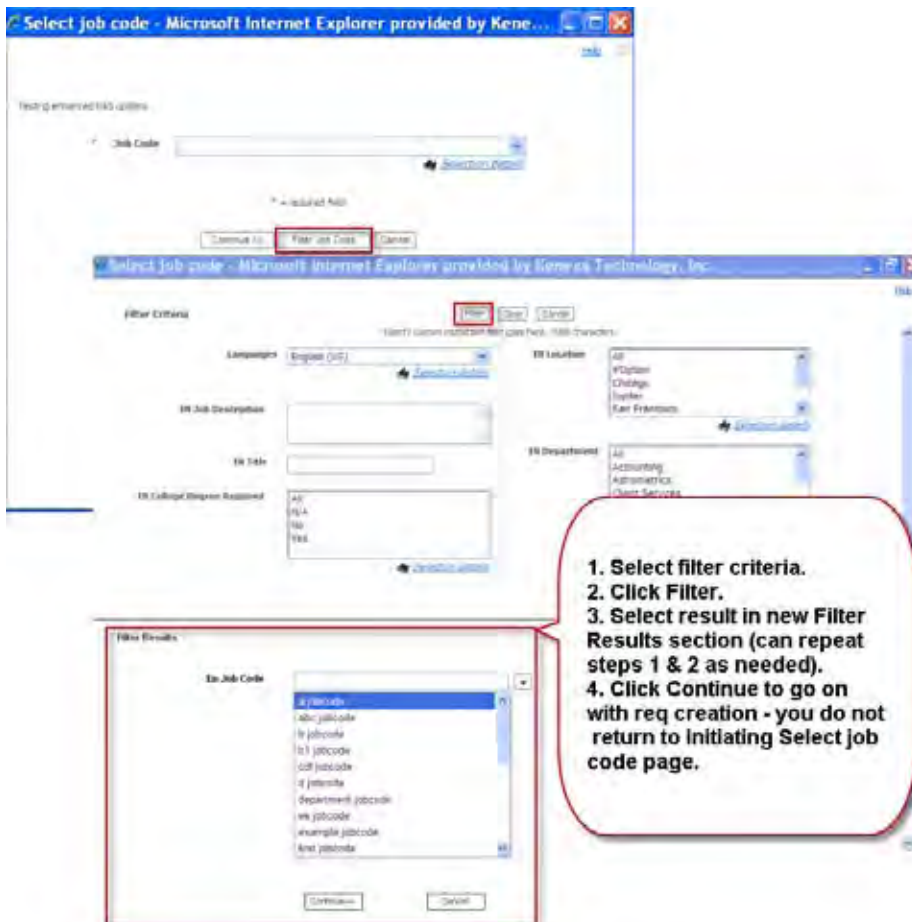
Users set the criteria and click **Filter** in the top portion of the page. Results are shown in the new **Filter Results** section. The Job Code box in the results section has auto-filter capability, allowing additional results list refinement. Users make their selection there (or can reset criteria and filter again if necessary to find the desired job code). After selecting the job code, they click Continue to proceed in the Req creation workflow, without returning to the initiating "Select Job Code" page (that page, where users begin the filtering process by clicking the Filter Job Code button, is unchanged).

5. Proximity Data Updates

Country, State/Province, and City data is being updated for proximity searching. New data includes 11 countries (departments, territories, and territorial collectivities), which include:

French Guiana, French Polynesia, French Southern and Antarctic Lands, Guadeloupe, Martinique, Mayotte, New Caledonia, Reunion, Saint Pierre and Miquelon, Wallis and Futuna.

Over 800 states and provinces have also been added, for countries ranging from Afghanistan to Zambia, as well as their associated cities.

Notes for Internal Kenexa

The following features to be announced in the next major release have no visible changes in this build for 2xB without configuration, but may have visible configuration changes in Workbench Self-Service (noted below where applicable). Full enablement on these features will be available with the next release.

6. RDP351 Integration to 2xO Pt3

Research only.

7. RDP492 Background Check Tool Validation – A-Check

No impact, common services tool validation.

8. RDP520 'Deep Links' Capability for Search Agent Email Job Links and Search API Links

Extends the deep links functionality in two scenarios:

- Allow legitimate system users to be automatically authenticated into an internal Talent Gateway upon clicking a job link in a Search Agent email that the system user has set up.

- Allow the client use the 'SSO Talent Gateway Login URL' to build the 'canned' job searches and embed deep links in e-mail communications and on internal pages to the Search results page.

WBSS Visible change: New options for "SSO Talent Gateway" and "Enable SSO Talent Gateway Login for:" in Tools > Talent Gateways > Admin > click 'Add Talent Gateway in Actions menu | click 'edit' icon for specific Talent Gateway > Talent Gateway details page.

See spec for additional information:

http://intappshare/EngMainSite/EngProj11/RDP520%20%20Deep%20Links/RDP520%20C686%20Functional%20Spec%20DeepLinks.doc
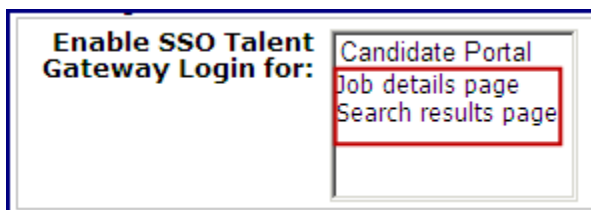
9. RDP522 Candidate Experience – Welsh

Presumably making Welsh available for TGs – no spec or other documents available on the project site.

10. RDP536 Candidate Forms – "View – my reqs" form level privilege

WB: new "View – my reqs" form level setting (**Tools > Forms > Candidate forms > Edit form attributes**).

Currently candidate form-level privileges control who can view an existing form -- either the form creator (Add/view/modify my) or specifically-designated user type(s) ('View All'). If a user type has access to 'View All', the users of that user type can view ANY form using that form template. A new form-level privilege controls what user types have access to view the form if they have a 'my req' relationship with the candidate. This allows members of a req team to have the privilege to view forms for candidates for which they have a 'my reqs' relationship, without having the "view all" privilege.

The privilege restricts viewing or eLinking of a / req candidate form (single/candidate/req & multiple/candidate/req) from Forms table to only those users with a 'my' relationship to the associated req (user is req creator, recruiter, hiring manager or selected as member of req team).

See spec for additional information:

http://intappshare/EngMainSite/EngProj11/RDP536%20%20Improve%20Form%20Security%20C798/RDP536-View-my%20reqs%20-%20FUNC%20SPEC.docx

11. RDP558 Tie Multiple Ethnicities into Categories & Candidate Counts in EEOC Panel

Currently, recruiters are able to see the EEOC Panel but not the breakdown of the Ethnicity Categories. Project will support multiple candidate form field options selection (with some restrictions) in the "Candidate Form Field Configuration" section of the config page for Report subpanel type of the new Custom Subpanel.

WBSS: Requires configuration for all 2xB users with "Custom Subpanel – Report" if multiple Candidate Form Field options have been selected in the "Candidate Form Field Configuration" section of this page (Tools>Settings>Panel Configuration>Administer Custom Subpanel>Add/Edit Configuration>Report Subpanel type).
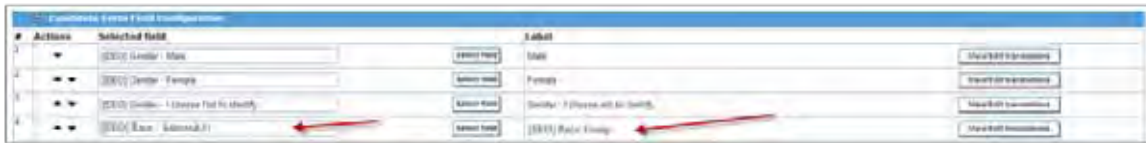
The field selection pop up (when the "Select field" for any row in the Candidate Form Field Configuration section) window will now support multiple selection (Tools>Settings>Panel Configuration>Administer Custom Subpanel>Add/Edit Configuration>Report Subpanel type>Select field).

See spec for additional information:

http://intappshare/EngMainSite/EngProj11/RDP558%20%20Tie%20multiple%20Ethnicities%20into%20Categories/RDP558-Functional_spec_for_Tie_multiple_Ethnicities_into_Categories_and_Candidate_Counts_in_EEOC_Panel_Build5.docx

12. RDP571 DIT – Researching Standard Report Templates

Still in research phase – no spec or other documents available on the project site.

13. RDP581 Background Check Tool Validation (Asurint)

Slipped from Build 4. Backend validation of common services BGC provider.

14. LDP031 **Configurability of Companion Products**

<mark>To be Delivered Build 6</mark>

Overall project moves the configurability of companion products:

- Mobile Recruiter,
- Smart Approval
- Event manager
- Community Gateway

The current configuration utility for the Companion Products is Navigator. Navigator configuration moves to Workbench (this is for Tech services users and Super users – no WB clients have access). Note that adding users is done via WB Administer 2xB users.

Workbench
 	
Tools ⌄
Forms ▸
Import ▸
Users ▸
Tracking logic ▸
Talent Gateways ▸
Gateway Questionnaires
Agency Managers ▸
Settings ▸
Task manager
Integrations ▸
Automation Manager ▸
Remote Recruiter
Smart Approval
Community Gateway ▸
	The Companion Products will now be available in Workbench under the "Tools" category
	
	Companion Products
	
	    Ø Mobile Recruiter
	
	    Ø Smart Approval
	
	    Ø Event manager(No separate section)
	
	    Ø Community Gateway
	
	 • There will be no functionality changes to the Companion Products
	
	 • All client settings associated with the Companion Products will still need to be enabled
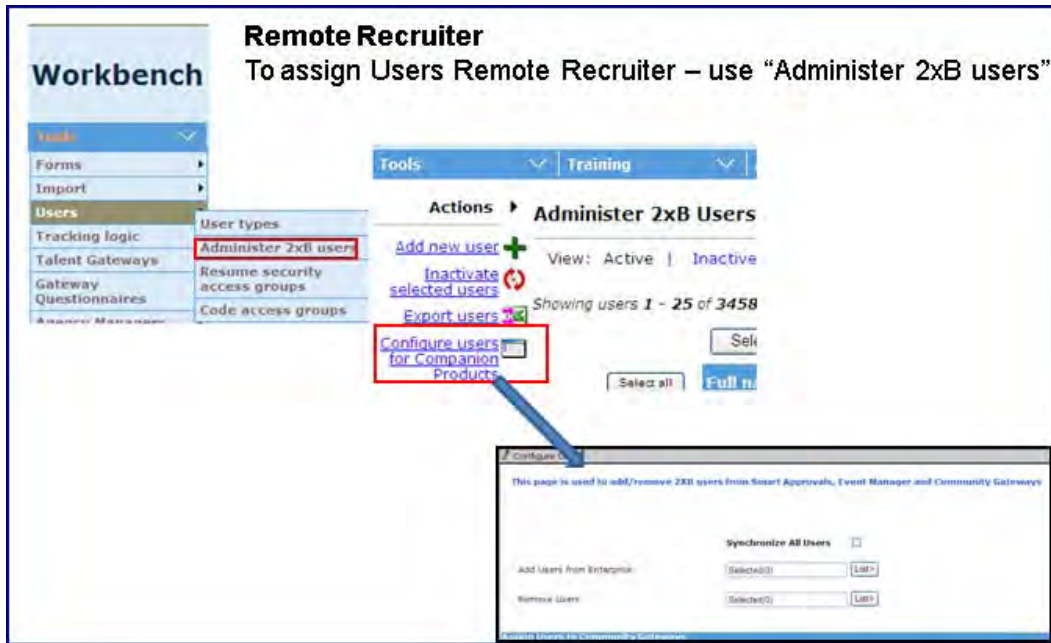
See the enablement slides for details:

http://www.kenexanet.com/sites/plp/2xB13/Shared%20Documents/Enablement%20Slides/LDP03 1-Workbench%20Companion%20Product%20Configuration.pptx

15. LDP062 Expansion of Portal for non-direct Applications

For candidates in 2xB without TG profiles, project provides candidate portal functionality to share documents with these candidates. Solution aids in getting logins to candidates, encourages the candidates to create TG profiles in order to use the candidate portal features.

WB New client settings: "Candidate Portal – Username for Non TG applicants" and "Candidate Portal – Password for Non TG applicants". If profile fields have been selected for these new client settings, a TG profile will be created based on these configurations for those candidates without a TG profile, upon Posting to portal.

See spec for additional information:

http://intappshare/EngMainSite/EngProj11/LDP062%20%20Expansion%20of%20Portal%20for% 20NonDirect%20Applicat/PROD%20MGMT/LDP062- Functional_spec_for_Expansion_of_portal_for_non-direct_applications.docx

16. LDP064 Doc Generator – Showing Relationships Between Tokens, Blurbs & Docs

Users desire capability to determine quickly how content changes to a blurb, token, or template will affect the content of other blurbs, tokens, and templates. This project will provide a mechanism for reviewing the impact of these types of changes from several views.

WBSS: Visibility is controlled by a user type privilege, Communications > 'Relationship views – templates, blurbs, and fields'

When the new user type privilege is checked for a user type, user will be able to see a new menu item called View relationships" in the 2xB Communications menu.

Functionality for LDP to be complete Rel 13.0. See specs for additional information:

Release 12.5, Build 4 Visible Changes

This section describes the 2x BrassRing visible changes in this build, proposed for release on October 13, 2011.

Cumulative documents with visible change information for previously released builds are available on the User Resource Center. See the Release 12.5 Resources section for R12.5 builds (cumulative from Build 0) and R12.4 builds (R12.4 Build 1 through 12.5 Build 0); see Release 12.3 Resources for R12.3 builds.

Summary of Visible Changes in this Build

Feature	Description	Page
New User Interface – Enhancements	Enhancements include availability of Req template field for Req panels, and new Referral Type link options on the Talent Record ribbon LDP090	34
Posting Dependencies – Update newly selected/unselected postings only	Button will now save updates to "Days until posted " or "Days to remain posted" for *currently-selected* TGs/AMs (as well as newly-selected) RDP508	35
Post to Social Networks – Talent Gateway Setting	New TG setting controls whether the "Post to my Social Networks" button is displayed for candidates, de-coupling functionality from candidates' ability to import profiles from social media RDP583	35
Post to my Social Networks – Multiple Accounts	**Correction: This was a change for Build 5** – the description has been moved to that notice LDP086	
Communications – User Signature Merge Token	Clients can continue to import or upload .GIF files of user signatures and can now use two new merge tokens representing the image of the user signature in blurbs, document templates, and email templates RDP539	37
Data Insight Tool – "last edited" Date Filters	**Correction for Build 3 item:** Candidate record information can now be filtered by date last edited. In the original notice, the Output Selection Tool figure showed incorrect sort order for some fields unrelated to this visible change. The correct order is reflected below. RDP568	39
Event Manager – Enhancements	Enhancements include: additional actions create internal event forms, Save to Single Event or Save to Series functions automatically build event schedule, and new "Event Change Notifications" system setting LDP078	39
Business Analytics – Qlikview Upgrade	With the upgrade to Version 10 SR 2, the Help pop-up will have minor changes and QlikView toolbar will be replaced with Clear", "Back", "Forward" and "Export to PDF" buttons RDP544	40

1. New User Interface – Enhancements

The following enhancements are visible with Build 4:

- Req template panel standard field is now available for panel configuration and Edit Columns for all Req Panels

- New Referral Type link options on the Talent Record ribbon provide additional referral information.

Req Template Field

A new panel standard field, Req Template, will now be available for selection in Workbench Self-Service for all existing and new Req Panel configurations (My and All Open Reqs, My and All Reqs Pending Approval). Certified Workbench users can configure it in **Tools > Settings > Panel Configuration > Any Req Panel Config > Administer configuration > Add new | Edit** [selected] > Select field.

2xB users with privileges to Edit Columns will see the new standard field "[Req fields (standard)] Req Template" displayed in the "Available" fields box when they select "Edit Columns" from the "Display" menu on any Req Panel.
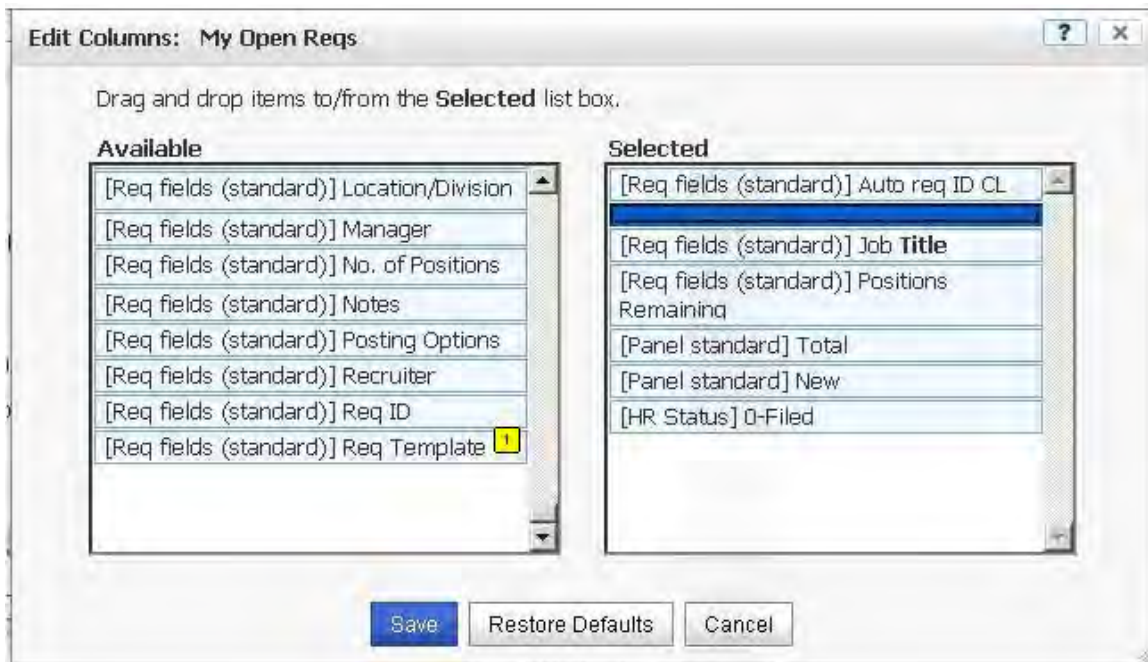
Referral Type

Additional options for the **Referral type** Ribbon field in the new Talent Record include new links to existing Agency or Employee Referral pages:

- Agency - other req
  Displays if an active agency association at a per-req level exists for a different Req than the one being viewed - including viewing the candidate from outside a Req folder (search results, candidates in queue, etc.)

