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Kenexa

Kenexa 2x BrassRing[®]

Release 13.1

Product Update Guide with Configuration

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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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Candidate Forms – Converting PDF to Image Format

This feature converts single and multi-page candidate forms in PDF format to an image file and transmits the converted file to a client's server. A custom trigger initiates the conversion process that can include tracking information.

Product RDP590 Release 13.1	↳ 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 converts single and multi-page candidate forms in PDF format to an image file and transmits converted files to a client's HR processing system. Additionally, custom-designed triggers can be configured to update information in 2xB and to track candidate forms exported as PDFs.

Candidate form types can include Gateway Questionnaire (GQ) response forms, cover letters, resumes, and job application forms. If the candidate forms include multiple documents and/or multiple pages, the conversion process compiles the multiple documents and pages into one image file and transmits the converted file to the client's system. When the conversion process is complete, 2xB users can access the candidate's Talent Record to confirm completion of the conversion and transmission process.

How Do Clients Get this Feature?

Please contact your Kenexa Support Team for implementation of this feature, which requires Professional Services Engineering (PSE) assistance. Your Kenexa Support Team will work with (PSE) to configure this feature. They will follow standard procedures for scoping out a custom trigger, and during the discovery process will identify the criteria required: specific candidate forms, candidates, destination FTP site, and 2xB custom triggers.

Candidate Forms – Declining Approval on Behalf of Another

This feature allows 2xB users to decline approval on candidate forms on behalf of the requested approver during the sequential or parallel approval workflow.

Product	<ul style="list-style-type: none"> 2x BrassRing
RDP 565 -Release 13.1	<ul style="list-style-type: none"> Talent Gateways
Visible Changes	<ul style="list-style-type: none"> Yes – details in <i>Visible Changes</i> document sent for each release build.
How do I get this feature?	<ul style="list-style-type: none"> Automatic – see details below.

Feature Description


This feature allows 2xB users to decline approval on candidate forms on behalf of a requested approver. When candidate forms are declined, status and date fields on the candidate form are updated and the form is re-routed back to the initiator and previous approvers. In order to access this functionality, candidate forms must be in a sequential approval process, be in a pending status, and 2xB users must have access to 'Modify' permissions for the Candidate Form.

2x BrassRing User Experience

2xB users who have Modify permissions for candidate forms, can now decline candidate form approval on behalf of the requested approver.

In 2xB:

1. Alternate 2xB user accesses the candidate form by clicking Form name hyperlink or clicks View form.

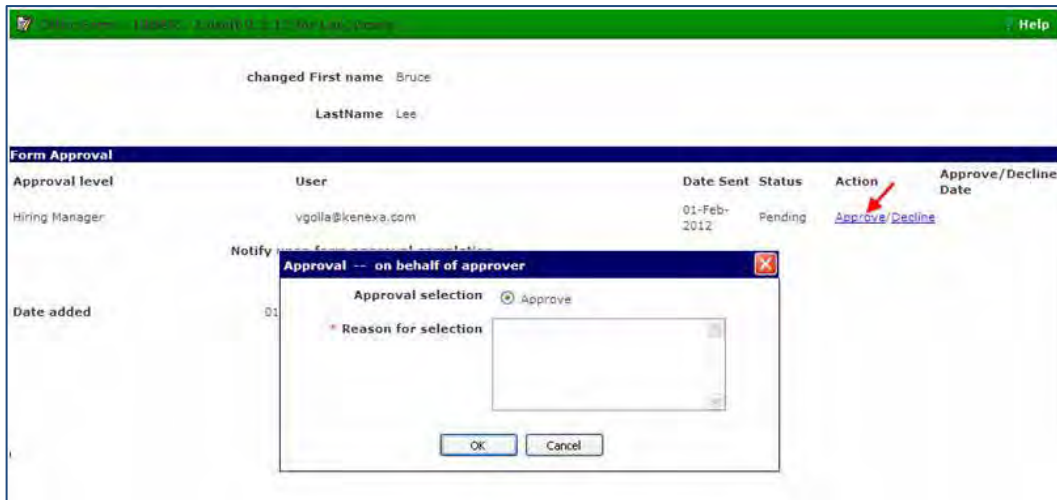


The Action options only display when the status of the candidate form is pending AND the 2xB user has one of three privileges: Add/View/Modify, or Modify All, or Modify – My Reqs.

The candidate form approval section displays.



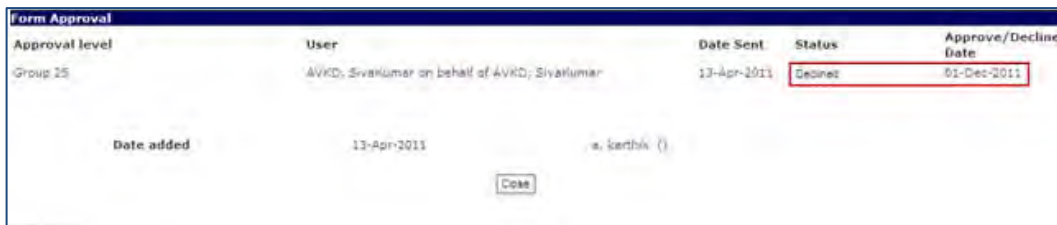
2. User clicks either the **Approve** or **Decline** hyperlink in the Action column. A dialog box displays, depending on user's choice and whether "Reason for selection" is required (asterisk indicator will be present when field is required):
 - When "Approve/Decline text area field input value is" setting is **Always required**," "Reason for selection" value is required for both Approve and Decline actions.
 - When "Approve/Decline text area field input value is" setting **Required for Approve only**", then "Reason for selection" value is required for Approve, but is not required for Decline.
 - When "Approve/Decline text area field input value is" setting is **Required for Decline only**", then "Reason for selection" value is required on clicking OK for Decline, but is not required for Approve.



3. User can provide a reason for approving or declining (as appropriate), and clicks **OK**.
4. 2xB user clicks **Save**.

The system updates the candidate form with the Status and Date fields, and name of the person who declined if the 2xB user has declined:

- Decline/Approval status
- Date of Decline/Approval action
- Person who Approved/Declined



5. 2xB user clicks **Close**.

An email message is sent to the prior approvers and the form creator when the form completes the approval process:

“The approval process for the form has completed.”

–OR– when the form is declined:

“The approver ([name of alternate who declined] on behalf of [name of requested approver]) has declined the form”. For example, “The approver (“Smith, Joe”) on behalf of (“Jones, Sam”) has declined the form.”

How Do Clients Get this Feature?

This feature is available automatically without configuration.

Workbench Self-Service Certified Users

In order for 2xB users to access the Approve or Decline actions during the sequential approval process, their user type must have the associated form attribute permissions:

- Add/View/Modify
- Modify All,
- Modify – My Reqs

The path to configure these permissions is: **Workbench > Tools > Forms > Candidate Forms > Add new form / Select existing form > Edit form attributes.**

Candidate Search – Default Number of “Days Back”

A new client setting allows you to change the default setting for the **Date last loaded** field’s number of “days back” to search for a candidate using Candidate Search.

Product	⌘ 2x BrassRing RDP593 Re1 13.1
Visible Changes	⌘ No – requires specific conditions / configuration for visibility.
How do I get this feature?	⌘ Configuration required to change current behavior – contact your Kenexa Support Team for implementation details.

Feature Description

A new client setting allows your organization to change the default setting for the **Date last loaded** field’s number of “days back” to search for a candidate using Candidate Search. The number set appears as the default for all users, but users can change the number as they are performing a search. (The change is not persistent; the default is in effect again when users navigate back to the search page.)