- Agency - expired/removed
  Displays if an agency association at the per-candidate level or per-req level ever existed and was expired or removed. In cases where both "other req referral" AND "expired/removed referral" would apply, "Agency – other req" will display, but the expired information will display on the Agency pop up page.

- Employee - other req
  Displays if the candidate has been submitted for a req other than the req being viewed (or if the req is being viewed outside a folder and there is no general submission). In cases where the Candidate has BOTH a req specific referral, and a general referral – the req specific information will have precedence and "Employee – other req" will display.

2. Posting Dependencies – Update newly selected/unselected postings only Function

Revised "Save" functionality for "Update newly selected/unselected postings only" button (on the **Edit Posting Options** page in 2xB) will be a visible change when users edit the "Days until posted" or "Days to remain posted" fields. (This button is only visible for sites with client setting "Suppress enhanced posting options" set to **No**.)

The Save functionality for "Update newly selected/unselected postings only" was revised to save changes based on selection / de-selection of Talent Gateways or Agency Managers *as well as* any change to Days until posted" or "Days to remain posted" values. This ensures that the on-screen validation of posting dependencies is respected upon saving. Thus, when a user edits the "Days until posted" or "Days to remain posted" values for newly-selected or currently-selected TGs or AMs and clicks **Update newly selected/unselected postings only**, posting dependencies will be validated and the selected TGs/AMs will be updated.

- If validation fails due to posting dependency violations, 2xB displays a warning message so that the user can correct the dependent gateways. A sample message is:
  "Please correct the following: The Days until posted for *dependent_gateway_name* Talent Gateway cannot be greater than the days until posted for *gateway_name* Talent Gateway."

- The user should select and edit the gateways listed in the message and click **Update newly selected/unselected postings only** again to save all changes.

Before this change

Previously, when a user edited the "Days until…" or "Days to remain…" values and selected **Update selected/unselected postings only**, the postings for the selected Talent Gateways were updated with changes *only for those TGs/AMs that were newly selected or un-selected*. The page would appear to save for any edited TGs/AMs, but "Days" field edits were ignored unless accompanied by selection/de-selection of the TG/AM.

3. Post to my Social Networks – Talent Gateway Setting

Currently, when the social media setting for a Talent Gateway (TG) is enabled:

- Candidates can post to their social networks using the "Post to my Social Networks" button that is visible on the Job details page when they are viewing/applying to a req

- Candidates can use their social network profile to apply (this is not changing in any way).

This feature "de-couples" the options. It allows the import of profiles from social media, and adds a new TG setting, "**Social media integration for Job Details page**," that controls whether the "Post to my Social Networks" button is displayed.

Clients who want the Post to my Social Networks button accessible for candidates viewing job details must enable the button, per gateway. This setting will be available for editing only if at least one Social Media site is selected for the TG **Social Media Integration** value.

Tools > Talent Gateways > Admin > Add/Edit [selected Talent Gateway]
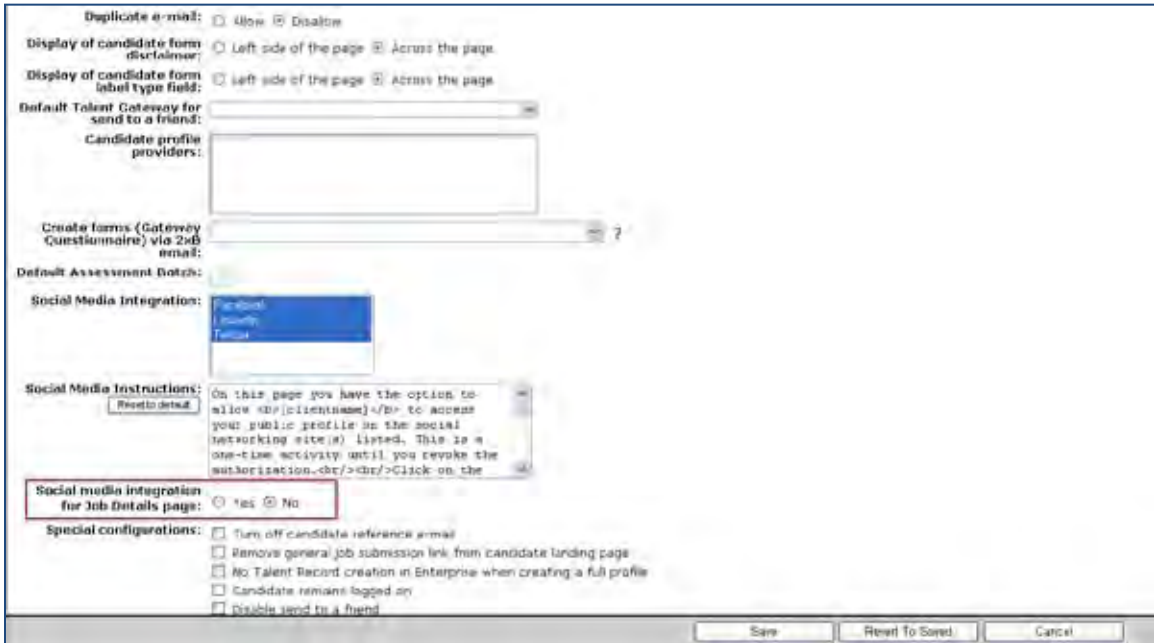
When set to No, the button is not displayed.

When set to Yes, the button will be visible to candidates, as shown in the following figure (this was the behavior *before this change*).

4. Communications – User Signature Merge Token

The Recruiter picture signature functionality has been enhanced, affecting clients with the client setting "Recruiter picture signature token" enabled. The client setting is now called "Recruiter / User signature image tokens" to reflect the expanded usage.

Clients can continue to import or upload .GIF files of user signatures and can now use two new merge tokens representing the image of the user signature in blurbs, document templates, and email templates.

- In Workbench Self-Service, users will see a new user type privilege (Tools > Users > User types > Edit type permissions > Admin) called **Edit my account – disable 'Recruiter / User signature image'**. The purpose of this privilege is as follows: If clients turn on the client setting 'Recruiter / User signature image tokens', and they also allow individual users to edit their own accounts ("Admin" privilege, 'Edit my account', is enabled), clients can use this new privilege to restrict signature image administration to 2xB administrators. The new privilege is disabled and grayed out until 'Recruiter / User signature image token' client setting is enabled AND 'Edit my account' user type privilege is checked.

- In Workbench, the "Recruiter Picture" setting had been renamed to "Recruiter / User signature image."

The functionality continues to support the Req token =get name used in Letter templates only.

Changes in 2xB

- In **2xB > Admin > Admin+ > Users > Add new user/Edit** [selected user], "Recruiter Picture" has been renamed to "Recruiter / User signature image".

- In **2xB > Admin > Edit my account**, "Recruiter Picture" has been renamed to "Recruiter / User signature image". Individual users will see the Edit my account page if the client has enabled the "Admin" privilege "Edit my account" for a user's user type.

- Users with privileges to administer blurbs and/or document templates, and/or email templates will see a new merge field in the "User profile" variable group called "User signature image" in:
  Admin > Communications >Add email template | Email templates > Edit [selected template]
  Admin > Communications >Add document template | Document templates > Edit [selected template]
  Admin > Communications >Add blurb | Blurbs > Edit [selected blurb]

- For the "Add additional user information" feature ("Enable additional user information merge fields" client setting must be set to "Yes"), users with privileges to administer blurbs, document templates, or email templates will see a new merge field in the "Add additional user information" pop-up window called "User signature image" if they explicitly select a candidate form field of the single-select, query-select type that pulls from a list of users. Form type has to be single per candidate or single per candidate per req. RDP539

5. Data Insight Tool – "Last edited" Date Fields

For candidate record information as of Build 3, Data Insight Tool users are able to report on these fields in the Candidate > System Information category:

- Date last edited

- Date last edited by candidate

The new fields are available in Filter, Security User Role and Output Worksheets (**Reports > Data Insight Tool > Manage templates > Create new template| Edit template** and **Reports > Data Insight Tool > Manage users and roles**).

Correction: In the original notice, the Output Selection Tool figure showed incorrect sort order for some fields unrelated to this visible change. The correct order is reflected below.

Template Workshop

Output Selection Tool
Select up to 75 fields to add to the Output Worksheet. To [...]
Selection Tool, click the **Filters Worksheet**.
- Candidate
  - Contact Info
  - System Information
    - ☐ Added on
    - ☐ BRUID
    - ☐ Candidate ref num
    - ☐ Candidate stacking field
    - ☐ Last codes
    - ☐ Date last loaded
    - ☐ Viewed by Current User
    - ☐ Viewed by Any User
    - ☐ Viewed By
    - ☐ Viewed On
    - ☐ Date last edited by candidate
    - ☐ Date last edited
  - Notes

Template Workshop

Filter Selection Tool
Select up to 10 filters to add to the Filters Workshe[...]
the Output Selection Tool, click the **Output Works**[...]
- Candidate
  - Contact Info
  - System Information
    - ☐ Added on
    - ☐ Candidate ref num
    - ☐ Last codes
    - ☐ Date last loaded
    - ☐ Viewed by Current User
    - ☐ Viewed by Any User
    - ☐ Viewed By
    - ☐ Viewed On
    - ☐ Date last edited by candidate
    - ☐ Date last edited
  - Notes
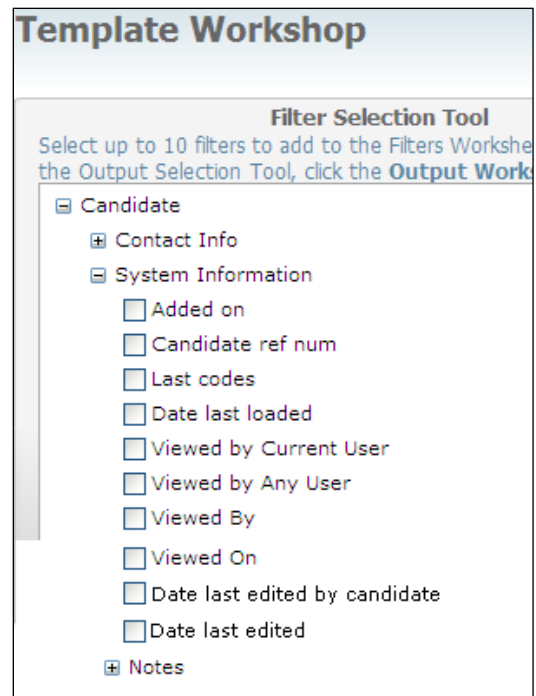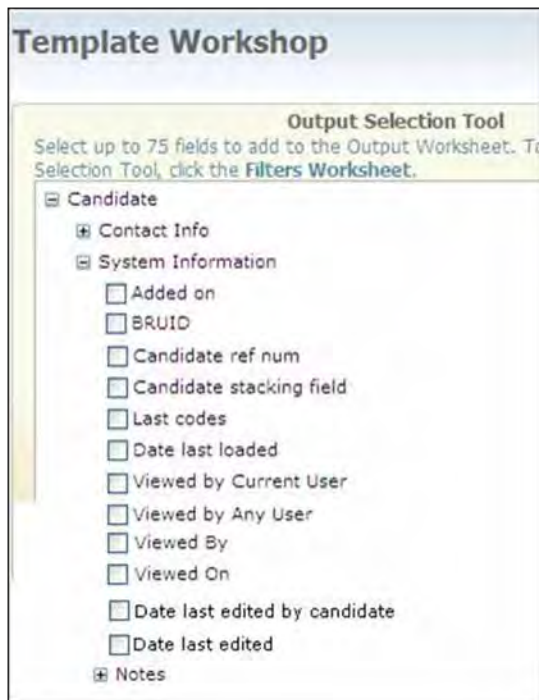
6. Event Manager – Enhancements

Several enhancements have been made, including the following:

- Clients currently using the internal event form feature will notice that internal event forms will now also be created for candidates who are scheduled for events by Event Manager users through the Event Roster actions move, copy, send to Event Manager, or reschedule. Previously, internal event forms were only created for candidates who scheduled themselves for events, so candidates who were scheduled by an Event Manager user were missing the forms.

- All clients will notice that when they click the Save to Single Event or Save to Series buttons on the event configuration page, the event schedule will build automatically. Generally, the schedule build will be instantaneous. If not (the time required to complete the schedule build becomes noticeable to the user), a pop-up window indicates that the schedule build is in progress. When the schedule build has completed, the user sees a summary of the number of errors and/or warnings generated. The user can see the schedule details by clicking View Schedule, or save and close the event configuration page.

- Within the Event Manager Admin area, a new system setting has been added to the System Notifications page called "Event Change Notifications." When enabled, users have the opportunity to send emails to all scheduled assessors and/or candidates when changes are saved to events. The option to "Notify Participants" becomes a third choice in addition to View Schedule and Close when an event schedule is built after clicking Save to Single Event on the event configuration page. When "Notify Participants" is selected, users can configure a message to be sent to all scheduled assessors and a separate message to be sent to all scheduled candidates.

7. Business Analytics – Qlikview Upgrade

Qlikview is being upgraded to Version 10 SR 2. Since this is related to an upgrade, these changes will be visible in 2xB Business Analytics after the maintenance weekend following Build 4.

- The QlikView Toolbar has been replaced with the buttons as shown below for "Clear," "Back," "Forward," and "Export to PDF" functionality.

- Columns in the data tables (at the bottom of each Business Analytics page) can now be moved through drag and drop functionality.

- The pop- up displayed when users click the Help icon on the chart and table is changed with the new version. It looks similar to the example below, and no longer displays an "OK" button.
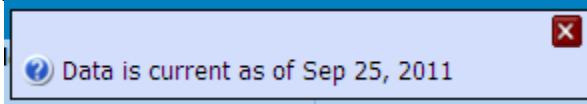
- The maximize button (circled below on a view of the previous version) has been removed in the new version.
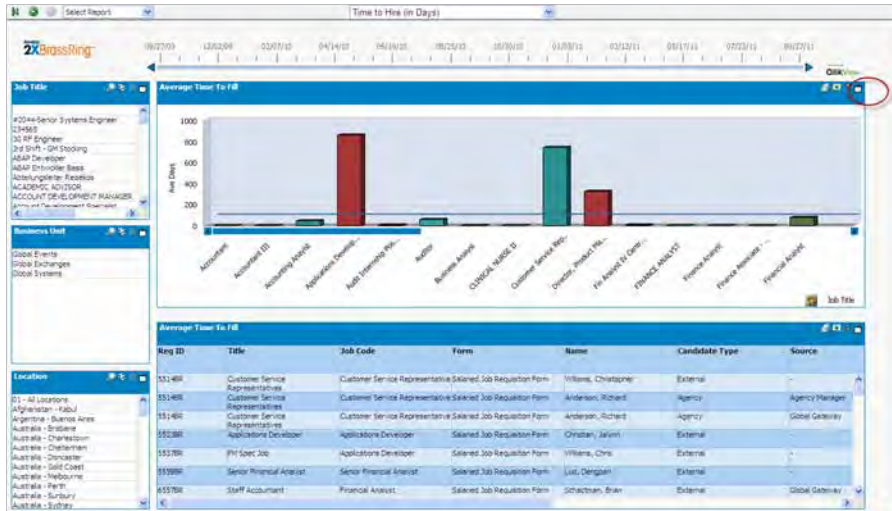
Notes for Internal Kenexa

The following features to be announced in the next major release have no visible changes in this build for 2xB without configuration, but may have visible configuration changes in Workbench Self-Service (noted below where applicable). Full enablement on these features will be available with the next release.

8. RDP538 Approvals – Enable Abridged Req View

Feature provides capability to display a shorter view of the Req to approvers. When the approvers having the abridged view feature enabled receive Reqs that were configured for the abridged view via an eLink, they will be able to view the Reqs in an abridged form.

Workbench Self-Service changes:

- New attribute "Enable abridged Req view" on the "Edit approval group" page (Tools>Forms>Approvals>Edit approval group) to enable the approval group with an abridged view of the Req.

- New "Define Approval abridged view" action in the "Administer custom fields" page (Tools>Forms>Reqs>Req Forms>Administer req fields) to configure the custom Req fields for the selected Req template.

See spec for additional information:

http://intappshare/EngMainSite/EngProj11/RDP538%20%20Use%20abridged%20req%20view%20for%20approval%20C799/RDP538_Use%20abridged%20req%20view%20for%20approval_FunctionalSpec_C799.docx

9. RDP545 JCDD Posting Event Batch Support

With the new Event Manager functionality, JCDD Posting will support the ability to default the event batch to avoid unnecessary user selection for both XLS and XML import (**Tools > Imports > Profiles > Add/Edit/Launch**, **Tools > Reqs > Req Forms > Administer req fields > Export job code posting defaults to Excel**). See Implementation plan for additional information:

http://intappshare/EngMainSite/EngProj11/RDP545%20%20JCDD%20Posting%20%20Event%20batch%20support%20XLS%20and/RDP545%20-%20JCDD%20Posting%20-%20Event%20batch%20support%20XLS%20and%20XML%20-%20%20WB%20Implementation%20plan.docx

10. RDP551 Add SSO Compatible link to Candidate Portal merge link

SSO clients interested in using the Candidate Portal functionality need this link SSO-enabled for their Internal gateway.

Workbench Self-Service (Tools -> Talent Gateways -> Admin-> Add/Edit Talent Gateway):

* New TG level attribute, "SSO Talent Gateway Login URL"

* New TG level setting, "Extend SSO Talent Gateway Login for".
  If the TG level setting, "Extend SSO Talent Gateway Login for" is checked for Candidate Portal, then the SSO Login URL provided in "SSO Talent Gateway Login URL" is used for logging in & authentication.

The URL that the client clicks will remain the same (so no 2xB changes). See spec for additional information:

http://intappshare/EngMainSite/EngProj11/Add%20SSO%20Compatible%20link%20to%20Candidate%20Portal%20merge/RDP551-Functional%20Spec.docx

11. RDP566 Assessment Versioning

An existing automated synchronization process occurs between KAS and 2xB to populate a client's list of available assessments. At times, KAS will make minor modifications to an existing assessment that require a new ID for the updated assessment. Because 2xB does not recognize that the new ID is equivalent to the old ID, 2xB prompts the candidate to take the assessment again. (2xB should consider candidate results tied to the old ID still valid for future use; but this occurs because there is no tie between the two ID "versions" of the assessment. To rectify this, we're enhancing the assessment synchronization process on the 2xB side, to create versioning logic when the assessment titles match but the ID does not.

There are no configuration settings for this enhancement, it will be an update to an existing stored procedure. See spec for additional information:

http://intappshare/EngMainSite/EngProj11/RDP556%20%20Assessment%20Versioning/RDP566%20Assessement%20Versioning%20Functional%20Spec.doc

12. RDP581 Background Check Tool Validation (Asurint)

Backend validation of common services BGC provider.

13. LDP031

Overall project moves the configurability of companion products:

* Mobile Recruiter,

* Smart Approval

- Event manager

- Community Gateway

The current configuration utility for the Companion Products is Navigator. Thus, for Build 4, Navigator configuration moves to Workbench (this is for Tech services users and Super users – no WB clients have access).

14. LDP062 Expansion of Portal for non-direct Applications

Project leverages the candidate portal functionality to share documents with candidates who do not have TG profiles.

Workbench

Two new Candidate Portal client settings, available when 'Candidate portal = Yes':

- "Candidate Portal – Username for Non TG applicants"

- "Candidate Portal – Password for Non TG applicants"

If profile fields have been selected for these new client settings, a TG profile will be created based on these configurations for those candidates without a TG profile, upon Posting to portal.

New Talent Gateway text customization setting in the Candidate portal tab, "Non TG applicants intro text." Existing "Sign in text" will be renamed as "TG applicants intro text."

Currently, users trying to post document portal for candidates that do not have a Talent Gateway profile see an error message. If the new candidate portal settings are configured, 2xB will instead allow documents to be posted to all Talent Gateways (the TG will be picked from the new WB setting "Candidate Portal – Non TG applicants". Upon Posting to portal the candidate profile will be created if this candidate does not have a TG profile.

See spec for additional information:

http://intappshare/EngMainSite/EngProj11/LDP062%20%20Expansion%20of%20Portal%20for%20NonDirect%20Applicat/PROD%20MGMT/LDP062-Functional_spec_for_Expansion_of_portal_for_non-direct_applications.docx

Release 12.5, Build 3 Visible Changes

This section describes the 2x BrassRing visible changes in this build, proposed for release on September 22, 2011.

Cumulative documents with visible change information for previously released builds are available on the User Resource Center. See the Release 12.4 Resources section for R12.4 builds; see Release 12.3 Resources for R12.3 builds.

Summary of Visible Changes in this Build

Feature	Description	Page
Resume Extraction – Simplified Chinese	**CORRECTION:** Resume extraction for simplified Chinese is included in this build (not in Build 1 as previously stated). rdp563	45
Reqs – Displaying Template Name in UI	New section title bar displays the Req template name in "View Req" and "Edit Req" pages and related eLink pages LDP082	45
Talent Gateways – Relabeled Cancel Buttons	Cancel buttons are being relabeled Back where that is the applicable behavior for candidates in job application workflows RDP579	45
Gateway Questionnaires – Enabling Right-Clicks	The right-click context menu is being re-enabled so candidates can use it to paste resume text into text and textarea fields in GQs QC180247	47
Candidate Forms – Enhancements	Minor "look and feel enhancements" are being made to fonts and buttons	48
Data Insight Tool – Filtering on Auto-fill Fields	Auto-fill type fields can now be used as filters and for restricting/granting access to users in Data Insight RDP566	6
Data Insight Tool – "last edited" Date Filters	Candidate record information can now be filtered by date last edited	7
SmartApproval – Enhancement	New "Checkmark" opens the "Approval View" for approving/declining LDP051	8
Event Manager – Enhancements	Enhancements include: Req ID and Job Titles associated with candidates in Event Manager will now display on candidate listing page; message tokens will now have tool tips; message templates can now be categorized to better manage the message template drop down lists throughout the product) LDP078	9
Proximity Search – Refreshed City Lists	City lists have been updated for proximity searching RDP578	10

Community Gateway – Passive Source Changes	Monster will no longer be supported as part of the Community Gateway Passive Source feature 89910	11

1. Talent Gateway and Agency Manager – Resume Extraction – Simplified Chinese RDP563

Resume extraction will be supported for Talent Gateway and Agency Managers with Simplified Chinese locale as of this build (Build 3). For candidates submitting resumes in Simplified Chinese, extractable fields (contact info, education, experience) will automatically be extracted to the 2xB candidate profile.

Previously, we reported erroneously that resume extraction for simplified Chinese would be available in Build 1. This was delayed, and we apologize for the inconvenience.

2. Reqs – Displaying Template Name in UI   LDP082

A new section title bar will display the Req template name in "View Req" and "Edit Req" pages.
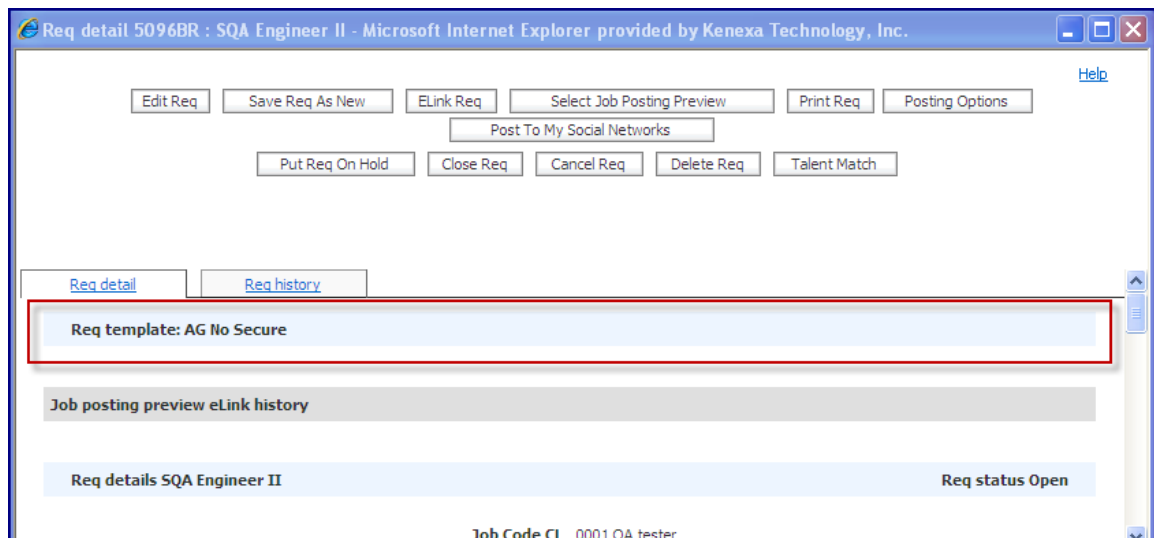
The req template name will also be displayed in those pages related to eLinks. Recipients will see the template name when they open an eLink to:

- View a req
- Edit a req
- Notify upon approvals (resembles the View req screen)

The ability to add Req Template as a column in the Req Panels in the new UI will be coming with the next build (Build 4). Additional information can be found in the visible changes notification for that build when it is available.

3. Talent Gateways – "Cancel" Buttons Relabeled "Back" RDP579

On Talent Gateways, "Cancel" buttons can sometimes behave more like a Back button: instead of enabling the candidate to suspend the application process and return to the results page, Cancel returns control to the previous section of the TG's job application process. For a more consistent experience for candidates, "Cancel" is being relabeled "Back" where that is the applicable behavior for candidates in job application workflows. The change will occur in the following workflows:

- Resume/CV profile information page – Contact Information Tab
- Resume/CV profile information page – Work Experience Tab
- Resume/CV profile information page – Education Tab
- Submit Resume/CV page – View Resume/CV mode
- Submit Attachments page
- Questions entry page – Questions entered in Talent-Gateway form of Candidate Forms
- Additional Information entry page – Forms filled per TG settings page

Resume/CV profile information page – Contact Information Tab

Resume/CV profile information page – Work Experience Tab

Resume/CV profile information page – Education Tab

Submit Resume/CV page – View Resume/CV mode

Submit Attachments page

Questions entry page – Questions entered in Talent-Gateway form of Candidate Forms
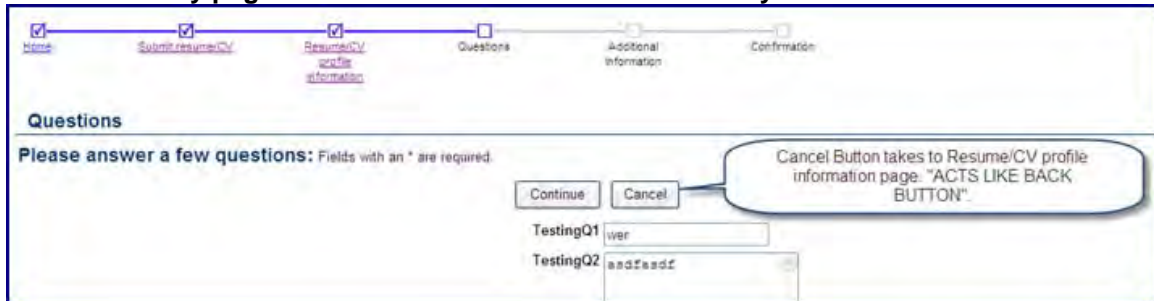
Additional Information entry page – Forms filled per TG settings page

4. Gateway Questionnaires – Enabling Right-Click Function 180247

The right-click context menu is being re-enabled so candidates can use it to paste resume text into text and textarea fields in GQs.

Currently from a Gateway Questionnaire (GQ), candidates cannot right-click to copy their resume text into a text box. This is because right-click context menus were intentionally disabled on GQs to prevent candidates from going "backwards" in the process and potentially breaking the workflow. Candidates are able to use copy and paste shortcut keys, Ctrl+C and Ctrl+V, but not all candidates are aware of this.

To address the issue, right-click context menus will be enabled for candidates to use in **text** and **textarea** fields of GQs (while remaining disabled where they could be used for "Back" functionality).

New Gateway Questionnaires (GQs) will get this automatically. Clients with existing GQs for which they want this change to be in effect *must re-render their GQs* (Save as New, activate the new GQ, update associations, inactivate the old one).

5. Candidate Forms – Enhancements

Candidate forms are being updated in Release 13 with some highly anticipated functionality changes for greater design flexibility, such as question branching, enhanced layout, and field association. The enhanced layout will allow clients to configure forms in multiple columns, control field label orientation (above/left of field input), and utilize different font styles and more.

In preparation for this project, the candidate forms pages (Add form, Edit form and View form) will be using more a more flexible and updated code and you will start to see some minor visible changes beginning with this build. These minor user interface updates will include things like incremental changes to field label font size, field input data font size, button font size, button size.

For Build 3 specifically, you may notice these changes on the Add form page (Edit form and View form will change similarly in Build 4):

- Slightly larger field label font

- Language toggle is also slightly bigger to match larger font

- Button appearance is subtly different

- Page text is aligned more to the left of center

- Options listbox showing the options (which can be up to 255 characters long) will expand only to 155 characters instead of the previous 255. You can click Selection details link to view the full option names.

These changes may be experienced differently based on browser and browser version.

There are NO FUNCTIONAL changes being made to the forms as of Release 12.5 Build 3.

6. Data Insight Tool – Filtering on Auto-fill Fields   RDP566

Auto-fill type fields are currently available for output in Data Insight, but have not been available for use as filters or for restricting or granting User Role access to users in Data Insight. With this build, all auto-fill fields in Candidate forms, Req Subsidiary forms, Req Addendum forms and Document Subsidiary forms will now display in the Filter Worksheet and the User Role Worksheet.

Before this change	**After this change**
Auto-fill fields did not appear in User Role selection tool or Filter selection tool.	Auto-fill fields will appear in User Role selection tool.
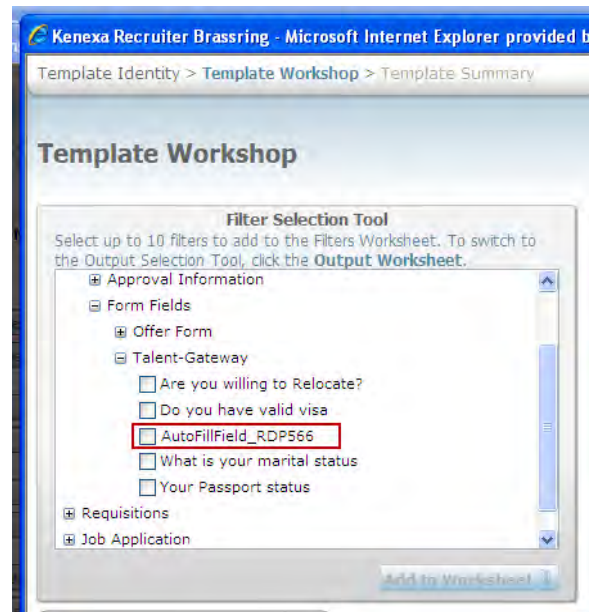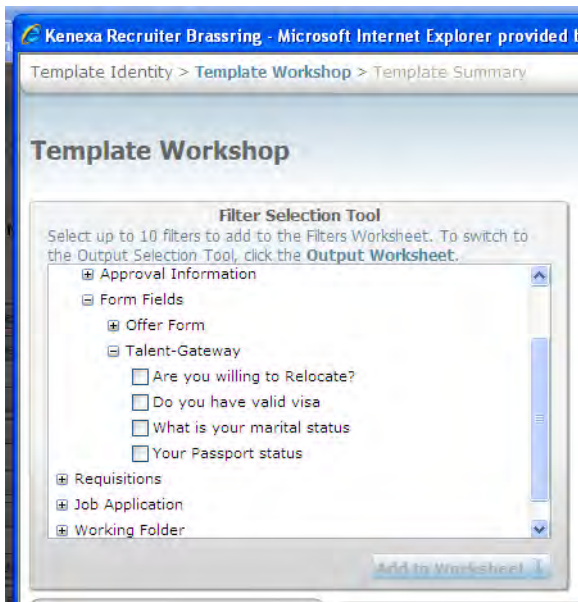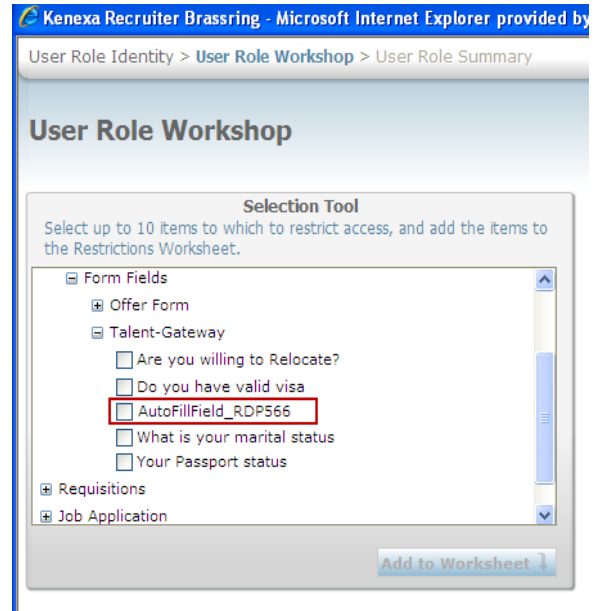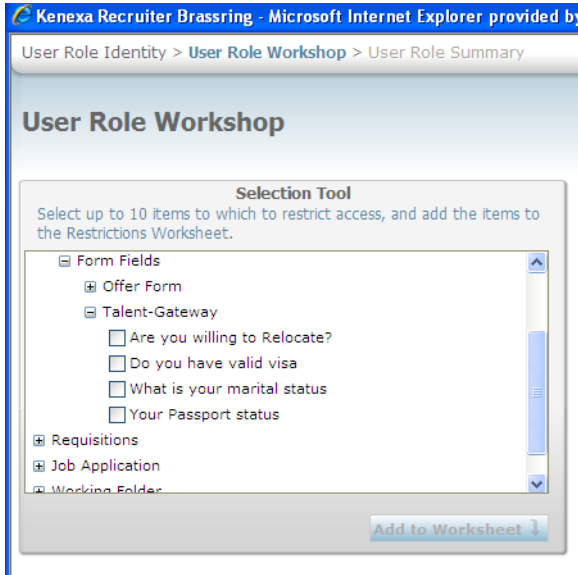
7. Data Insight Tool – "Last edited" Date Fields RDP568

For candidate record information, Data Insight Tool users will now be able to report on these fields in the Candidate > System Information category:

- Date last edited

- Date last edited by candidate

The new fields will be available in Filter, Security User Role and Output Worksheets (**Reports > Data Insight Tool > Manage templates > Create new template| Edit template** and **Reports > Data Insight Tool > Manage users and roles**).