Candidates > Search

The screenshot shows the 'Candidates > Search' interface. On the left, there are several filter sections: 'Select candidate type(s)' with a dropdown menu, 'Agency referral' with radio buttons, 'How received' with radio buttons, 'Language' with a dropdown menu, and 'Last name' with a text input. At the bottom left, the 'Date last loaded' section is highlighted with a red box, showing 'Days back: 23'. Below this, there are date pickers for 'From' (24 Apr 2012) and 'To' (17 May 2012). On the right side, there are search criteria fields for 'City', 'Home phone', 'Zip/postal code', 'Employer', 'Position held', 'Degree', 'Educational institute', and 'DCODEType'. Each field has a search icon and a 'B' button. The 'Candidates per screen' is set to 50.

The system standard default was previously 30 days, and will continue as 30 days for existing clients. The default for new clients will automatically be set to “All.” (A value of All searches for candidate loaded at any time in the past.)

- The user can change the default and execute a search with a different setting. When the user navigates to the page again, the setting will go back to the default (i.e., not persistent).
- This feature/client setting applies only when using the Search action on the Candidates menu. Saved Searches, Overnight searches, Filter Folder, and Candidates > Find menu action are not affected by this new default setting since these areas already have the ability to set the days back number.

How Do Clients Get this Feature?

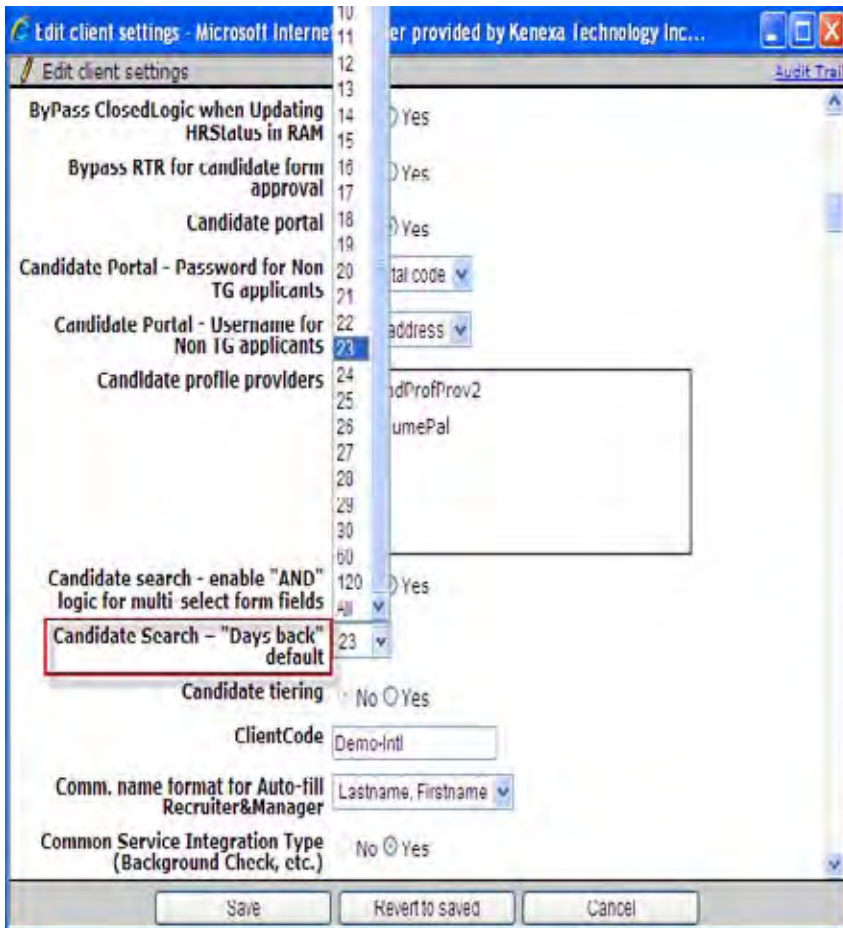
This feature is controlled by a new client setting. Please contact your Kenexa Support Team for more information if you wish to change the default number of days for your account.

Kenexa Tasks

Workbench

Change the “Days back” default with Client setting **Candidate Search – “Days back” default**.

Select Client > Edit



Options include integers 1 through 30, 60, 120, and All. The default is **30** (which was the previous default for existing clients and is **All** for new clients).

Candidate Search – Enhancements

The My Candidates search results page now displays the Req ID (new) and Req Title (existing) for each candidate. The Req ID and Req Title also display on the HR status update page and in the working folder.

Product	↳ 2x BrassRing
Release 13.1 RDP585	
Visible Changes	↳ Yes – details in <i>Visible Changes</i> 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 feature allows 2xB users with the My Candidates menu user type privileges to view the Req ID *and* Req Title for each candidate:

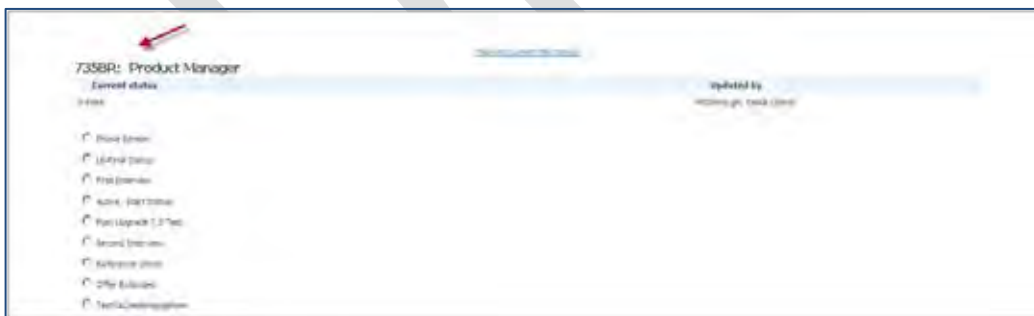
- in the My Candidates Search results page
- on the Update HR status page
- in the candidate’s working folder (when using the Find function with All or HR status).

Folder must be configured as an Outputable field in the Search results grid in order for users to view both the Req ID and the Req Title.

This example shows the My Candidates Search results page displaying the Req ID and Req Title:



When a candidate is in a req folder, clicking the HR status icon now displays the HR status page with the Req ID and Req Title:



When a candidate is in a working folder, clicking the HR status icon now displays the HR status page with the Req ID and Req Title.



How Do Clients Get this Feature?

This feature is a visible change for all users who have the existing user type privilege Candidate Categorization > My Candidates Menu.

Candidates – Bulk Upload

This feature lets the users upload multiple candidate records into the 2xB system in multiple locales.

Product	↳ 2x BrassRing
Release 13.1 RDP652	
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

Adding large numbers of candidate records to the 2xB system is a feature previously available only on Remote Recruiter, a companion product of 2xB that can be purchased by clients. However, when uploading candidates via Remote Recruiter, English (US) was the only available locale for option descriptions. Bulk upload of candidate records to the 2xB system is now available to users with appropriate user type privileges. In addition, this feature is available in multiple locales. User can import candidate information along with option descriptions of “candidate form data” in client-purchased locales. A sample file is available on the Add Candidate page for the users. Users can download the file to their local computer, enter the candidate information, and upload to the 2xB system. Validation of the candidate data occurs during the upload process.



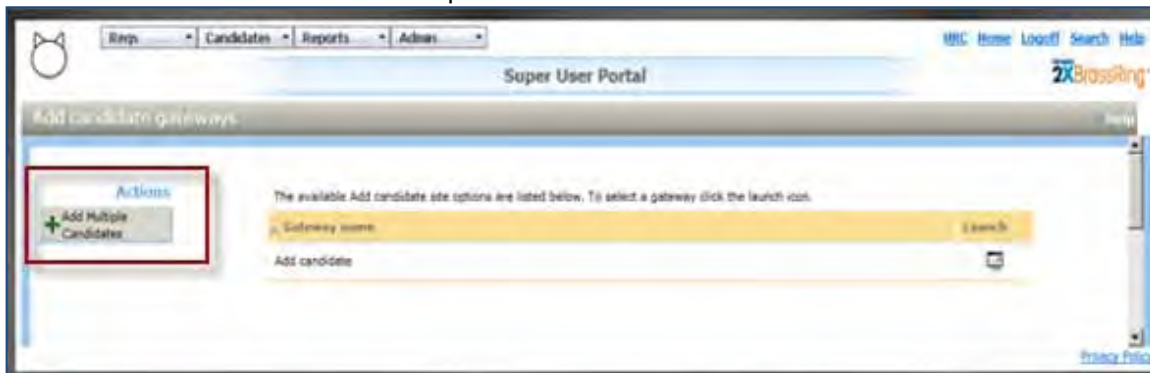
Using the bulk upload feature, users can import a maximum of 100 candidate records into 2xB.

2xB users require the “Candidates – Bulk Upload” privilege to use this feature.

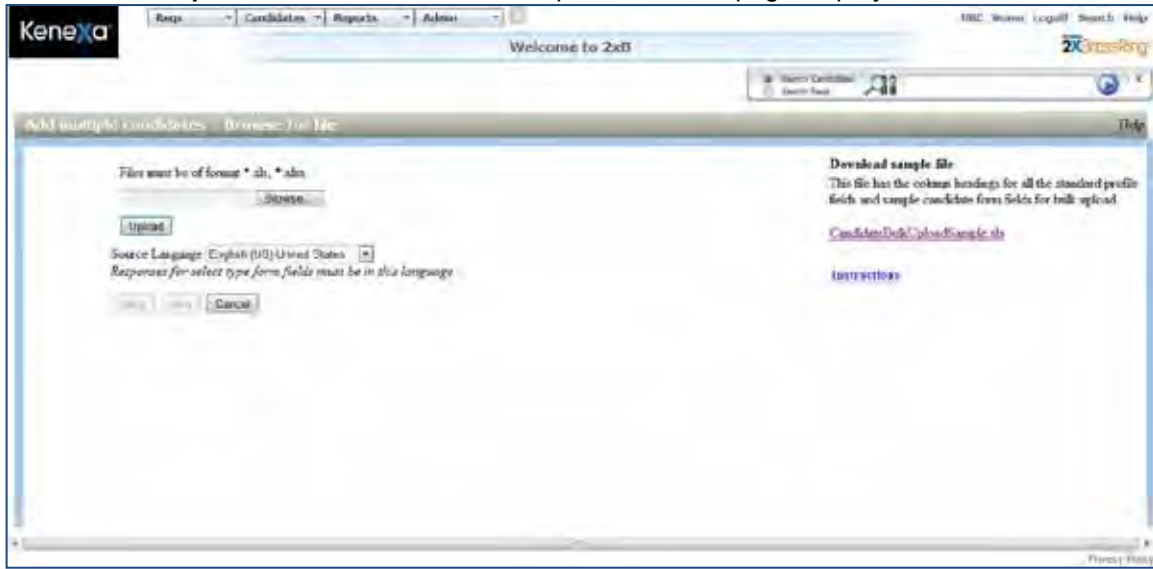
Uploading Candidates via Bulk Upload

To upload multiple candidates from within 2xB:

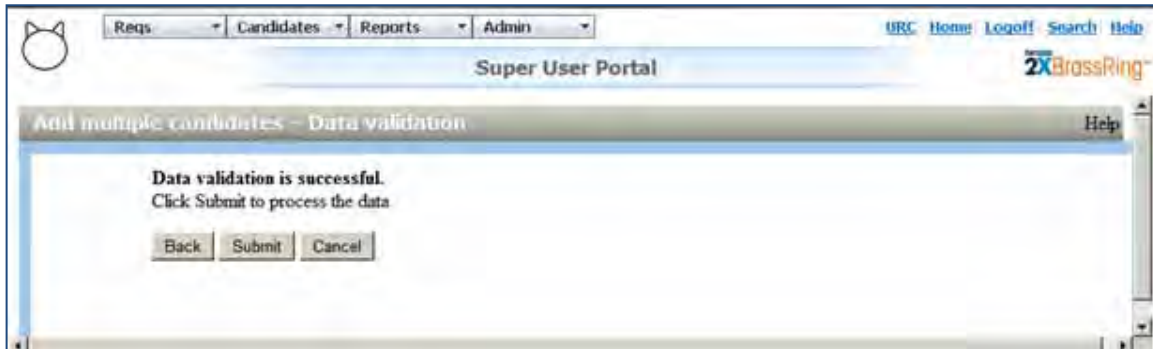
1. Click **Add Candidate** in the Candidates menu. The Add candidate gateways page displays, with a list of all available candidate and contact site options.



2. Click **Add multiple candidates**. The Add multiple candidates page displays.



3. To download a sample file into which you can enter candidate data for uploading to 2xB system, click “CandidateBulkUploadSample.xls” link. (You can skip this step if you have already prepared an appropriately structured .xls file for upload.)
To open an instructions spreadsheet explaining best practices for the spreadsheet creation and data, click “Instructions” link.
 - Provide the necessary candidate information in the sample file
 - Save your sample file for upload.
4. Select the locale for upload from the Source Language drop down.
5. Click **Next**. The system verifies that all the column headers in the file are appropriate and that candidate records have not exceeded 100, and displays a confirmation message.



- If the file fails verification, the system displays an appropriate error message.
 - If the system finds errors in the uploaded file, click the hyperlink with the error message to download a file that contains an additional column identifying the errors for each candidate record that has errors. Correct the records and upload the file once again into the system to process the candidate data.
6. Once the system validates the data that is uploaded through the file, click **Submit** at the prompts to submit the data for processing.
The system sends an email notification after the processing is complete with a Status/Error report.

After loading a file through Candidate Bulk Upload, the email response is:

From: RRCandidateUpload@brassring.com
Subject: KRB Candidate upload via Remote Recruiter complete

The candidate upload file you submitted for synchronization to KRB on 5/29/2012 2:05:00 PM has completed.

Please review the attached file. Correct any errors that have been identified and re-submit only those candidates for upload.

Re-uploading candidates that have the status of 'Candidate uploaded successfully' may result in duplicate records.

*Please do not reply to this email



If user wants to include auto-fill fields, user enters the responses for the auto-fill fields in the upload file. Auto-fill fields are not filled automatically when used in the upload file.

Do's and Don'ts in Preparing the Upload File

Do

- Whenever there is a "Date" field, format that column to text before entering the date.
- Input date only in a format that is acceptable. (DD/MM/YYYY)/DD-MM-YYYY)
- Use ## as the delimiter in multi-select choices (e.g., Weekdays that you are available – Monday##Tuesday).
- Ensure that the Candidate form field column headers are valid.
- Ensure Requisition ID is suffixed with BR. When a Requisition ID is provided in a row, enter the same ID in the codes field of that row to ensure that the candidate is filed to the req folder of that requisition.
- Fill the form field options cells with either code or code description.
- Filling information in the following fields is mandatory.
 - Firstname
 - Lastname
 - Email
 - Home phone
 - Language
 - Req ID (If at least one req form type is in the upload file, the ReqID column is required)

Don't

- Do not modify the standard column header fields on the downloaded file.
- Do not enter more than 100 candidate records in a file to upload at a time.
- Do not use comma (,) as delimiter in multi-select choices.
- Do not add form data for existing candidates. This feature helps add candidates but not to update candidate data.

Limitations and Known Issues

- You can upload a maximum of 100 candidate records at a time using this feature.
- The .xlsx format is currently not supported for upload. However, work is underway to support this format in near future.