Correction: In the original notice, the Output Selection Tool figure showed incorrect sort order for some fields unrelated to this visible change. The correct order is reflected below.
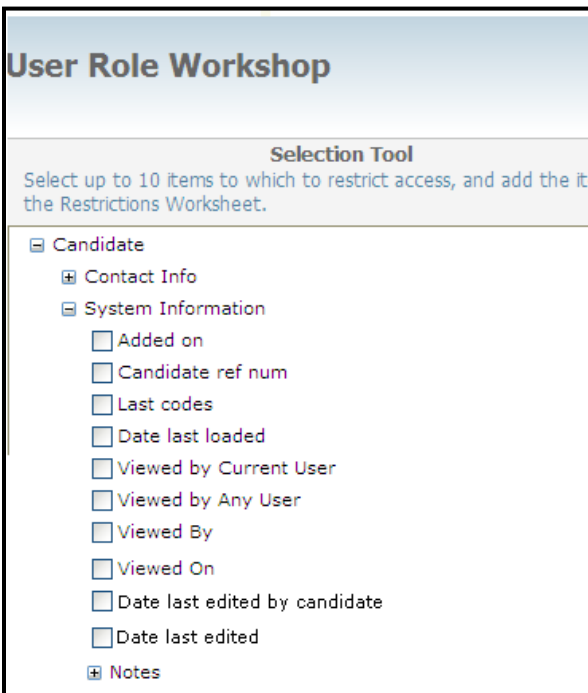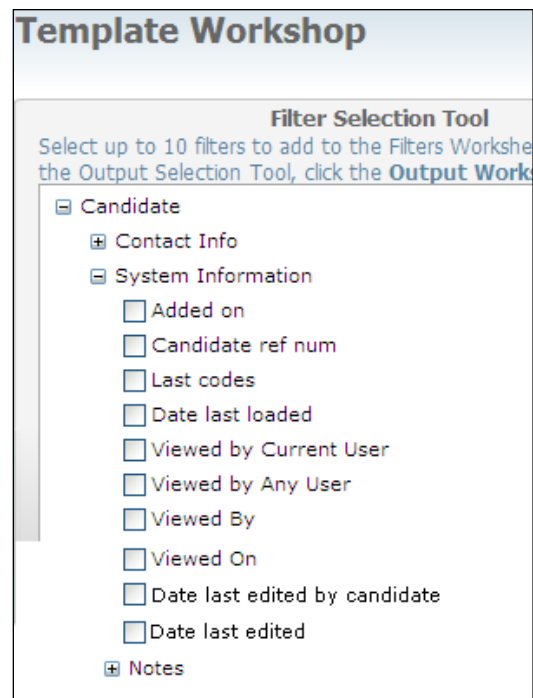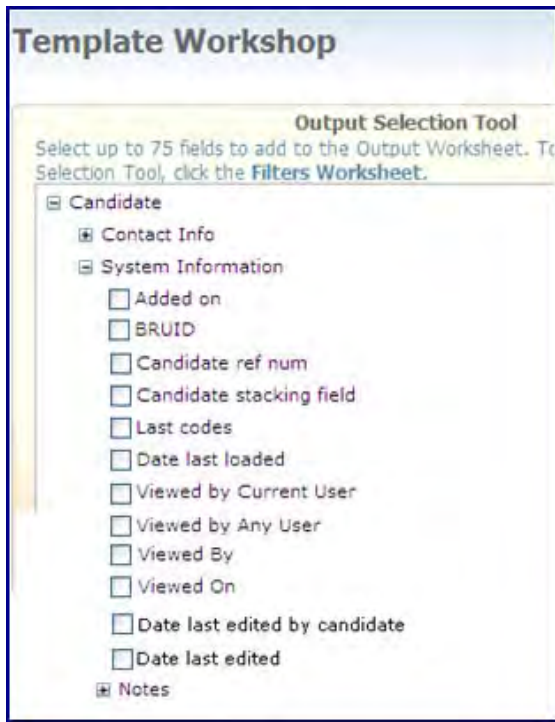
Before this change

Candidate information could not be selected by "date last edited on" (only by "added on date" and "date last loaded").

8. **SmartApproval – Approve Check-mark Launches Approve/Decline Screen** LDP051

For SmartApproval users, clicking the new "Checkmark" icon in the Approve column of New UI panels "My Reqs Pending Approval" or "All Reqs Pending Approval" takes them directly to the SmartApproval "Approval View" page. The user is able to approve or decline the req from this page. The "Approval View" page will be authenticated with the user login information. The user can navigate to the following tabs: Approvals, My Profile, and Admin.
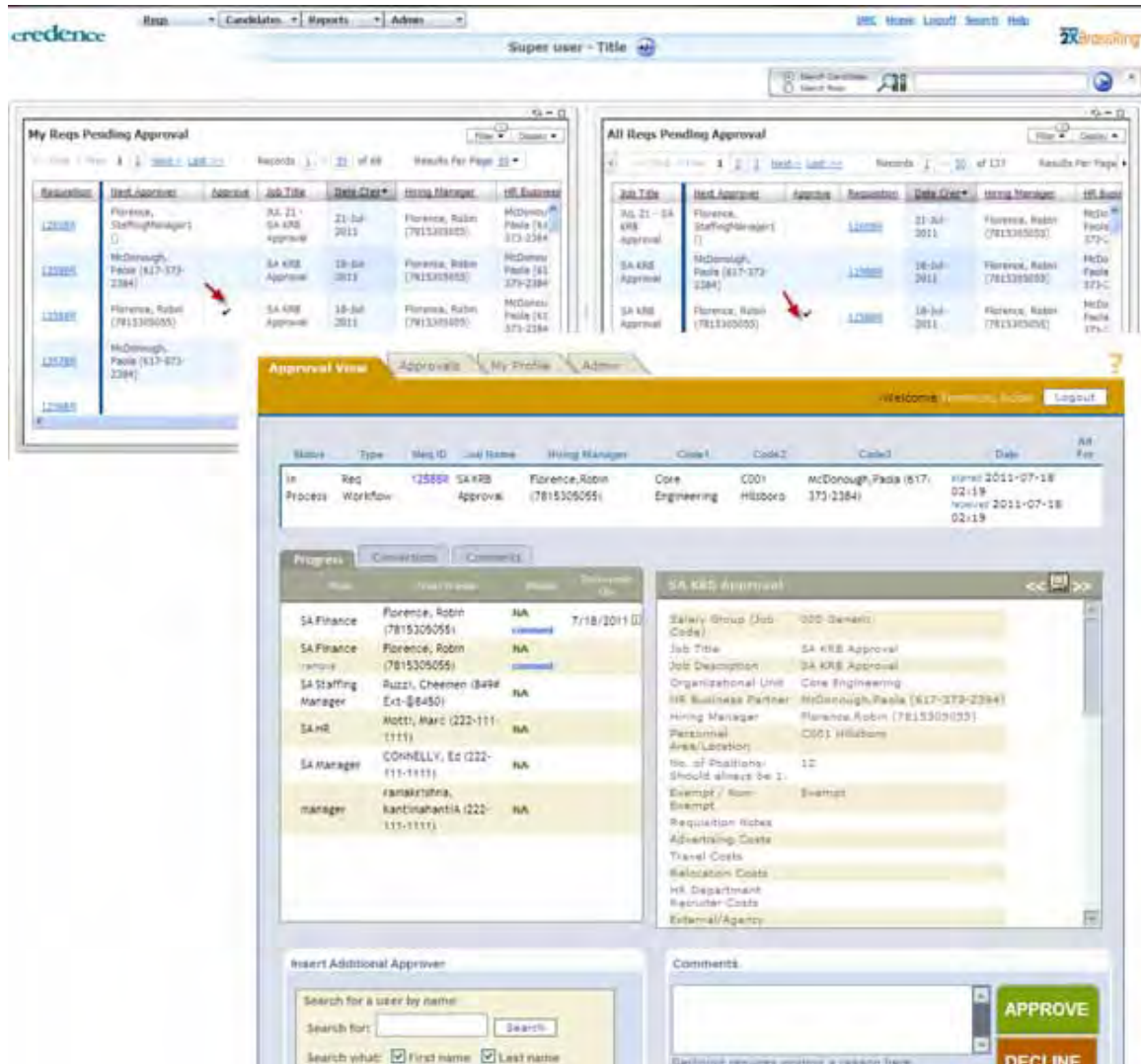
No new configuration is necessary for this change.

Before this change

Previously, SmartApproval users were taken to the Req detail page after clicking the checkmark.

9. Event Manager – Enhancements   LDP078

Several enhancements have been made, including the following:

Req ID and Job Titles associated with candidates in Event Manager will now display on candidate listing page. Message tokens will now have tool tips. Message templates can now be categorized to better manage the message template drop down lists throughout the product)

- All the pages where the candidate details are displayed are changed to include the requisition information (Req ID and Job Titles) associated with candidates). The following screens have been changed to reflect the requisition info.

Unscheduled Candidates

Scheduled Candidates

Candidate Search – Unscheduled Candidates

 Candidate Search – Scheduled Candidates

Event configuration; Candidates tab

View candidate page.

- There is a new system setting on the System Notifications page under Event Manager Admin called View Candidate's Requisition Info. This setting controls the display of requisition information on the above pages. Because it is so important to know the associated requisition of the candidate in Event Manager, the default setting is Yes so that the requisition information displays on all candidate listing pages.

With the system setting enabled, the following existing product behavior will be more obvious: If the candidate has been sent to the event manager from more than one requisition, the candidate record displays more than once. The candidate record will be displayed once for every requisition number. The candidate record will be displayed even if the candidate was sent to event manager from a working folder in contrast to sending from a requisition folder. When the candidate is sent from a working folder, the requisition number will be blank.

- The view candidate page will also have the requisition information to which the candidate is associated to. Regardless of how the system setting is configured, the history tab of the view candidate page will have the requisition to this particular candidate req combination in contrast to the current functionality where all the requisitions that the candidate is associated with are displayed.

- The Invited column on the Candidates tab on the Event configuration page will display the date in which the candidate was invited to the event as opposed to the green checkmark which displays in the current product. Having the invitation date as opposed to a generic checkmark display will allow users to better differentiate between invitation records for the same candidate.

- If the Unscheduled Time Slot feature is enabled for the client and a user deletes a candidate from it, only the records associated with that record's event invitation will be deleted. Previously, all related as well as unrelated invitation records for that candidate were deleted if just 1 invitation record was deleted. The warning message that displays when deleting invitation records has been updated to clarify what now happens when the action is taken.

- The Message Template configuration page in Event Manager Admin has a new field called "Category". This field allows users to categories their message templates by the different types of usage. There are six categories: Assessor Send Email, Candidate Confirmation, Candidate Invitation, Candidate Reminder, Candidate Send Email, and All Other Messages. To be consistent with legacy product behavior, all categories are selected by default so that the message template is offered for all uses.

- All pages that allow messages and message templates to be configured now offer tool tips for every Event Manager message token. Users can move their mouse over the message token and see the tool tip which will gives a short explanation of what the message token represents.

10. Proximity Search – Refreshed City Lists   RDP578

City list (location data) has been updated for proximity searching with two additions:

- Staten Island added for New York state 93229/177577

- St. Jean sur Richelieu added for Quebec province   90782/175724

11. Community Gateway – Passive Source Changes   89910

Monster will no longer be supported as part of the Community Gateway Passive Source feature. This decision was made after careful review of the number of clients using Community Gateway, the decreased usage of this feature, and the engineering time required to address changes made by Monster.com.

We will continue to support Community Gateway. Passive source through CareerBuilder (via the CareerBuilder tab) is also currently supported. However, we will be hiding the Passive Source feature tab from the Community Gateway landing page by the end of the year.

Notes for Internal Kenexa

The following features to be announced in the next major release have no visible changes in this build for 2xB without configuration, but may have visible configuration changes in Workbench Self-Service (noted below where applicable). Full enablement on these features will be available with the next release.

12. RDP521 Talent Gateways – Launching Login Page

Workbench: New setting (**Go directly to login page from external URLs**) on TG details page eliminates the need for applicants to click Apply a second time when they have already clicked while viewing job details.

For candidates who are applying to Talent Gateway jobs from an external site, this feature saves a second click when the applicant has seen the job details and clicked an Apply button or link on the external site. As a result of this enhancement, the applicant will see the following:

- Non-GQ flow: Very briefly the Job details page, and then almost immediately the Talent Gateway login page.

- GQ flow: The Job details page grayed out in the background with the Gateway Questionnaire login page in the foreground.

Previously, the candidate applying from the external site would land on the Job details page of the Talent Gateway and would have to click the Apply button a second time.

13. RDP526 Avature CRM Integration

Integration with CRM vendor Avature.

Workbench: Added new option to the CRM client setting to enable Avature support. No other code changes are required as this was developed in anticipation of Avature being supported. No visible changes in 2xB without configuration. See Design Document for integration details:

http://intappshare/EngMainSite/EngProj11/RDP526%20%20Avature%20CRM%20Integration/CRM_Design_1-26-11.docx

14. RDP528 Gateway Questionnaires – Candidate Form field response repeat option

With current GQ functionality, responses that candidates have answered in a previous application are saved and presented back to the candidate if they go through another submission. There are some fields that candidates must always read and answer again (e.g. agreement to terms fields or the scored questions regarding essential education/experience). This project allows for disabling pre-filled responses to selected GQ field(s) at the GQ widget level.

WBSS: New Checkbox within the GQ widget add/edit

Tools > Gateway Questionnaires > Add new Gateway Questionnaire or Administer section/pages [for selected GQ] > Administer widgets [for selected page] > Add/ Edit widget > Widget properties > Question

If the checkbox is checked, then the responses will NOT pre-fill for the selected question. By default, this is unchecked.

This checkbox should be presented for all Question sources (e.g., Gateway form questions, Contact information fields, Code fields).

See spec for additional details:

http://intappshare/EngMainSite/EngProj11/RDP528%20%20Candidate%20Form%20field%20response%20repeat%20optio/RDP528%20Functional%20spec.doc

15. RDP530 Gateway Questionnaires – Minimize text area size depending on character length

Provides ability to minimize the amount of scrolling that is required to view the GQ pages. Currently even if a text area is set to 50 or 4000 characters on a form or a GQ, it visually renders in the same format (i.e. a fairly big text area). This can cause scrolling on GQ pages. Text area can now be dynamic or configurable and appear smaller/or bigger depending on character limit OR for configuration.