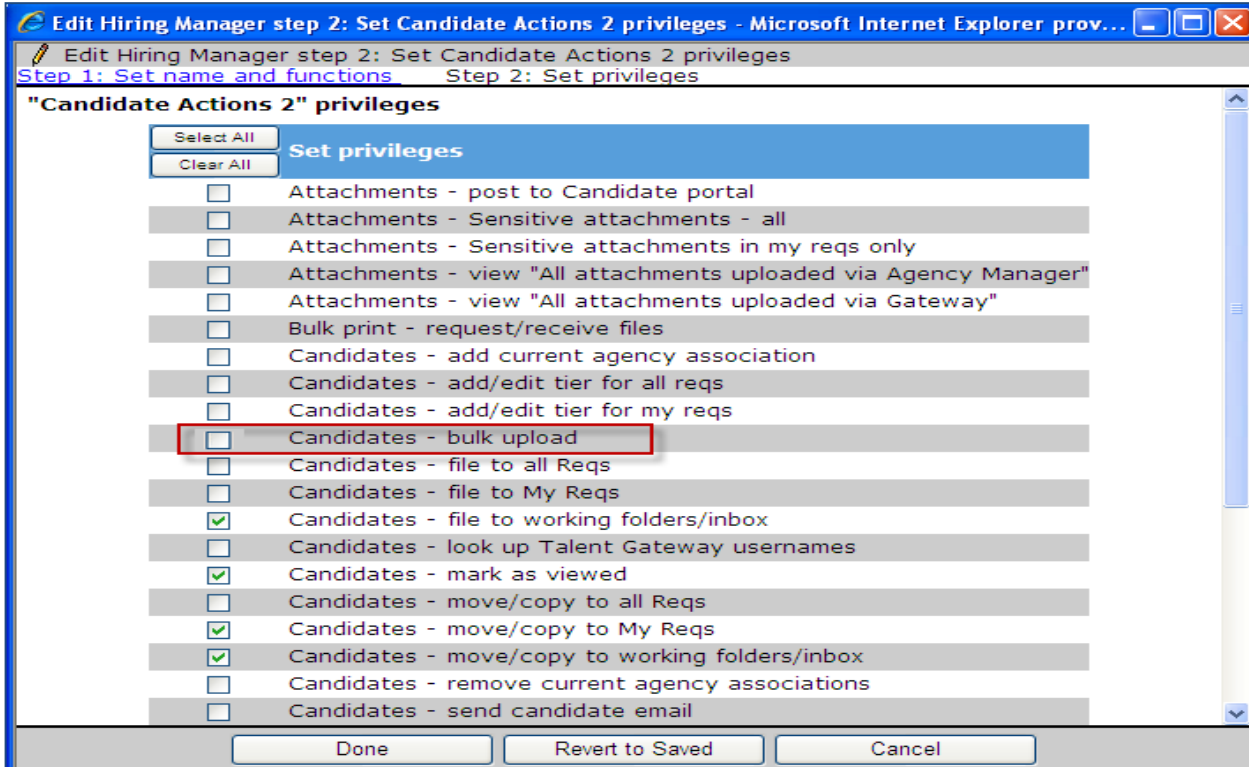
How Do Clients Get this Feature?

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

Workbench Self-Service Certified Users

To enable this feature for a user type, provide the user type with the new Candidate Actions 2 privilege, **Candidates – bulk upload**.

Tools > Users > User Types > select user type > Edit Type Permissions > Candidate Actions 2



2xB users with this user type privileges see the new **Add multiple candidates** action on the Add Candidate page in 2xB.

This feature uses the stacking logic configured for Remote Recruiter in Workbench. Hence, if the data of a candidate being uploaded matches with the data of an existing candidate, both the candidates' records are stacked.

Candidates – “Move and Copy to Req” Defaults

Your organization can now choose the default action selection (Move or Copy) for “Move/Copy to req” or “Move/Copy to folder” functionality. Previously it has always defaulted to “copy.” You can also set the default option selection concerning whether to retain HR status data for a move or copy, and if retaining, which date to use. Previously the default selection has been “Do not retain HR status data.”

Product RDP594 Release 13.1	⌋ 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

Your organization can now choose the default action selection (Move or Copy) for “Move/Copy Candidates” to req or working folders functionality. Previously the default selection for users has always been “Copy.”

You can also set the default option concerning whether to retain HR status data for a move or copy action:

- “**Do not retain HR status data**” (which has been the default selection when users move or copy candidates to req or working folders)
- “**Retain the HR status data**” with the **current date of action** when candidates are moved or copied.
- “**Retain the HR status data**” with the **original HR status date** when candidates are moved or copied

2xB User Experience

When these defaults are enabled for your account, you still retain the ability to manually choose the other action on the Move/Copy page (when selecting candidates in a folder and choosing **Move/Copy to req** or **Move/Copy to folder** action).

Copy candidates to folder - Microsoft Internet Explorer provided by Kenexa Technology Inc... Help

Selected candidates: 2

Action Move Copy

(Removes these candidates from this folder and places them into the destination folder.) (Candidates remain in this folder but are also added to the destination folder.)

* Destination

User Inbox

HR status options

Retain the HR status data (including history) of all candidates in this folder when entered into the destination folder.

Do not retain any HR status data for these candidates from this folder in the destination folder.

E-mail all users with this candidate active

* = required field

You can also manually change HR status options when moving or copying candidates to a folder. However, if you choose to retain the data, the date used –date of the move/copy or original HR status date– depends on the option chosen for the **Default action for Move/Copy to Req – HR status retention** client setting.

How Do Clients Get this Feature?

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

Kenexa Tasks

Two new client settings are available for this feature.

Workbench

Admin>Manage Clients>Edit client settings

New client settings are:

Default action for Move/Copy Candidates to Req

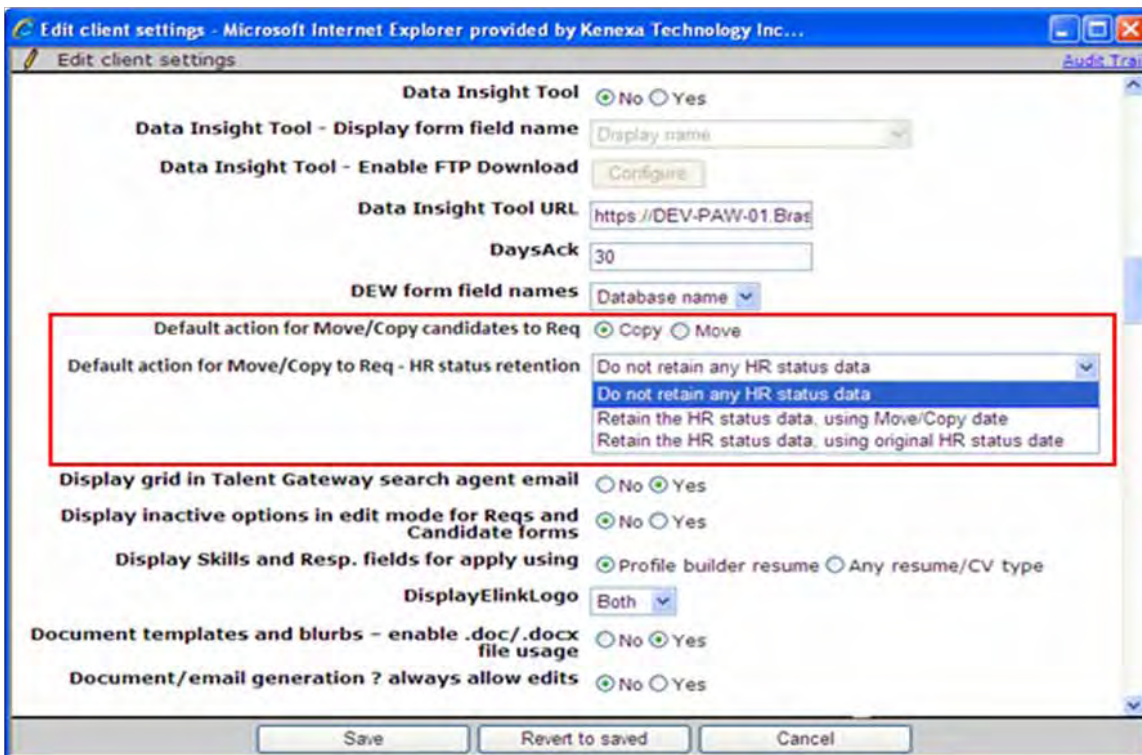
Sets the default action value for Move/Copy functionality to Req or Working folders, and has these options:

- Copy
- Move

Default action for Move/Copy to Req – HR status retention

Sets the default action concerning whether to retain HR Status data when user use Move/Copy functionality, and has these options:

- Do not retain any HR status data
- Retain the HR status data, using Move/Copy date
- Retain the HR status data, using original HR status date



Communications – Agency Contact Merge Tokens

This feature introduces two new Agency Contact merge tokens, Agency First Name and Agency Last Name, representing the first and last name of an agency's contact person. Agency Contact merge tokens are available for use in email templates and blurbs when sending agency communications.

Product	<ul style="list-style-type: none"> 2x BrassRing Agency Manager
Release 13.1 RDP 552	
Visible Changes	<ul style="list-style-type: none"> No – requires specific conditions / configuration for visibility..
How do I get this feature?	<ul style="list-style-type: none"> Configuration required – contact your Kenexa Support Team for implementation details.

Feature Description

This feature introduces two new merge tokens representing the Agency Contact person's first and last name. The two new Agency Contact merge tokens are;

- Agency First Name - [#Agency Contact-info:FirstName#]
- Agency Last Name - [#Agency Contact-info:LastName#]

2xB template administrators can now use these Agency merge tokens when creating email templates and blurb for agency communications.

2xB User Experience

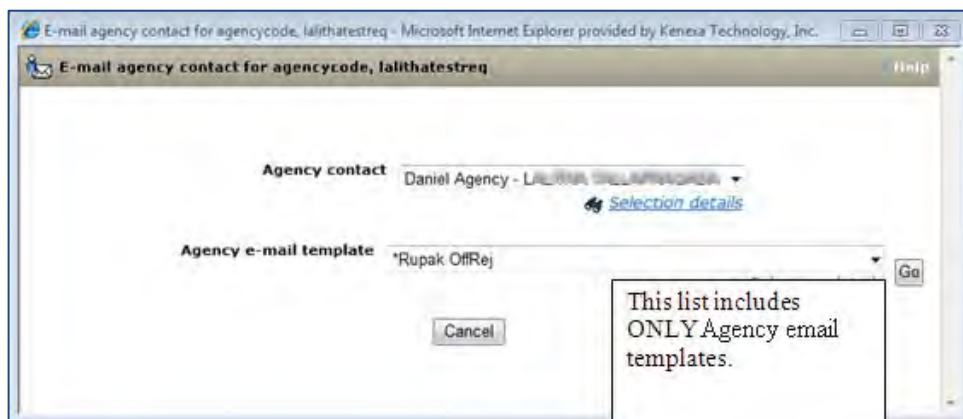
Once template administrators incorporate the new merge tokens into the email templates, 2xB users can begin using them.

1. Select an agency-referred candidate and clicks Email agency contact in the Actions menu.



2. Select an Agency contact from the list. (In order to be saved as Agency contacts in the system, the first name and last name must be supplied. Therefore, the first name and last name are never missing for the selected Agency Contact.)

3. Select Agency template containing the Agency Contact first and last name.



In the generated email, the Agency Contact first name and Agency Contact last name tokens resolve to the Agency Contact person's first and last name. The Candidate first name and Candidate last name resolve to their correct first and last names as well.

4. Click **Send**.
The communication is sent to the Agency contact represented by the merge tokens and whose email displays next to the candidate name under the Candidate and Merge Information section.

Limitations and Known Issues

Agency Contact merge tokens are only available for use in Agency Communications. They are not available for use in document templates and no additional Agency tokens are available at this time.

How Do Clients Get this Feature?

This feature is controlled by a new client setting. Please refer to the following configuration options:

For Clients New to Using Agency Email Templates and Blurbs

For clients new to using Agency Email templates and blurbs, the client setting is enabled to **Yes** by default and the Agency Contact merge tokens are available for use.

For Clients Currently Using Agency Email Templates and Blurbs

For clients currently using Candidate First Name and Last Name merge tokens in Agency Email templates and blurbs, the client setting is set to **No**.

Clients who elect to use this new feature will have to update their email templates to reflect the correct merge token usage as supported in this new feature. Therefore, we **strongly recommend** clients locate email templates with the following attributes:

- Locate templates designated as Agency templates AND that contain one or both of Candidate first name or Candidate last name merge field tokens [#Contact-info:FirstName#] and [#Contact-info:LastName#].
- Inactivate these templates on the Communications: E-mail templates page in 2x BrassRing.
- Contact your Kenexa Support Team to change the client setting from NO to YES.
- Update the inactivated templates with the new Agency tokens OR create new templates using the Agency tokens.
- Reactivate the updated templates (new templates would already be active.).

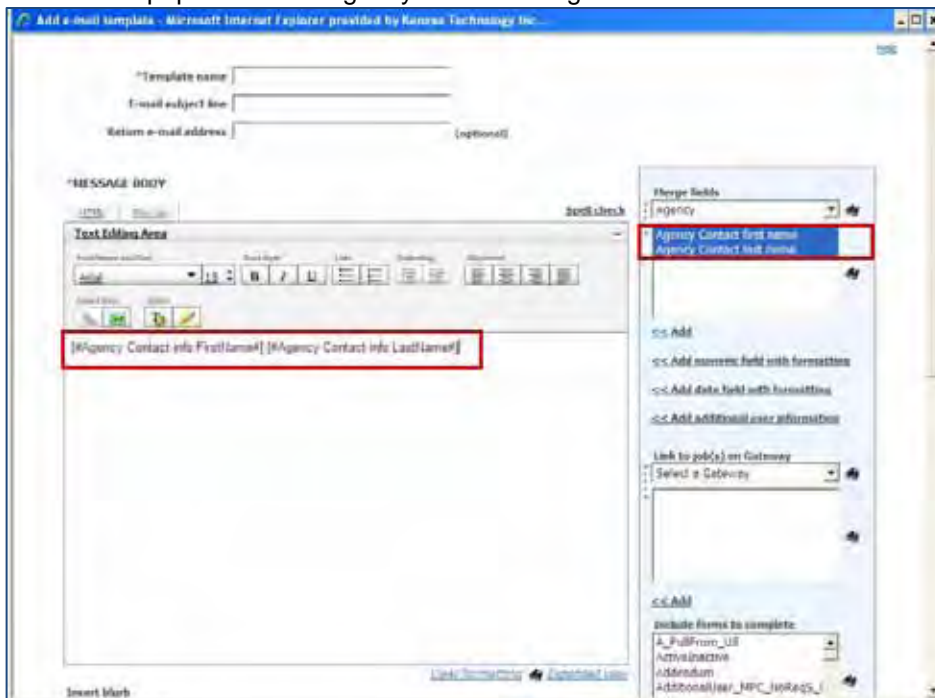
2x BrassRing Admin/Admin+ Users

When this feature is enabled, 2xB template administrators can incorporate the Agency Contact First Name and Agency Contact Last Name merge tokens into Agency email templates and blurbs. 2xB users can then access the Agency email templates and blurbs when sending communication to agency contacts.

Configuring Agency Contact Merge Tokens in Blurbs and Email Templates

2xB administrators create blurbs and templates using the Agency Contact merge tokens. Both blurbs and templates can contain Agency Contact merge tokens.

1. **Admin > Communications > Email templates.**
2. Click **Add email template.**
Complete required email template fields.
 - Template name
 - Email subject line
 - Return email address (optional)
 - Compose message in Text Editing Area.
3. Select **Agency** variable group in the Merge fields drop-down menu.
The list box populates with Agency Contact merge tokens.