WBSS: New setting (Configure GQ question text area row height) will display when adding a question widget to a Gateway Questionnaire

Tools > Gateway Questionnaires > Add new Gateway Questionnaire or Administer section/pages [for selected GQ] > Administer widgets [for selected page] > Add/ Edit widget > Widget properties > Question
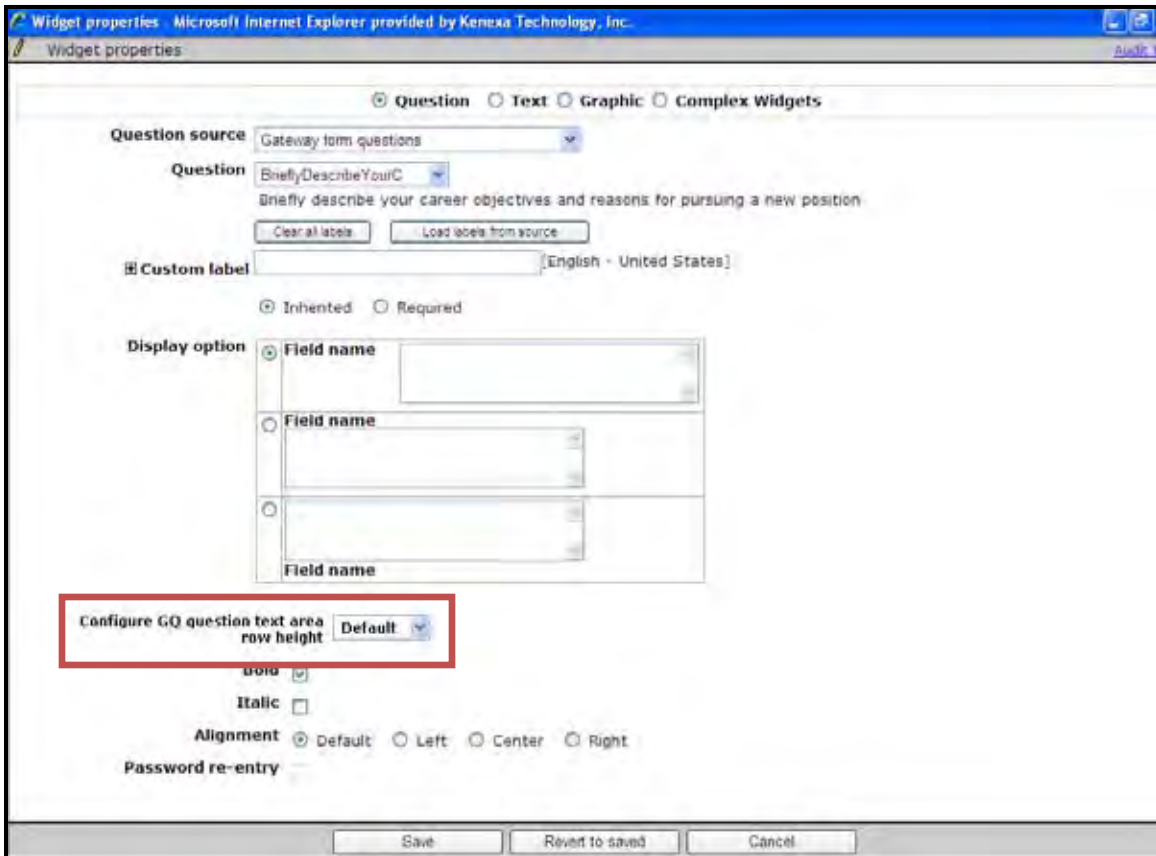
The setting will adjust the response text area size depending on the number of rows selected

- New setting is not required and will only display on the Widget properties page for a specific question with the field type "Text area" selected

- If the user doesn't select a numeric value (options are 1-30) from the drop down list then the text area size defaults to render as it does today using the existing number of rows.
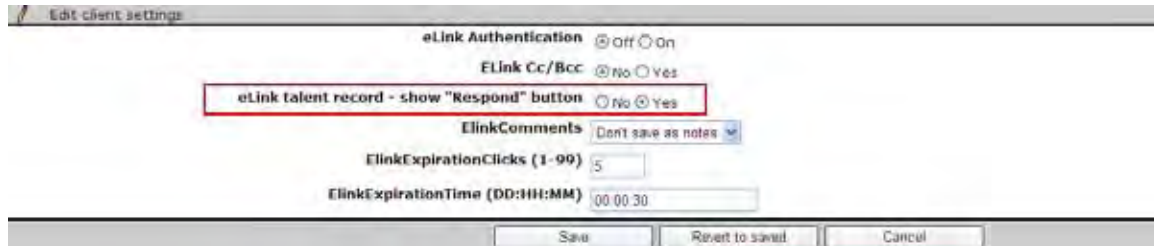
See spec for additional details:

http://intappshare/EngMainSite/EngProj11/RDP530%20%20Minimize%20Text%20Area%20size
%20depending%20on%20chara/RDP530-
Minimize%20text%20area%20size%20depending%20on%20character%20length%20in%20GQ
%27s%20Functional%20Spec.docx

16. RDP531 eLinks – Remove Respond Button

When an eLink is sent from a candidate talent record or from the actions menu in a candidate grid, the receiver of the eLink has the option of posting a response to the notes section of the candidate talent record using the "Respond" button placed at the right hand corner of the displayed talent record. This project provides a way to remove this button.

WB: New client setting (**eLink talent record - show "Respond" button)**

- Setting's default option set to 'Yes' to display and enable the 'Respond' button and the text 'Click to send your feedback on this candidate:''

- Option = No to hide the 'Respond' button and the text.

See spec for additional details:

http://intappshare/EngMainSite/EngProj11/RDP531%20%20Remove%20respond%20button%20
on%20elink%20C785/RDP531_FunctionalSpec.doc

17. RDP533 Talent Gateways – Customize 'Send to Friend' Button Label

Project provides a way to customize the label for the 'Send to friend' button, which appears on the 'Search results' and 'Job details' page of Platinum Full Talent Gateways that have not disabled the Send to friend functionality in the Special configurations section of the Talent Gateway details page. Clients will be able to customize this button label on different types of Talent Gateways, such as Employee Referral Gateways.

2x BrassRing – no visible changes

Talent Gateways – Some labels on two pop-up windows in the 'Send to friend' workflow ('Email friend' window and 'Email friend' confirmation screen) have been changed to be more generic so that they make sense in the Send to friend workflow or and in other workflows (such as a 'send to referred candidate' workflow).

Workbench/WB Self-Service:

Adding new '**Send to friend button text**' setting on:

- 'Search results' tab

- 'Job details' tab of the TG text customization UI.

Updating default text for two settings:

- On the Talent Gateway details page: 'Sent to friend text:'

- On the Search results tab of the TG text customization UI: 'Send to friend pop-up text:'

Both of these settings contain the following default text:

'If you would like to e-mail selected jobs to a **friend**, please fill out the form below.'

This has been changed to:

'If you would like to e-mail selected jobs to a **recipient**, please fill out the form below.'

This will affect new Talent Gateways only.

See spec for additional details:

http://intappshare/EngMainSite/EngProj11/RDP533%20%20Customising%20Label%20of%20TG%20Button%20Send%20to%20Fri/RDP533C787_FunctionalSpec_CustomizeTGS2FButtonLabel.doc

18. RDP534 Forms – Displaying Inactive Options for Req and Candidate Forms in Edit Mode

This setting became visible in build 3 instead of build 2.

A new client setting allows you to display inactive options for 2xB users editing req and candidate forms, so they are able to see an inactivated option that had been **previously selected** (when it was still active). The new setting, "Display inactive options in Edit Mode for Reqs and Candidate forms" is set to No by default. When enabled, 2xB users editing the forms will see field options that have been inactivated with the status "(Inactive)" appended to them, as they currently see in View mode.

Field options can be radio button, checkbox, query-select, single-select, multi-select, and auto-fill for Candidate form fields, Req Standard and Req Custom fields. Display of inactive options is applicable only for Reqs and Candidate forms; does not apply for subsidiary forms, addendum forms, or any other type or forms.
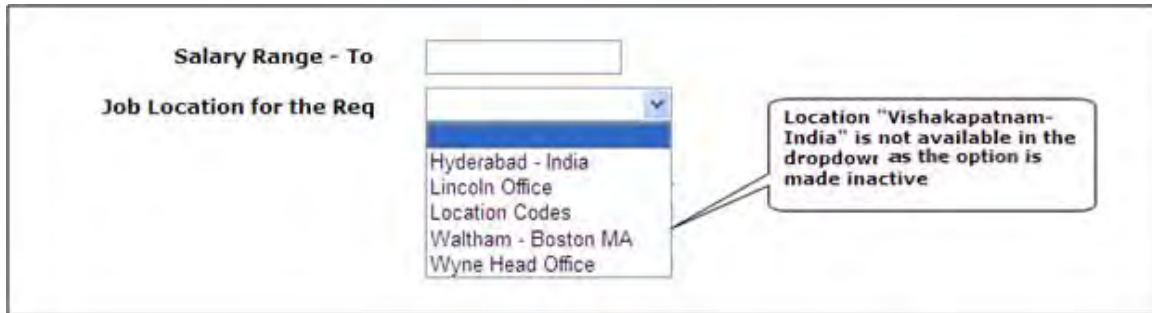
Affected workflows include:

- Edit Req
- eLink Req in edit mode
- Req Approval in edit mode
- Talent Record -> Forms -> Edit form
- Talent Record -> Forms -> eLink form in edit mode
- List filtering – If an option is made inactive for a question having list filtering, it should be populated in edit mode.
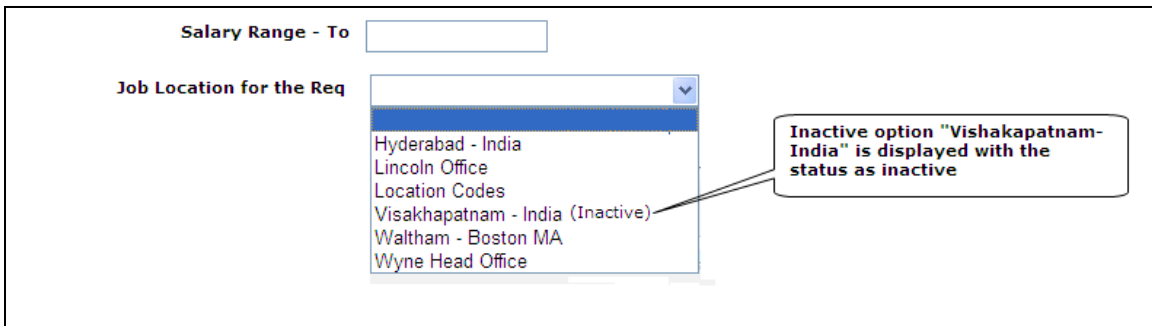
Before this change

Users could see an inactive value only when viewing the form:

But not when editing the form:

Now users will see the inactive option and still be able to re-select it if necessary to save the form with other edits.

19. LDP054 – Candidate Form Field Association

Project will allow the selection of an option in one field to restrict (or automatically select) the options available in a subsequent field on a candidate form, as is currently possible on requisitions. It provides the ability to associate a candidate field to multiple other candidate fields. When a selection is made within the 'parent' candidate field, a subset of the full list of values will automatically be populated within the subsequent associated 'child' candidate fields.

This will be a **Workbench Self-service visible change** on field attributes. An import from either XML or Excel is required to make the 'associations' via a new Import type called **Field association (Candidate forms and Document subsidiary forms)**.

Tools > Forms > Candidate forms >Administer form fields > Edit field attributes > Save and continue (to 2nd page)

A new **Export field association** action on the **Administer form fields** page within Workbench will allow Workbench users to export the child associations for each parent candidate form field.

Tools>Forms>Candidate forms>Administer form fields

The project also allows upload/maintenance of field associations by Kenexa employees through a Workbench utility, and upload/maintenance of field associations by clients through an XML integration.

Tools>Imports>Profiles>Add New Profile

See spec for details:

http://intappshare/EngMainSite/EngProj11/LDP054%20%20Candidate%20Form%20Field%20Associations/PROD%20MGMT/LDP054-CandidateFieldAssoc-FUNC%20SPEC.docx

Release 12.5, Build 2 Visible Changes

This section describes the 2x BrassRing visible changes in this build, proposed for release on September 1, 2011.

Cumulative documents with visible change information for previously released builds are available on the User Resource Center. See the Release 12.4 Resources section for R12.4 builds; see Release 12.3 Resources for R12.3 builds.

Summary of Visible Changes in this Build

Feature	Description	Page
New UI – Talent Record Enhancements	Enhancements include Talent Record Contact/Resume section tab persistence and X value persistence for Speed browse "Showing X of Y Candidates" LDP090	62
New UI – Performance Enhancement	Scrolling performance enhancement announced for Build 1 was delayed until Build 2 LDP081	62
Assessments – Invitation Email Sent on Submit	Assessment invitation email will be sent when the candidate clicks "Submit" RDP564	62
Update Multiple Reqs – Add to Req Team	New options now allow users to preserve or overwrite team members when adding new team members LDP082	63
Data Insight Tool – Report Types Options	Data Insight has "Requisition" and "Default" Report Type options to handle reporting when count of candidates is zero RDP567	64
SmartApproval – Enhancements	Smart Approval is synchronized with 2xB req status changes LDP051	65
UTC for Routine Maintenance Message	We are now using Universal Time Code (UTC) in our "routine maintenance" messages to clients. RDP537 169614	65
Gateway Questionnaires – Display of State Names	Both standard and custom state and province names will display with initial capital letters Onyx 93640/177840	66
Candidate Forms – Closing Confirmation Automatically	When users successfully save or delete a candidate form, the confirmation pop-up will close automatically after 1-2 seconds 179184	66
Candidate Forms – Enhancements	Minor "look and feel enhancements" are being made to fonts and buttons that will be visible **in Build 3**	66

1. New UI – Talent Record Tab Persistence LDP090

When a user views a Talent Record in single view or browse/speed browse mode, the tab selection in the middle section will now persist, remaining selected through logout and future logins, until the user selects another tab.

In addition to the tab persistence in speed browse, the "Showing" selection will also persist until it is changed by the user.
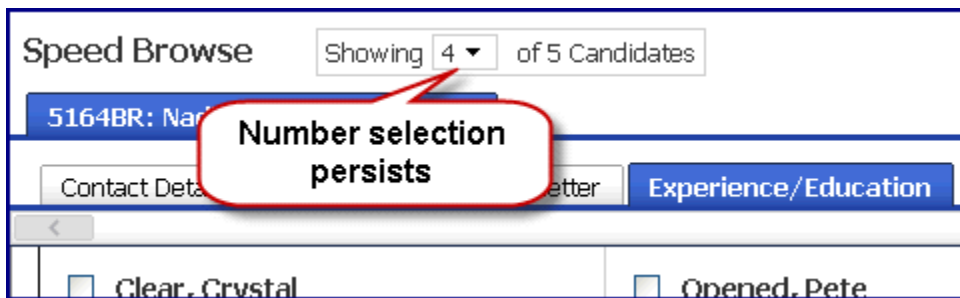
If the number that is selected to speed browse is less than the "Showing" selection, then "Showing" reflects the actual number of candidates selected. This does not become the new persistent selection; "Showing" returns to the persistent number prior to the lower selection.

2. New UI – Performance Enhancement LDP081

The following will be a visible change with this release (previously announced for Build 1, then delayed).

Scroll-to-load-rows
When users scroll within a grid, the grid now renders only the visible rows and the next one or two rows below the bottom of the panel. This means page rendering happens up to three times faster. When users move the scroll bar handle, the next set of rows will load. The only change most users will perceive is the speedier page rendering, but occasionally users may briefly see a "loading…" message on the screen.

3. Assessments – Invitation Email Sent on Submit RDP564

For clients with integrated Kenexa Assessments, the way candidates are sent an invitation to take assessment tests is changing slightly. Currently, an email assessment invitation is sent to the candidate when the candidate clicks the "Continue" button on the confirmation page, or clicks the assessment link presented on the confirmation page.

In order to minimize the possibility that candidates could miss performing this step, after this build the assessment invitation email will be sent at the same time the candidate clicks "Submit."

4. Update Multiple Reqs – Add to Req Team   LDP082

On the **Update multiple reqs** page (select multiple reqs->Update), two new options are available when selecting users to add as Req Team members: "Overwrite existing" and "Append to existing" (described below). This change allows easier update of multiple Reqs to append or remove an individual user from all the selected Reqs, with the option to overwrite the existing users or to preserve them.

- **Select to Add to Requisition Team**
  The new radio button options are available here, with a list of all the system users. This list does not display any users as pre-selected, regardless of whether or not they are a current Req Team member. Options include:
  Overwrite existing – completely removes existing Req Team members, replacing with the new members for the multiple reqs
  Append to existing – keeps the existing Req Team members and adds the new members

- **Select to Remove from Requisition Team**
  This list displays all users who are included in the Req Team on at least one of the selected reqs. An error message appears when your selections would result in removing all the Req team members from at least one of the selected reqs, or when you select a team member for both the Add and Remove action.

To add some members and delete some members at the same time, select the appropriate names in "Select to Add To Requisition Team" (users selected in this control will be selected/added) and "Select to Remove from Requisition Team" (users selected in this control will be removed).

For more than 200 users, scaled select text boxes will continue to be displayed, but the new options are available.

Before this change

When you updated multiple reqs, the new Req Team member(s) replaced all the other users that had been present on the reqs.

5. Data Insight Tool – Req Reports when Count of Candidates is Zero

Previously, if a user wanted a list of open reqs (such as those opened on a particular date, with first and last names of the candidates), only reqs with candidates in their folder were returned. For example, if Req A had 2 candidates and Req B had none, Data Insight's results included data only for Req A. This occurred because Data Insight executed an inner join on reqs and candidates, so returned only those reqs with associated candidates.

To address this problem, Data Insight will now include new **Report Type** options for users to select when reporting on reqs. The options, which are selected on the Template Summary screen, are:

- **Default**
  Generates reports with current functionality; only reqs with at least one associated candidate will be returned

- **Requisitions**
  Returns all req rows regardless of whether candidates are attached to a requisition or not.
  For example, will return rows including: Req A and all associated Candidates to the Req, Req B with blanks in the Candidate's first and last name as there are no candidates.
  If the user selects "total candidates" as an output option, then the total for Req B will be "0."

- **Working Folder**
  Returns all folder rows regardless of whether there are any candidates in the folder. For example, will return rows including: Folder A and all candidates in the folder, Folder B with blanks in the candidate's first and last name if there are no candidates. If user selects "total candidates" as an output option, then the total for Folder B will be 0.

New Report Type Options with Hover Text (draft text in yellow is *not final*)

All current Data Insight templates will be set to "Default" for Report Type setting on the Template Summary Page. Users can change the selection in edit mode. User/Roles functionality is not affected by this change.

6. SmartApproval – Synchronized with 2xB Req Status Changes LDP051

New status change functionality between 2XB and SA will be a visible change for SmartApproval users. When a 2xB req status changes from Pending to Cancel, Delete, Decline, or Put on hold, the requisition in SmartApproval will also be updated with the new SmartApproval status. For example, if the status of the req in 2xB changes from Pending to Cancel, the status for this req is also updated in SmartApproval with the new SmartApproval status "Req Status Changed."