4. Select the Agency Contact merge tokens from list box.
5. Click **Add** to insert the Agency Contact merge tokens into the text editing area where desired.
6. Select the **Yes** radio button to set the template type to Agency.
7. Complete the remaining email template fields, required and non-required.
8. Click **Save**.

Kenexa Tasks

Workbench

For Clients New to Using Agency Email Templates and Blurbs

For clients new to using Agency Email templates and blurbs, the client setting is enabled to Yes by default and the Agency Contact merge tokens are available for use.

For Clients Currently Using Agency Email Templates and Blurbs

For clients currently using Candidate First and Last Name merge tokens in Agency Email templates and blurbs, the client setting is set to No. It is recommended that these clients follow the instructions outlined in [For Clients Currently Using Agency Email Templates and Blurbs](#) and then enabling the client setting to Yes.

In WB:

Admin > Manage Clients > Edit

Select **Yes** for **Enable Agency merge fields in blurbs and email templates**

Edit client settings - Windows Internet Explorer

Edit client settings [Audit Trail](#)

Email Notification - move/copy/file to folder or req (& integration update to HR status) No Yes

Email tokens - enable Order ID in 2xB No Yes

Enable additional user information merge fields No Yes

Enable Agency merge fields in blurbs and e-mail templates Yes No

Enable AKAMAI for SAML No Yes

Enable candidate purge No Yes

Enable candidate purge preview report No Yes

Enable candidate stacking field No Yes

Enable Clear Formatting with text editor No Yes

Enable confirmation emails for the following actions

Candidate - eLink blank form

Candidate - eLink form to view/edit/approve

Save Revert to saved Cancel

Communications – Capturing SMS Messaging Consent

This feature allows clients to require candidates to explicitly consent to receive text messages [also known as Short Message Service (SMS) messages] when creating or updating their profiles on a Talent Gateway (TG) or through a Gateway Questionnaire (GQ). Candidates can also revoke text message consent at any time.


Product	<ul style="list-style-type: none"> ▫ 2x BrassRing ▫ Talent Gateway
Release 13.1 LDP 114	<ul style="list-style-type: none"> ▫ Workbench Self-Service
Visible Changes	<ul style="list-style-type: none"> ▫ No – requires specific conditions / configuration for visibility...
How do I get this feature?	<ul style="list-style-type: none"> ▫ Configuration required – contact your Kenexa Support Team for implementation details.


Feature Description

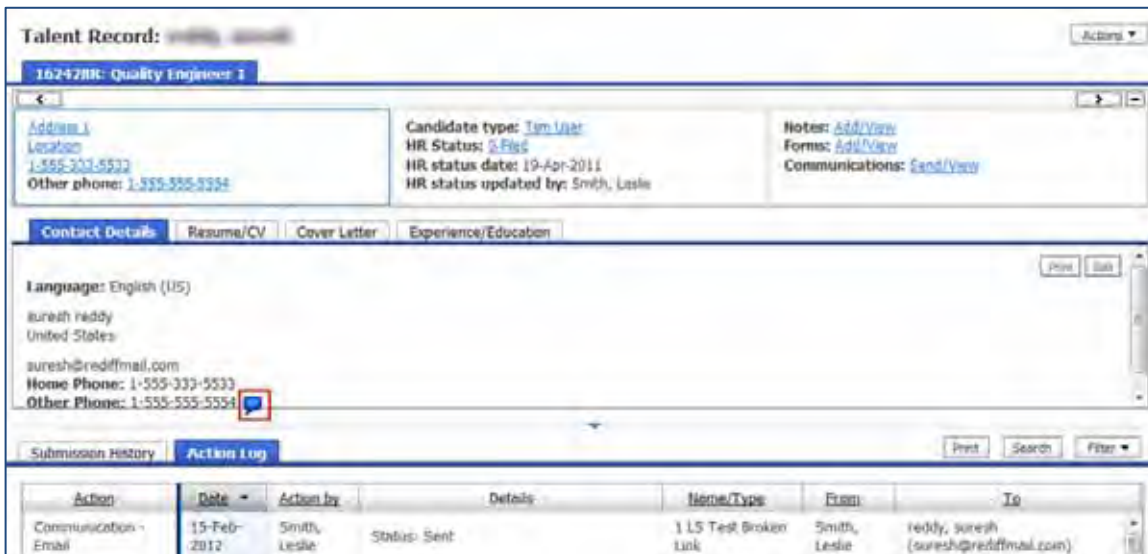
This feature allows clients who have enabled SMS messaging to require candidates to explicitly consent to receive text/SMS messages when creating or updating their profiles on a Talent Gateway or through a Gateway Questionnaire. The feature consists of a consent check box near the Other phone (i.e. mobile) field and a pop-up message that describes the consent policy and the consent removal procedure. Both the consent checkbox label and consent pop-up message are configurable in Workbench.

When a candidate checks the ‘consent’ checkbox (either on the Edit profile page of the Talent Gateway, or on a Gateway Questionnaire page), the configurable pop-up message launches immediately with all the consent policy information and the instructions to remove consent and stop receiving messages. The candidate can use browser functionality to print it out if desired. Upon checking the ‘consent’ checkbox, the Other phone (i.e. mobile) field becomes required. The candidate must enter a valid mobile phone number in this field to save the page (and to receive text/SMS messages).

Candidates can also remove consent to receive text/SMS messages at any time by logging in to the TG or GQ and unchecking the ‘consent’ checkbox.

Within 2x BrassRing, when the candidates consent to receive text/SMS messages, the small blue message icon  displays to the right of the phone number in the ‘Other phone (i.e. mobile)’ field on the Talent Record Contact Details page.

 Note that this field might have a custom label such as ‘Mobile phone number’. If the candidate removes consent by updating his or her profile through the TG or GQ, the message icon disappears on the candidate’s Talent Record.





The Contact Details section displays by default. If you do not see this Tab/Section, refer to Workbench Self-Service Certified Users section for configuration instructions. If you do not see the blue icon next to the candidate's Other Phone field, the candidate has not checked the consent checkbox.

Only candidates can **give** consent to receive text/SMS messages. 2xB users can change a candidate's consent choice to No on the Edit candidate's overview page, but cannot change the setting to Yes to grant permission.

Candidates can revoke consent in the following ways:

- Candidate sends a response message of STOP to client's text message. Mobile providers should honor the STOP request. However, this does not remove the candidate consent within 2x BrassRing.
- Candidate logs into TG/GQ and unchecks the consent checkbox and saves their updated profile. This is Kenexa's preferred method.
- 2x BrassRing users can remove consent if necessary by accessing the Edit candidate overview page.



Kenexa recommends that clients arrange with their service providers to get nightly logs of 'STOP' requests and assign an Admin+ user the task of removing consent from each corresponding candidate profile.

Candidate Experience

With the feature enabled, when candidates create new accounts or log into their existing TG accounts, they have the option to check the 'consent' checkbox to receive text/SMS messages. Candidates are not required to give consent, of course. If they do check the box, they must enter a valid mobile phone number in the Other phone (i.e. mobile) field.

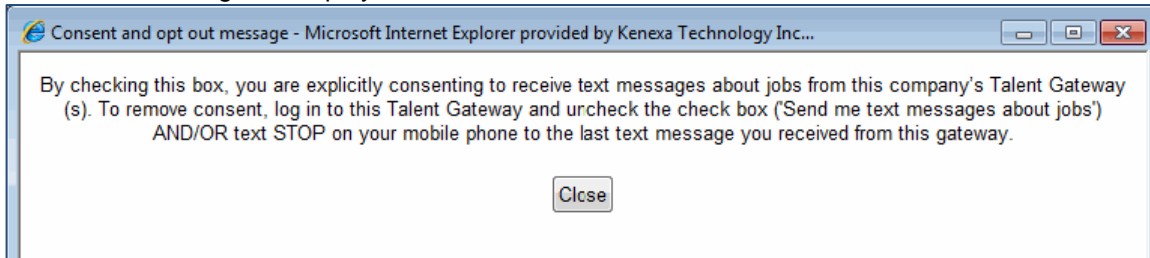
On a TG:

1. Candidate logs into a TG.
2. Candidate clicks **Edit your profile**.

The edit profile dialog box displays:

3. Candidate completes or edits profile information.
4. Candidate enters their mobile phone number in the **Other Phone** field and selects the checkbox for **Send me text messages about jobs**.

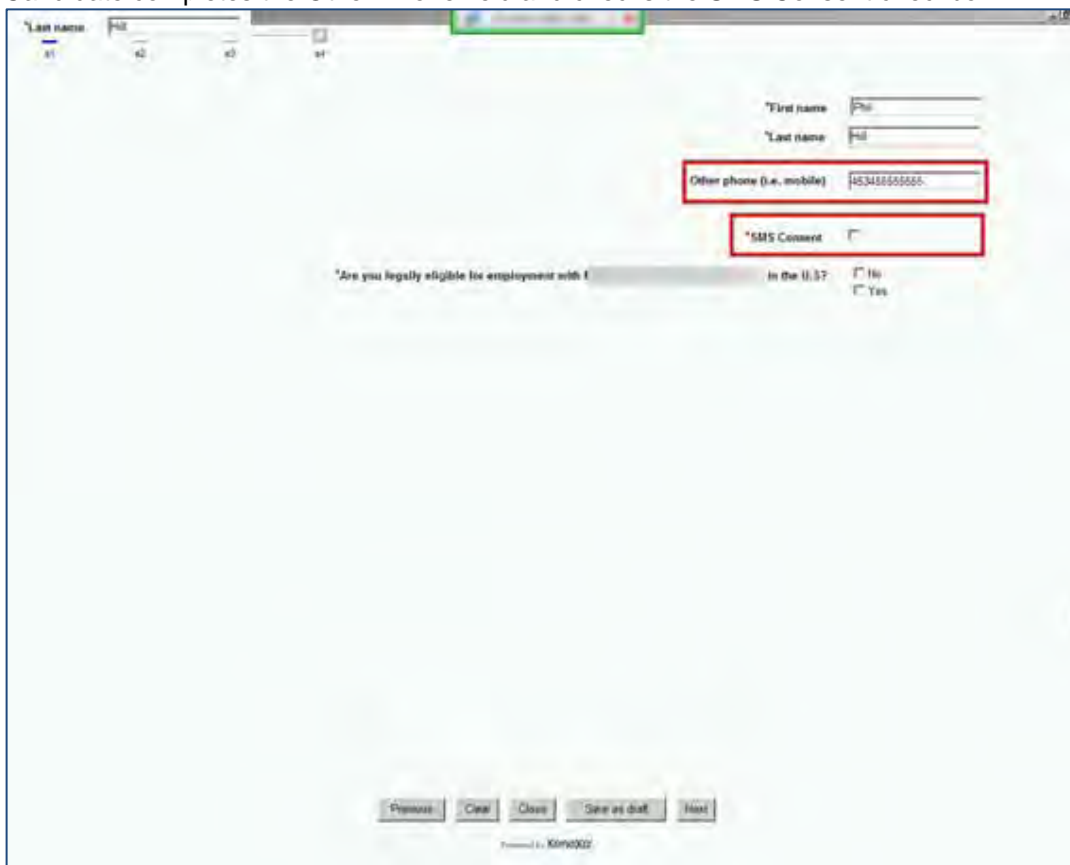
Confirmation dialog box displays.



5. Candidate clicks **Close**.
6. Candidate clicks **Save**.

On a GQ:

1. Candidate logs into a TG and begins completing a GQ.
2. Candidate completes the Other Phone field and checks the SMS Consent checkbox.



3. Candidate clicks **Next** and completes the GQ.
4. Candidate **submits** GQ and consent settings are saved to the candidate's profile.

2x BrassRing User Experience

When this feature is enabled and candidates have consented to receive SMS text messages, [the blue SMS text message icon](#) displays next to the Other phone field in the Contact Details section and indicates that 2xB users can send SMS text message to candidates.

In 2xB:

1. In a req folder, select a candidate.

- Click **Send candidate as hoc SMS**.
The Send SMS Message dialog box displays.

Candidate SMS Message ? Help

* **To (mobile phone number)** 6175552355

From sms@kenexa.com

* **Your SMS Message**

* = required field

Number of characters(plus spaces): 0

Send Clear Cancel

- Enter SMS message in the **Your SMS Message** text box.
- Click **Send**.
SMS Message is sent to candidate and a confirmation dialog box displays.

Candidate SMS sent ? Help

The Candidate SMS has been sent to the following candidate(s):
Josephine Reynolds

Close

- Click **Close**.
A record of the sent SMS message is stored in the candidate's TR action log.

Language: English (US)
Josephine Reynolds
42 Main St
Apt #29
Boston, Massachusetts 02111
United States

Submission History **Action Log**

Action	Date	Action by	Details	Name/Type
Communication - SMS	01-Jun-2012	HRUSER	Status: Sent	Ad hoc SMS This is a test.
Form Edited	11-May-2012	Submission, System (HRUSER)	Form ID: 191527	TG Integration form (for SSO)
Form Added	11-May-2012	Submission, System (HRUSER)	Form ID: 191527	TG Integration form (for SSO)

Best Practice Recommendations

Clients MUST craft and enter a 'Consent and opt out message' that is legally appropriate for their jurisdiction. It should include (but not be limited to) information such as informing the candidate that he or she is explicitly consenting to receive text messages by checking the box, the 'consent' policy of the organization, how the organization will use the mobile phone number, and the methods for stopping receiving text messages, and so forth.

Limitations and Known Issues

Capturing SMS Message Consent functionality is not available on Referral Gateways.

STOP requests to mobile providers to receive text/SMS messages are not under the control of Kenexa and are not routed to our SMPP server. We recommend that clients take the responsibility to make arrangements with their mobile vendors to receive nightly logs containing candidates "STOP" text messages revoking consent. Clients can monitor these nightly logs and change consent settings for candidates who no longer wish to receive SMS messages.

How Do Clients Get this Feature?

Clients must have SMS messaging enabled and configured in general for this feature to be available for use. This feature is controlled by a new client setting, a user privilege, and text customization of the candidate consent messages for TG account profiles and GQs. In addition, if clients wish to use SMS consent message on GQs, they must configure GQ widgets to display consent labels and messages. Please contact your Kenexa Support Team for more information about enabling this feature.

Workbench Self-Service Certified Users

If clients want to have ability display SMS consent requests on a TG profile, they must:

- add a new user privilege to allow 2xB users to access the Send Candidate Ad-hoc Message action and to display the blue SMS message icon
- enter the consent message label text and consent message text (for pop-up message) in the TG text customization page.