The status of reqs existing in SmartApproval prior to this build, which have Cancel, Delete, Decline, or Put on hold status in 2xB, will be updated in SmartApproval with the new SmartApproval status "Req Status Changed." No email notification will be sent to approvers in this case. No new configuration is necessary for this change.

7. UTC for Routine Maintenance Messages RDP537

We will now be using Coordinated Universal Time Code (UTC) format in our "routine maintenance" messages concerning Talent Gateway and 2xB maintenance. Time zones around

the world can be expressed as positive or negative offsets from UTC, the time standard used by international broadcasters and for aviation, as well as for many Internet and World Wide Web standards.

The new outage message is:

"This site is currently undergoing routine maintenance. The site is scheduled to be available no later than UTC *[{{YYYY-MM-DD HH:MMZ}}]*. The current time is UTC *[>>YYYY-MM-DD HH:MMZ<<]*. Please retry the site at a later time. We apologize for the inconvenience."

### 8. Gateway Questionnaires – Display of State Names Onyx 93640/177840

Gateway Questionnaires were displaying standard state name field options with initial capital letters, and displaying custom state/province name field options in all uppercase. As of this build, both standard and custom state and province names will display consistently with initial capital letters.

9. Candidate Forms – Closing Confirmation Automatically 179184

When users successfully save a candidate form when adding or editing it, or successfully delete a form, the pop-up displaying the confirmation message will close automatically after 1-2 seconds.

Before this change

Users had to close the Add/Edit/Delete form confirmations by clicking the **OK** button.
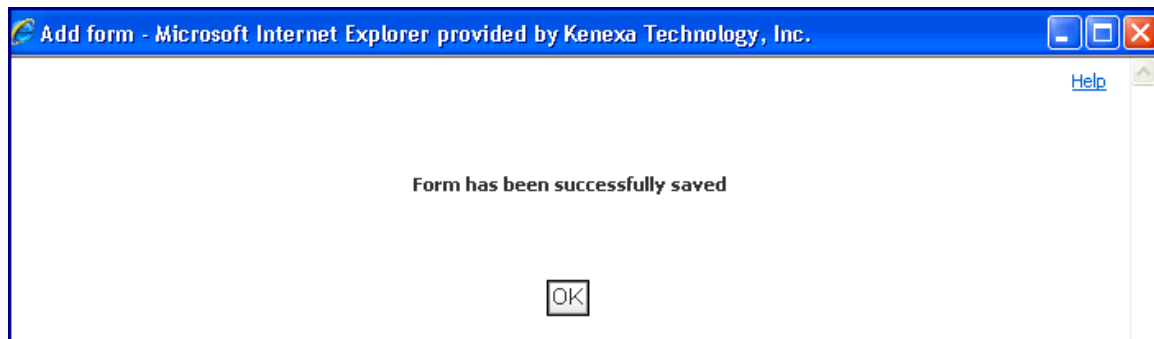
Workflow remains unchanged if the form is not successfully saved or deleted.

Notes for changes in 12. 5 Build 3

10. Candidate Forms – Minor "look and feel" changes visible in Build 3

Candidate forms are being updated in Release 13 with some highly anticipated functionality changes, such as question branching, enhanced layout, and field association. The enhanced layout will allow clients to configure forms in multiple columns, control field label orientation (above/left of field input), and utilize different font styles and more.

In preparation for this project, the candidate forms pages (Add form, Edit form and View form) will be using more a more flexible and updated code and you will start to see some minor visible changes beginning in Release 12.5 Build 3 (Sept 22). These minor user interface updates will include things like: incremental changes to field label font size, field input data font size, button font size, button size. These changes may be experienced differently based on browser and browser version.

There are NO FUNCTIONAL changes being made to the forms as of Release 12.5 Build 3.

More detailed information will be available prior to Sept 22, 2011.

Notes for Internal Kenexa

The following features to be announced in the next major release have no visible changes in this build for 2xB without configuration, but may have visible configuration changes in Workbench Self-Service (noted below where applicable). Full enablement on these features will be available with the next release.

11. LDP058 – Assessment Lifespan Based on Score

Updates to the "Configure Assessment Vendor" screen, no client facing visible changes.

12. LDP063 – Doc Generator Dynamic Paragraph

No visible changes in Build 2

13. RDP478 File Types for Attachments by Portal

Project provides control of file types allowed as attachments on the Req and TG to which the candidate is applying.

WB: Introduces a new:

- Req template level attribute, "Restricted file types"
- TG level attribute, "Restricted file types"

Tools-> Forms -> Reqs -> Req forms -> Edit form attributes

Tools -> Talent Gateway -> Admin -> Edit

See spec for details:

http://intappshare/EngMainSite/EngProj11/RPD478%20%20File10%20%20Filestypes%20for%20Attachments%20by%20port/RDP478-Functional%20Spec.docx

14. RDP506 GQ validation message

Project provides message to ask candidates to verify whether they have answered forms and questions correctly when applying to jobs.

WB: Checkbox within the TG Text Customization and in GQ draft add/edit page window.

- WB setting will be at the GQ page level to indicate whether that page should prompt the candidate to verify their responses; returns them to the top of the page.
Tools -> Gateway Questionnaires -> Administer Sections/Pages -> [Page selection] -> Add/Edit properties
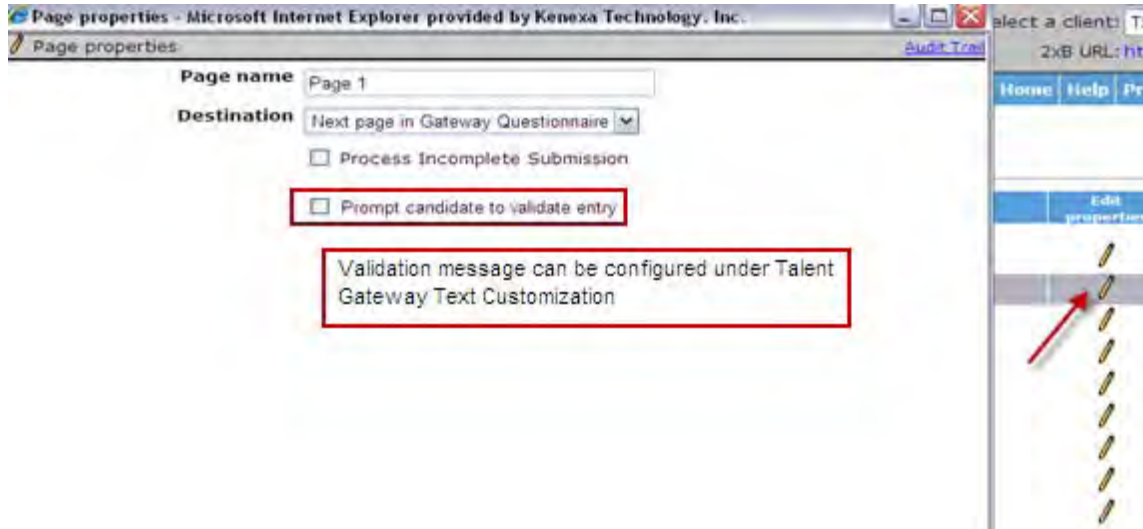
- Validation message can be input on Notifications tab in TG text customization which will be displayed to the candidate in the prompt.
Tools -> Talent Gateways -> Text Customization -> [Page selection] -> Add/Edit properties

See spec for details:

http://intappshare/EngMainSite/EngProj11/RDP506%20%20Associated%20Confirmation%20page%20per%20GQ%20C750/RDP506%20functional%20spec.doc
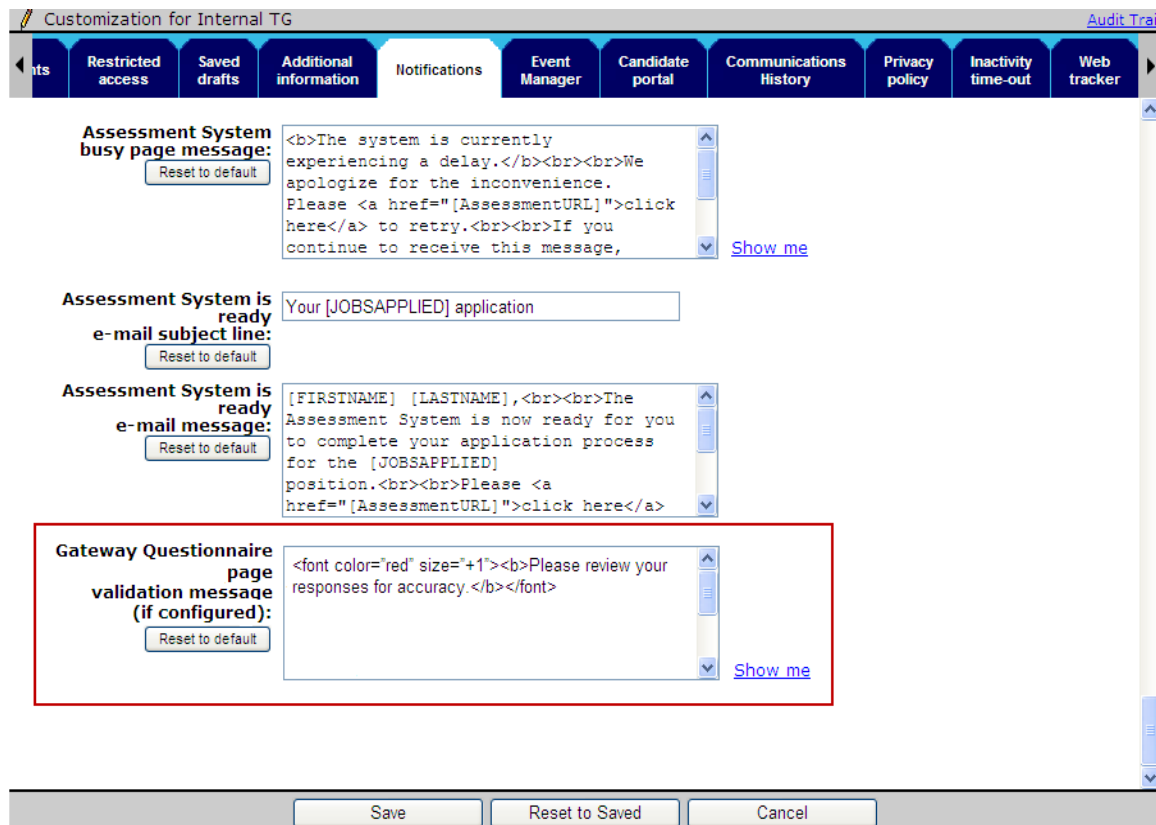
15. RDP526 Integrations – Avature CRM

No visible changes in 2xB without configuration. See Design Document for integration details:

http://intappshare/EngMainSite/EngProj11/RDP526%20%20Avature%20CRM%20Integration/CRM_Design_1-26-11.docx

16. Forms – Displaying Inactive Options for Req and Candidate Forms in Edit Mode RDP534

A new client setting allows you to display inactive options for 2xB users editing req and candidate forms, so they are able to see what had been **previously selected** (when the option was still active). The new setting, "Display inactive options in Edit Mode for Reqs and Candidate forms" is set to No by default. When enabled, 2xB users editing the forms will see field options that have been inactivated with the status "(Inactive)" appended to them, as they currently see in View mode.

Field options can be radio button, checkbox, query-select, single-select, multi-select, and auto-fill for Candidate form fields, Req Standard and Req Custom fields. Display of inactive options is applicable only for Reqs and Candidate forms; does not apply for subsidiary forms, addendum forms, or any other type or forms.

Affected workflows include:

- Edit Req

- eLink Req in edit mode

- Req Approval in edit mode

- Talent Record -> Forms -> Edit form

- Talent Record -> Forms -> eLink form in edit mode

- List filtering – If an option is made inactive for a question having list filtering, it should be populated in edit mode.

Before this change

Users could see an inactive value only when viewing the form:

Salary Range - To

Job Location for the Req Visakhapatnam - India

But not when editing the form:
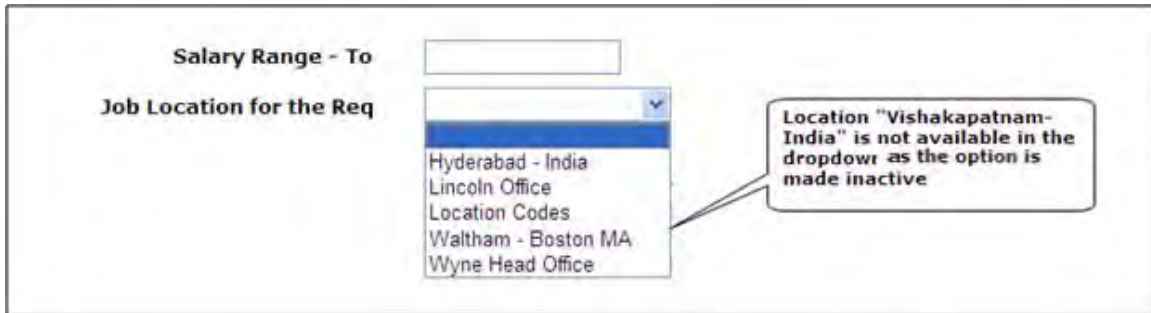
Now users will see the inactive option and still be able to re-select it if necessary to save the form with other edits.
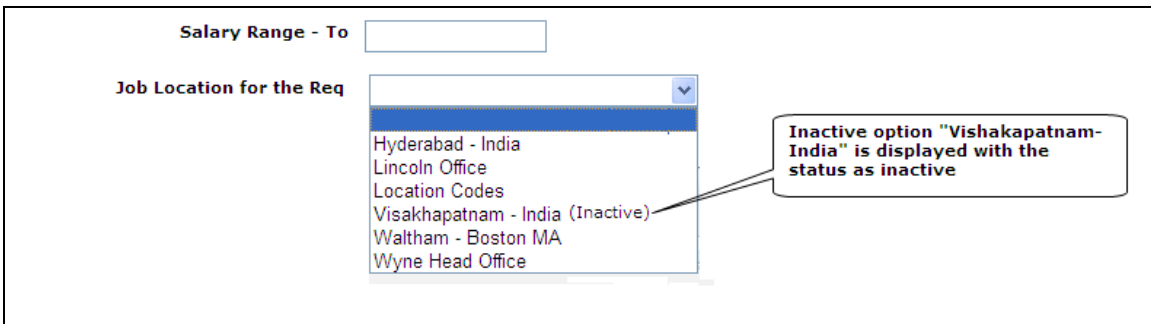
17. RDP570 Save User Type as New

This project will enhance the existing "Save User Type as New" Workbench action so that it not only replicates the User Type privileges but also replicates all associations such as: Forms, Form Fields, Candidate Types, and New UI Panels. This will potentially save hours of work for the person creating new user types based on existing ones since it will remove the need to go to each Form/Form Field in the system to set privileges for that User Type.

See Implementation doc for details:

http://intappshare/EngMainSite/EngProj11/RDP570%20%20Save%20User%20Type%20as%20New/RDP570-%20Save%20User%20Type%20as%20New%20-%20WB%20Implementation.doc

18. Onyx 93073/177519 EU Login to Workbench

Changing defaults and label in WB - EU Datacenter, to be consistent with standard WB.

When logging in to WB, user will log into staging environment as a default, both in standard and EU (currently EU login defaults to production.

Also renaming production environment name in EU from EU to EU-PROD for consistency with the EU-STG name.

19. Onyx 93451/177724 andTicket 166834 Disabling DEW privilege and the DEW clients setting by default for client setup

WBSS impact (DEW user type privileges)

Previously when new clients were created, "System admin" user type had the DEW privilege checked by default. Remaining standard user types had this privilege off. Since we are trying to drive customers to DIT (and "some day" retire DEW), for new clients the DEW privilege is now set to NO and will be disabled for all user types.

As of Release 12.4 Build 4, we had said that for existing clients we were disabling the DEW privilege checkbox (greying it out so it can't be selected in the future) for any existing client user types that didn't already have the DEW privilege checked. We are reversing that and allowing clients who currently have DEW enabled for some user types to enable it for additional ones they create.

20. 172688/172186 Configuring Designated Gateway for Mobile Apply

Currently while a user is editing a full talent gateway, in '*Include job specific questions for mobile apply*' we list all the Basic TGs configured for mobile apply that are of the same locale as the current TG. If either the locale of the current TG is edited or if the Locale of the basic TG is changed, this config "Include job specific questions for mobile apply" is lost. In the Add new Full Talent Gateway workflow, since there is no locale assigned to begin with, this list is empty as well.

To address this, the setting "*Include job specific questions for mobile apply*" will be changed to display ALL the Basic TGs configured for mobile apply TG.

While listing all the Basic TG's in this list, we will also add the locale of the TG in square brackets as a suffix (as shown in the following image)
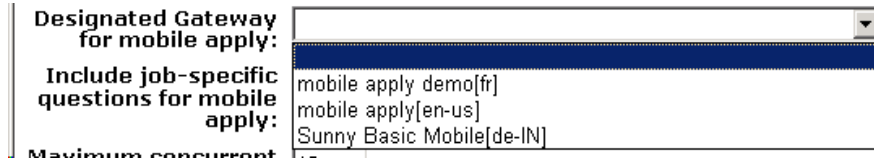
While saving the TG, we will also validate that the locale of the TG and the locale of the selected mobile apply TG matches. If not, following message displays:

If a Basic TG is configured as a mobile apply TG for any Talent Gateway then in the international settings of that Basic TG, the locale field will be disabled so that it cannot be changed.

Release 12.5, Build 1 Visible Changes

This section describes the 2x BrassRing visible changes in this build, proposed for release on August 11, 2011.

Cumulative documents with visible change information for previously released builds are available on the User Resource Center. See the Release 12.4 Resources section for R12.4 builds; see Release 12.3 Resources for R12.3 builds.

Summary of Visible Changes in this Build

Feature	Description	Page
Posting Defaults – Hiding Job Aggregator Passwords	Posting Interface Defaults pages will now suppress the display of passwords for your job aggregators **(Effective in Build 0, July 21, 2011)** 170080	73
Data Insight Tool – Reqs Posted to Agencies	Data Insight now supports a report that lists, by req, all the agencies the req was posted to RDP482	74
New UI – Enhancements	Enhancements include: scrolling performance change and launching change when viewing multiple Talent Records LDP081	75
Event Manager – Enhancements	Enhancements appearing in Event Manager include new Registration message editing button and pop-up LDP078/053	76
Resume Extraction – Simplified Chinese	Resume extraction now available for Simplified Chinese Talent Gateways RDP563	76
Administer Type Preferences – Security Improvement	When editing users in Admin+ > Users > Edit, you can no longer edit the email address of a user of any user type to which you do not have the add/edit type privilege configured in Administer Type Preferences Onyx 93606 / 177823	76

1. Posting Defaults – Hiding Job Aggregator Passwords (Effective in Build 0)

On the "Edit my posting defaults" screen, 2xB was displaying the actual passwords for each account along with their login names. Now when navigating to Posting Interface Defaults and clicking Edit my options Page, the password will be suppressed, displaying asterisks (******) instead.

Additionally, if users click Edit for any of the Posting Options, the Password column will show only asterisks. When users enter any new password, characters will also be suppressed as they are entered.

Password display before this change

## 2. Data Insight Tool – Reqs Posted to Agency Managers RDP482

Data Insight Tool users will now be able to report on which individual Agency Managers (AMs) have submitted candidates for particular requisitions over a period of time, including:

- All the agencies a req was posted to.

- Which agencies failed to provide candidates

- Historical req data at the agency level.

Users will see a new category and several new fields in **Reports > Data Insight Tool > Manage templates > Create new template| Edit template**. A new AM category field, **Agency Posting Details**, and its subfields appear under the category **Agency Manager**. The new fields will be available in Filter, Security User Role and Output Worksheets.

Fields include:

Field	Definition	Paths
Agency Posting Details	provides posting information about the req that was posted to an individual agency	Agency Manager
Agency manager name	Agency Manager name	Agency Manager > Agency Posting Details
Date req posted	date the req was posted to the Agency	Agency Manager > Agency Posting Details
Date req removed	date the req will be removed from the individual Agencies	Agency Manager > Agency Posting Details
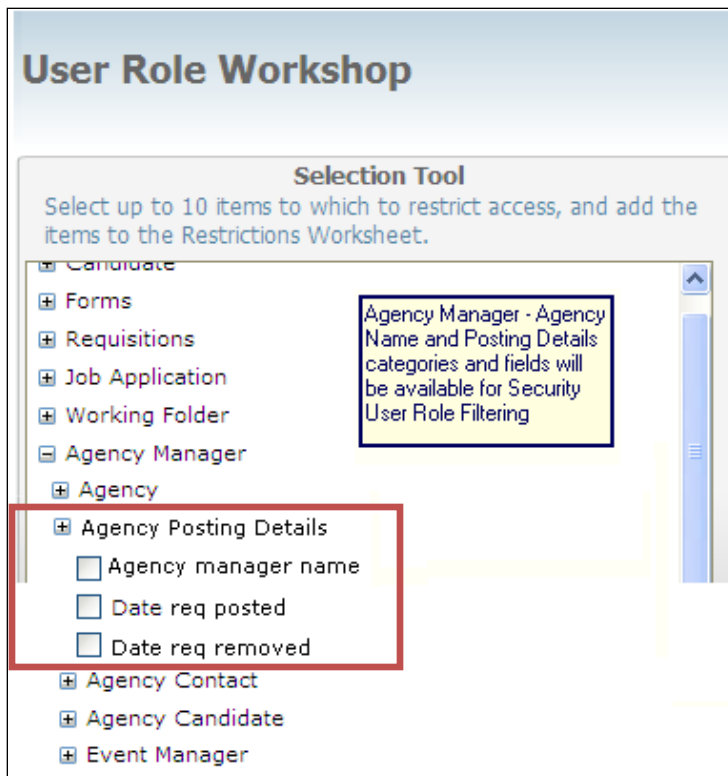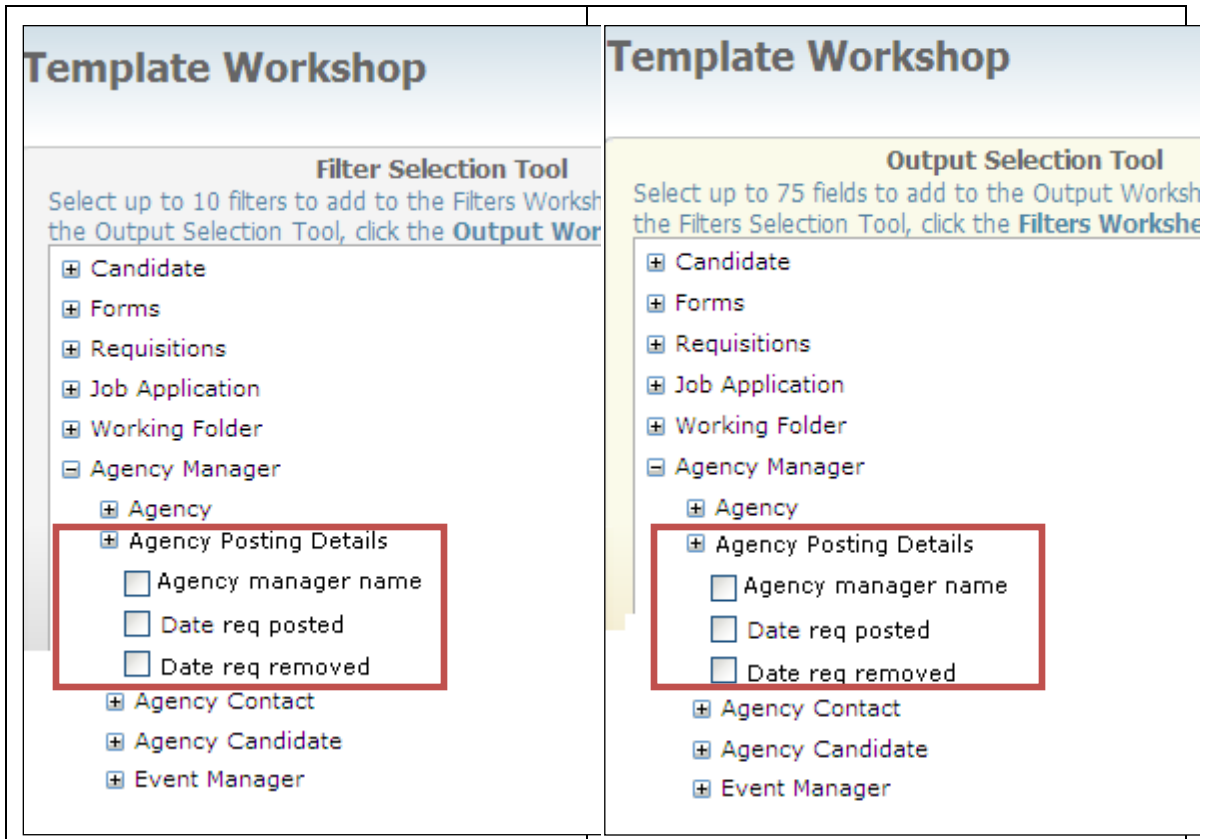
For historical req posting activity between multiple Agency Managers, select **Job Application > Site Name**.

- Data in this category indicates your organization has Agency Managers configured and has reqs posted to individual agencies(e.g. Agency Manager 1)

- Agency > General > Agency Name is the actual name of the individual Agencies that the req is posted to.(e.g., Taylor Associates)

Before this change

Previously, historical data was captured in 2xB at the Agency Manager site level only, not for individual agencies. Data Insight reports could identify if a req was posted to Agency Manager (because that information is stored at the site level), but would export the agency's name only if that agency had submitted a candidate.

3. New UI – Enhancements LDP081

The following will be visible changes with this release.

- Performance enhancements: Scroll-to-load-rows
  When users scroll within a grid, the grid now renders only the visible rows and the next one or two rows below the bottom of the panel. This means page rendering happens up to three times faster. When users move the scroll bar handle, the next set of rows will load. The only change most users will perceive is the speedier page rendering, but occasionally users may briefly see a "loading…" message on the screen.

- New Talent Record: Displaying multiple TRs
  If you have one TR open and click another one, the second launches in its own separate window rather than replacing the existing open window. This allows you to compare TRs if

needed, or interrupt your workflow without "losing" the previous TR you were working on (for example, if you'd like to look something up). With this new behavior, remember to close any TR windows that are no longer needed to avoid having too many TR windows open at one time.

4. Event Manager – Enhancements LDP078

For organizations using Event Manager, visible changes appearing in that module of 2x BrassRing include the following:

The Registration configuration page (Admin > List Maintenance > Registration Pages) will now contain an additional button called "Edit Messages." When clicked, a pop-up window will appear containing all of the registration page messages that can be customized. Customizable messages include:

- Message displayed when the event is full

- Message displayed when the event is unavailable because it has occurred already, been finalized, or been removed from the system

- Confirmation message displayed to candidates when they click the Reschedule button

- Confirmation message displayed to candidates when they click the Cancel button

- Other messages displayed when features such as registration locking and enhanced outcomes are enabled in the system settings.

NOTE: Clients who use the eLink expiration feature and/or the online reschedule restrictions feature will find that the already customizable messages displayed to candidates when these conditions occur have been moved from the existing registration configuration page to the new pop-up window containing all of the other customizable registration page messages. Any messages already customized for either of those conditions will be moved to the new page, so the messages will not need to be re-customized.

This change does not require any work from clients who want to maintain their current registration page messages. It merely allows clients who have been interested in customizing those messages to do so.

Please contact your Client Services Consultant for more information.

5. Resume Extraction – Simplified Chinese DELAYED RDP563

Resume extraction will now be supported for Talent Gateway and Agency Managers with Simplified Chinese locale. For candidates submitting resumes in Simplified Chinese, extractable fields (contact info, education, experience) will automatically be extracted to the 2xB candidate profile.

6. Administer Type Preferences – Edit User Type Security Improvement 93606 / 177823

The Workbench **Administer type preferences** setting "Allow this user type to add/edit the following user types" is designed to limit users' ability to add or edit user type to selected user types only, while restricting add/edit for the unselected types.

However, users with Admin+ privileges could still edit user *details*, other than user type, of individual users with a restricted type. This allowed them to edit the email address for a user of the restricted type, and exploit the "Forgot password" functionality to reset that user's password (and gain access at that user's privilege level).

This serious loophole has been closed. Users who are restricted from editing a specific user type can no longer edit the user type *or email address* of any user of that type (via **Admin+ > Users > Edit** [selected user].

Both user type and email address will now be grayed out on the Edit user page.
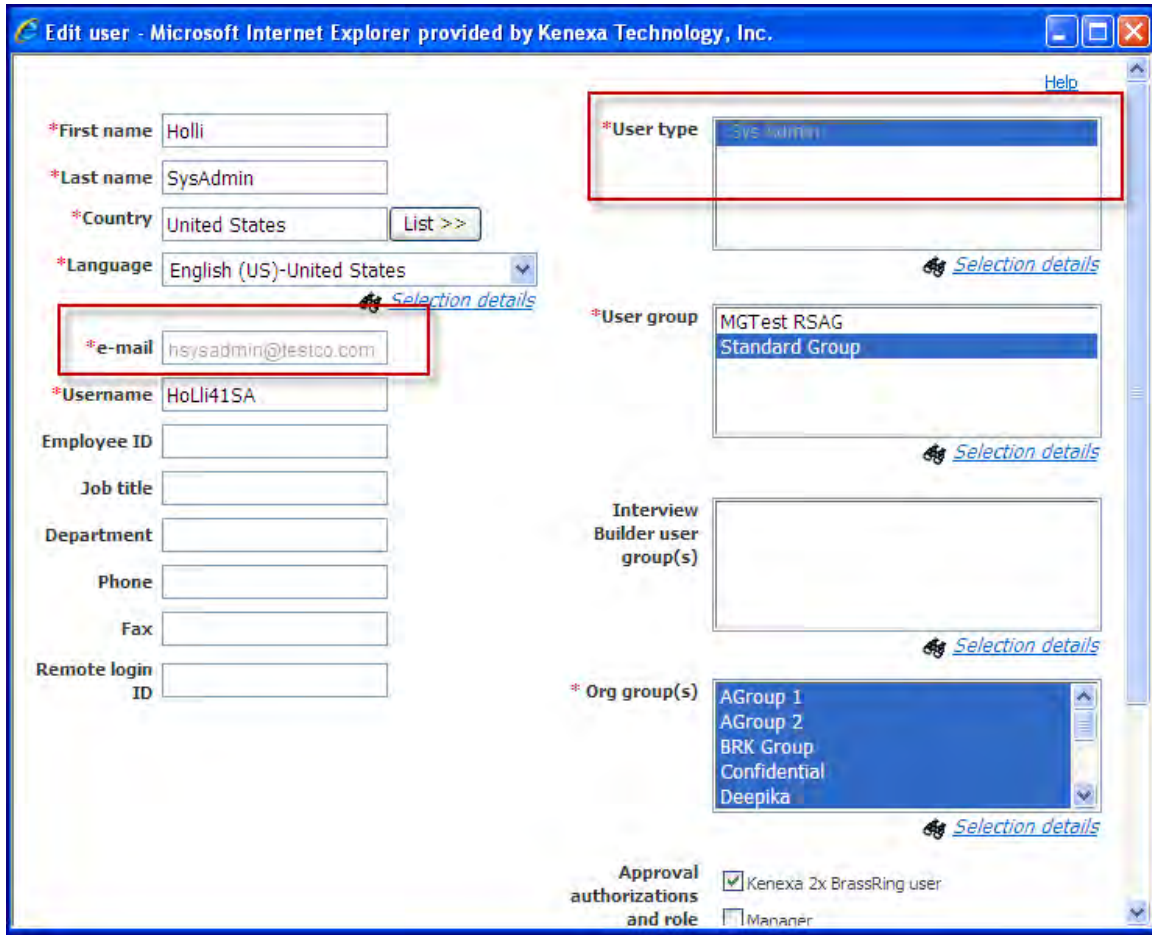
## Notes for Internal Kenexa

The following features to be announced in the next major release have no visible changes in this build for 2xB without configuration, but may have visible configuration changes in Workbench Self-Service (noted below where applicable). Full enablement on these features will be available with the next release.

7. RDP450 LDAP Authentication from Client-side Server (Active Directory)

Project provides ability to authenticate a 2xB user with LDAP on the client-side. The username and password information is validated against LDAP server. We are expanding the custom login to include LDAP integration credentials for validation.

Workbench - new LDAP Configuration: Administer custom login" icon (available in Admin > Manage clients for any client with custom login enabled), the administer page displays with new Action link "Configure custom login type" with open-book icon.

When "Configure custom login type" is clicked, a new window will display that will ask the user to select the custom login type they prefer.
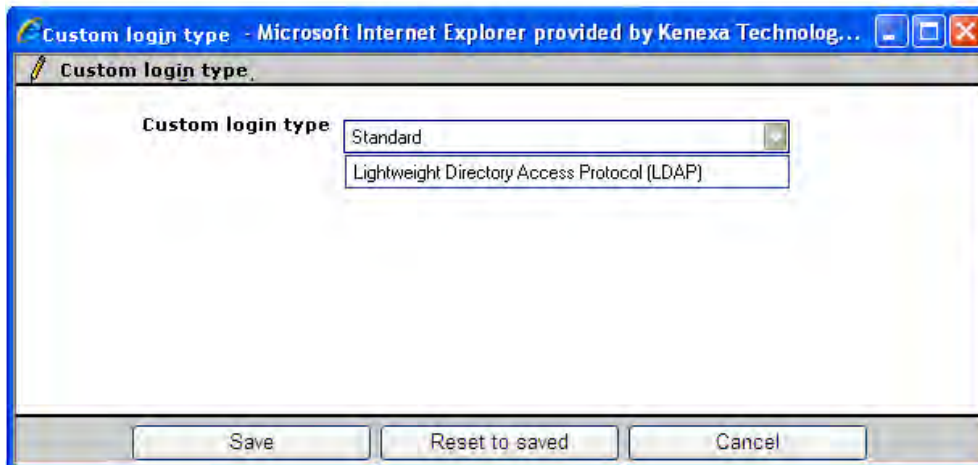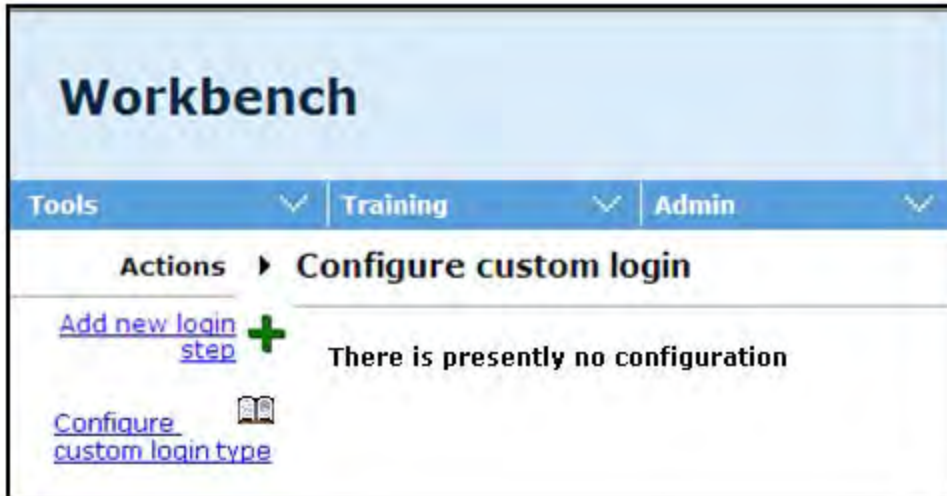
The default will be "Standard" which will be for existing Custom login type configuration. The only other option is "Lightweight Directory Access Protocol (LDAP)" which is the new custom login type configuration.

If LDAP is enabled then end user will see a third field on the 2xB login screen (below Password), populated with all LDAP names. Workbench enhancements expand custom login functionality to include LDAP integration credentials for validation.

See spec for details.

http://intappshare/EngMainSite/EngProj11/RDP450%20%20LDAP%20Authentication/RDP450-LDAP%20Authentication%20from%20the%20Client-side%20Server%20Functional_Spec.docx

8. RDP479 Disclaimer and agree before upload

Provides ability to surface disclaimers/ disclosures/ upload clauses to which the candidate must agree prior to submitting any uploaded materials. This will apply to the following scenarios:

- Job apply

- Non- job apply

- Profile edit

- Will also apply to GQ flows-> complex widget ->attachments

WBSS: new TG level attribute "Candidate Attachments Disclaimer Text"

WB-> Tools -> Talent Gateways ->Text Customization -> Attachments

See spec for additional details.

http://intappshare/EngMainSite/EngProj11/RDP479%20%20File1%20%20Disclaimer%20and%20agree%20before%20upload/RDP479-Functional%20Spec.docx

9. RDP516 Candidate search enhancement with AND

Currently, when a user in 2x BrassRing performs Candidate search function, all option list fields use "OR" logic (i.e., matches with selected-option1 OR selected-option2 returned) and users cannot search against candidate multi-select form fields with "AND" logic (i.e., only matches with selected-option1 AND selected-option2 returned). 2xB users will be able to use "AND" logic for searches in Candidate Search. This is especially helpful for search criteria based on multi-select candidate form field, for example when searching for candidates who must speak multiple languages or be authorized to work in more than one country.

WB: new Client setting to enable "AND" logic for custom multi-select candidate form fields, "Candidate search – enable 'AND' logic for multi-select form fields".

WB>Admin>Manage Clients>Edit clients settings

If client setting is checked, we will add two radio buttons labeled "Results must include ALL selections" and "Results may match ANY selection" right below the field label of the multi-select form fields on Candidate search page.

See spec for additional details.

http://intappshare/EngMainSite/EngProj11/RDP516%20%20Candidate%20Search%20enhancement%20with%20AND%20N201/RDP516_FunctionalSpec_C503.docx

10. RDP559 TG API set should cover New User creation and SSO flows

TG API set currently has Search API and Candidate APIs. Candidate API set comprises Authentication API (login, password reset) and a batch of other functional API that can follow Authentication call. There are 2 limitations in the current set.

- The API does not support new user creation.

- The API does not work with SSO TGs.

With growing number of clients using API as well as SSO, both will need to be addressed at the earliest. Although they will be used independent of each other, to complete the API set both should be implemented.

TG Candidate Authentication API – will be enhanced to support 2 new flows – as listed above. Both these methods will ultimately end up in creating an Authentication Token which can further be used in other API calls following.

11. RDP563 French Canadian and Chinese Resume Extractions

Burning Glass taking over from old vendor (Resume Mirror) for French Canadian extraction. Also opening up both traditional and simplified Chinese to be eligible for extraction. Creating new method for Burning Glass in the TG code. This new code to be done in such a way that Agency

Managers, TGs, and GQs all will access the same common code. No code changes necessary for other products.

Note: Only simplified Chinese will be ready for B1 (see external item), traditional Chinese and French are delayed.

12. RDP569-Community Gateway Monster Updates

Our posting partner Monster.com made an internal enhancement to their posting environments to post to 2 internal boards (Diversity board and Monster main board) instead of one. Kenexa was sending requisitions to be posted to Monster unaware of the internal changes they had made. When it was time for these requisitions to be unposted or deleted from Monster, the unpost/delete request was only referencing one board and not the other, therefore the requisition still posted out on Monster.com

We're changing the integration to send a slightly modified xml to them for diversity boards.

New Navigator setting on the Configure Sites Page: "Delete from both Monster and Diversity boards"

Navigator> Configure sites>Configure Client select a client>Configure Site>select Monster

See spec for additional details.

http://intappshare/EngMainSite/EngProj11/RDP569%20%20Community%20Gateway%20Monster%20Update/RDP569-Community%20Gateway%20Monster%20Updates%20Functional%20Spec.docx

13. LDP055 Custom Help Links

Workbench user will be able to configure links to the client's own custom help content per user type and language/locale combination. These links will be hosted on a page internal to 2x BrassRing. They will link to hosted content external to 2xB.

There are no visible changes for 2x BrassRing. The user type privilege must be enabled for any user to see the 'My Help' link. This applies to both Classic and New UIs.

There are visible changes for Workbench:

- New "**Configure custom help**" item in the 'Actions' menu on the User types page launches new **Configure custom help: [user type]'** page. Only Super User, Technical services, and

Self-Service Tiers 1-5 will have access to this item. Other WB users (Help Desk, Marketing, Training) will not see this new 'Actions' item

- New Admin+ user type privilege. "**Show 'My Help' link**"

See spec for details.

http://intappshare/EngMainSite/EngProj11/LDP055%20%20Custom%20Help%20Links/PROD%20MGMT/LDP055_FunctionalSpec_CustomHelpLinks.doc

14. RDP544 Update **Qlikview v10 SR1**

Not visible

15. LDP072 Default Grid Sort (added post build 3)

WBSS changes for more finely-tuned control of users' views for OFCCP clients:

New Reqs 2 user type privileges View all reqs Open menu – hide, View all reqs Pending menu – hide.

New My Reqs privileges View my reqs Open menu – hide, View my reqs Pending menu – hide
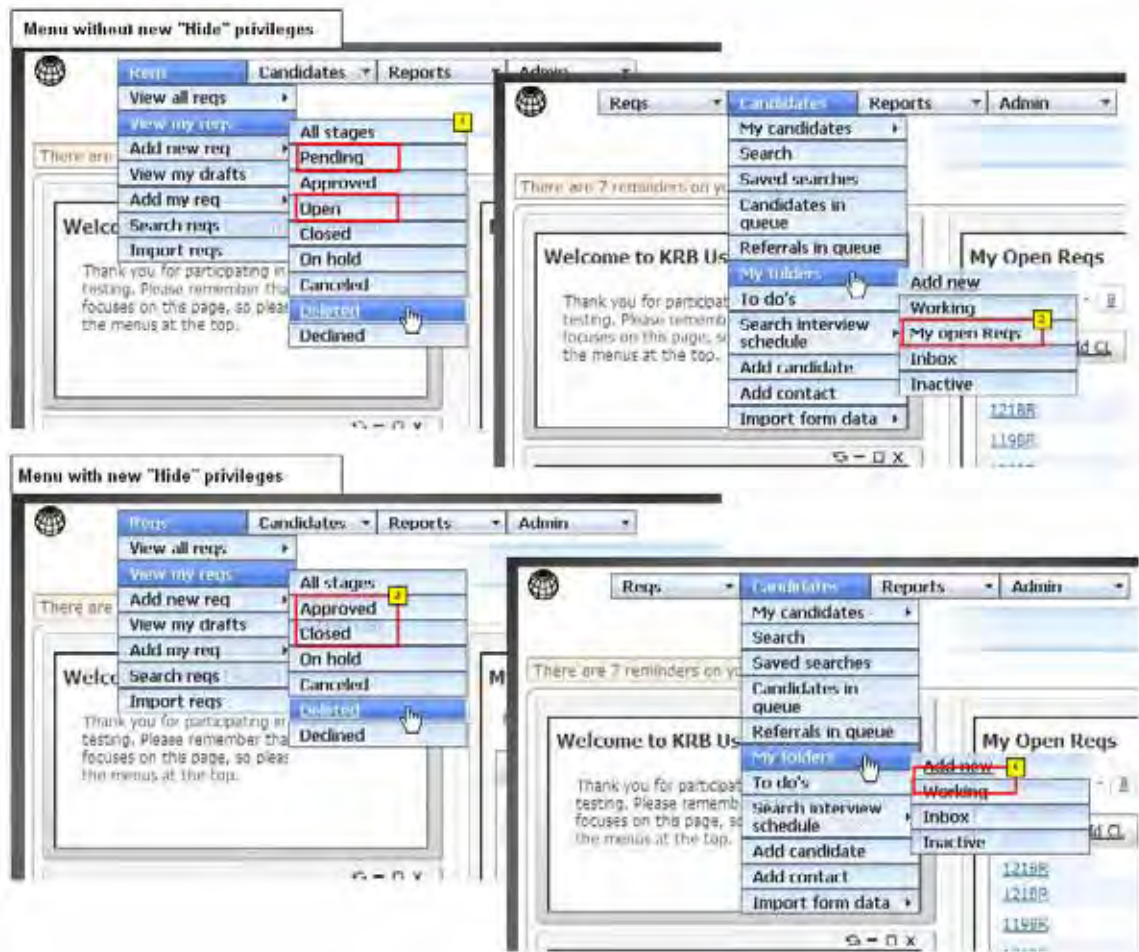
Panel configuration page for the Candidate Results Panel will now have a new field called "Panel attributes for setting default sort columns (Tools>Settings>Panel configuration>Candidate

Results>Administer configuration>Add or Edit configuration)

R13.0 Where Projects are Documented

The following list shows the Release 13.0 project numbers, where the projects are documented, and title of the document in the Product Update Guides, as of February 2.

Key				
Dark green In PUGs – final	Light green In PUGS - draft	Blue In Visible Changes (within PUGs, no separate feature writeup being done	Orange To be done for PUGS (intensity indicates priority)	Grey No doc needed

RDP 450	Custom Login LDAP Authentication	PUG Bobbi
RDP 478	Attachments – Restricting Types Candidates Upload	PUG Katie
RDP 479	Talent Gateways - Disclaimer Statement	PUG Bobbi
RDP 482	DIT – Reqs Posted to Agencies	Done in 12.5 enablement/PUGs
RDP 506	GQs – Validation Message	PUG Katie
RDP 508	Posting Reqs - Update newly selected or Unselected Only Button	PUG Katie
RDP 516	Candidate Search - Enhancement with "AND"	PUG Bobbi
RDP 520	eLinks – Deep Links Authentication on SSO Talent Gateways	PUG Bobbi
RDP 521	TGs – Landing Page Enhancement	PUG Bobbi
RDP 522	Candidate Experience - Welsh System Support – Browsers and Languages	PUG Katie
RDP 526	Integrations - Avature CRM	PUG Katie
RDP 528	GQs – Disabling Prefilled Responses	PUG Bobbi
RDP 530	GQs – Configurable Text Area Height	PUG Katie
RDP 531	eLinks – Removing Respond Button from TR	PUG Katie
RDP 533	TGs - Relabel Send to Friend Button	PUG Katie
RDP 534	Reqs and Candidate Forms - Inactive Options in Edit Mode	PUG Katie
RDP 536	Candidate Forms – Viewing Privilege for Req Team	PUG Kt
RDP 537	New outage message for TG & 2xB	Visible Changes 12.5 B2
RDP 538	Approvals – Abridged View of Req Details	PUG Bobbi

RDP 539	Communications - Recruiter User Signature Image Tokens	PUG Bobbi
RDP 544	Qlikview v10 SR1	Visible Changes 12.5 B4
RDP 545	JCDD Posting - Event batch support XLS and XML Simply adds event batch to data available for JCDD	Not doc'd
RDP 551	Candidate Portal - Extending SSO Authentication	DRAFTPUG
RDP 556	Integrations - Assessment Versioning	PUG Katie
RDP558	New UI – Custom Report Subpanel Enhancement	PUG Katie
RDP 559	TG API set should cover New User creation and SSO flows	Candidate API Configuration Guide
RDP 562	Expand Enterprise Pop-up window size	Visible Changes 12.5 B6
RDP 563a	Simplified Chinese resume extractions	Visible Changes 12.5 B3 System Support - Browsers & Languages
RDP 563b	French Canadian & TRAD Chinese resume extractions	Visible Changes 13.0 B0 System Support - Browsers & Languages
RDP 564	Integrations - Assessment Email Sent on Submit	PUG Bobbi
RDP 566	DIT – Filtering on Autofill fields	PUG Katie
RDP 567	DIT - Report Type Optiions	PUG Katie
RDP 568	DIT - Last Edited Date Fields	PUG Katie
RDP 569	Posting Reqs - Community Gateway Monster Unposts	PUG Katie
RDP 570	User Privileges - Save Usertype as New	PUG Bobbi
RDP 571	DIT Research for Standard Report templates	Research - Not Doc'd
RDP 572	Import and update zipcode proximity search data	Visible Changes – 12.5 B5
RDP 573	Kenexa Interview Builder - View Enhancement	PUG Katie
RDP 575	Social Media - Buttons on Talent Gateway Job Details Page	PUG Katie
RDP 577	Localizations for 12.5	Visible Changes Pre-Announcement – 13.0 B0
RDP 578	zipcode proximity search data tickets	Visible Changes – 12.5 B3
RDP 579	Change Cancel button to read Back on all TGs	Visible Changes – 12.5 B3

RDP 580	Integrations - HireVue Video Interviewing	PUG Katie
RDP 581	Internal Only - Background check tool validation (Asurint)	PUG-C Katie
RDP 583	Social Media – Restrict Posting Option on Talent Gateways	PUG Kt
RDP 587a	Social Media - Facebook Jobs Display from TGs	PUGDRAFT Katie - moved to 13.0.1
RDP 589	Sunset Provit integration	Internal Visible Changes – 13.0 B0
RDP 597	Replace AspEncrypt with Kenexa's Encryption Dot Net	Internal Visible Changes – 13.0 B0
RDP 599	Extraction Engine research	Research - Not Doc'd
RDP 611	Out of the Box Mapping added to Mapping Guide and Kenexa 2xB Mapping Tool Enhancements feature	Katie Mapping Tool Guide?
RPD613	secondary storage of older PDF Resumes	Internal Visible Changes – 13.0 B0

LDP015	Rules Automation Mgr-Link to User Guide Candidate Search and Error Handling (Phase 4)	PUG Gde on Launch Site	13.0 B0
LDP031	Companion Products - WorkBench Configurations (2XB-ENHANC-13.0)	PUGC	12.5 B4
LDP051	SmartApproval Enhancements (2xB-ENHANC-13.0)	PUG Bobbi	12.5 B3
LDP054	Candidate Form Field Associations 2XB-ENHANC-13.0	PUG Katie	12.5 B3
LDP055	Custom Help Links 2XB-ENHANC-13.0	PUG Bobbi Hi Priority	12.5 B1
LDP058	Assessment Lifespan Based On Score(unpaid enh) 2XB-ENHANC-13.0	PUG Bobbi	12.5 B2
LDP062	Talent Gateways – Candidate Portal Expansion	PUG Bobbi	12.5 B4
LDP063	Communications Dynamic Paragraph Numbering	PUG Bobbi First Draft Review	12.5 B3
LDP064	Communications - Relationship View for Templates, Blurbs and Fields	DRAFTPUG Bobbi	13.0 B0
LDP068	Communications – Send Candidate Ad-hoc SMS Messages	PUG Bobbi	12.5 B4?

LDP072	Default Grid Sorting 2XB-ENHANC-13.0	PUG Bobbi	12.5 B1
LDP074	Candidate Forms - Enhancements	DRAFTPUG Katie	Not done til 13.0 B2
LDP078	EVENT MANAGER - ADD'L USABILITY ENHANCEMENTS (2xB-ENHANC-13.0)	DRAFTPUG Bobbi	12.5.6, 13.0 B0
LDP082	Reqs – Requisition Enhancements	PUG Bobbi	13.0 B0
LDP084	Reqs - Job Code Filtering Enhancement	PUG Katie	12.5 B6
LDP086	Social Media – Posting to Multiple Accounts and Groups	PUG Bobbi	12.5 B5
LDP087	Social Media – Candidate Source Data Insight Tool - Candidate Social Media Source Information	PUG Bobbi	12.5.6, 13.0 B0
LDP088	Kenexa 2x BrassRing Mapping Tool (guide) and Kenexa 2x BrassRing Mapping Tool - Enhancements (feature document)	Guide on Launch site for internal, URC for external, Enhancements doc in PUG Katie	12.5 B4: Siva doc'ing, but need summary/pointer
LDP090	New UI - TALENT RECORD - Add'l Enhancements **2XB-ENHANC-13.0**	PUG Katie	Laurel/pointer 13.0 B0
LDP093	Kenexa 2x BrassRing Social Source – Enhancements	PUG Katie	13.0 B0