If clients want to display SMS consent requests on GQs, they must:

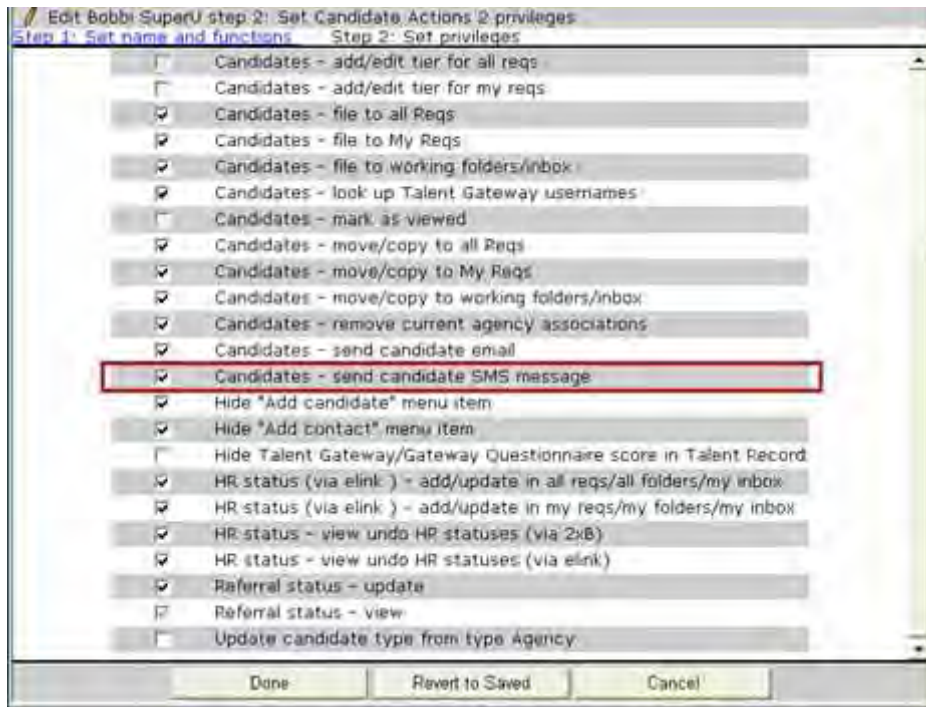
- add a new user privilege to allow 2xB users to access the Send Candidate Ad-hoc Message action
- enter the consent message label text and consent message text (for pop-up message) in the TG text customization page.
- configure two GQ widgets (one to display the consent label and one to display the consent pop-up message text).



The client setting to enable SMS messaging must be enabled before the user privilege can be checked.

User Privilege

1. **Tools > Users > User Types.> Edit type permissions > Candidate Actions 2.**
The Set name and functions screen displays.
2. Click the pencil icon for **Candidate Actions 2.**
The Candidate Actions 2 dialog box displays.



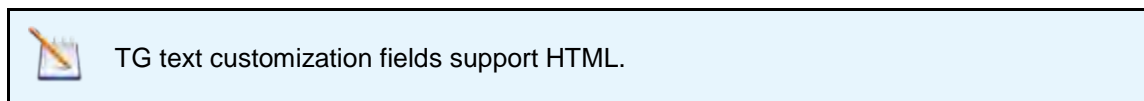
3. Select the checkbox for **Candidate – Send candidate ad-hoc SMS message**.
4. Click **Done**.
5. Click **Save**.

TG Text Customization

The SMS consent message label and consent message are configured on the TG. Clients can use the default label for the 'consent' checkbox or create a custom label. Clients **MUST** configure a legal and appropriate 'Candidate consent pop-up message' for their jurisdiction.

Candidates who apply are presented with the consent checkbox (with either the default or customized label) and with the customized 'Candidate consent pop-up message' when they check the 'consent' checkbox.

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



2. Click the **Edit Text Customization** icon for your TG.



3. Scroll to the **Edit Profile** tab.

Customization for FTG [View Test](#)

Landing Landing logged in Create login Log in Progress bar Titles Gateway Questionnaire log in / create Profile source Profile builder Edit profile Search openings Search results

Edit profile page

Edit profile intro text: Update or review your login, contact information, education, and work experience. You can also update additional information like new skills and responsibilities you may have acquired and want us to know about. [Show me](#)

Display on Gateway: [Show me](#)

Candidate self-delete warning message text: You are about to delete your registration data on all our career sites. Are you sure you want to remove your entire profile, including all saved data, from our career sites? [Show me](#)

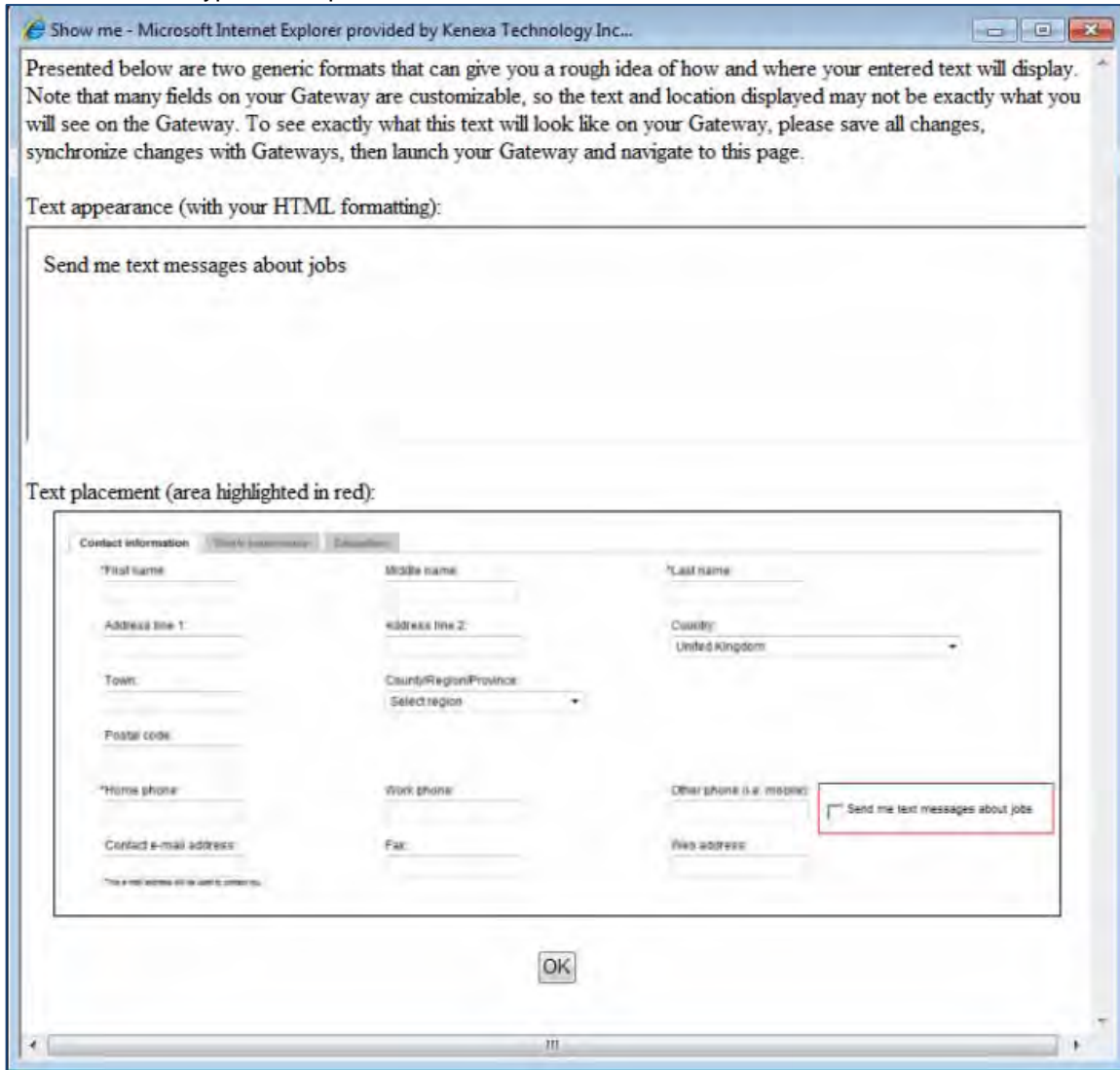
SMS messaging - candidate consent checkbox label: Send me text messages about jobs [Show me](#)

SMS messaging - candidate consent pop-up message: By checking this box, you are explicitly consenting to receive text messages about jobs from this company's Talent Gateway(s). [Show me](#)

Save Reset to Saved Cancel

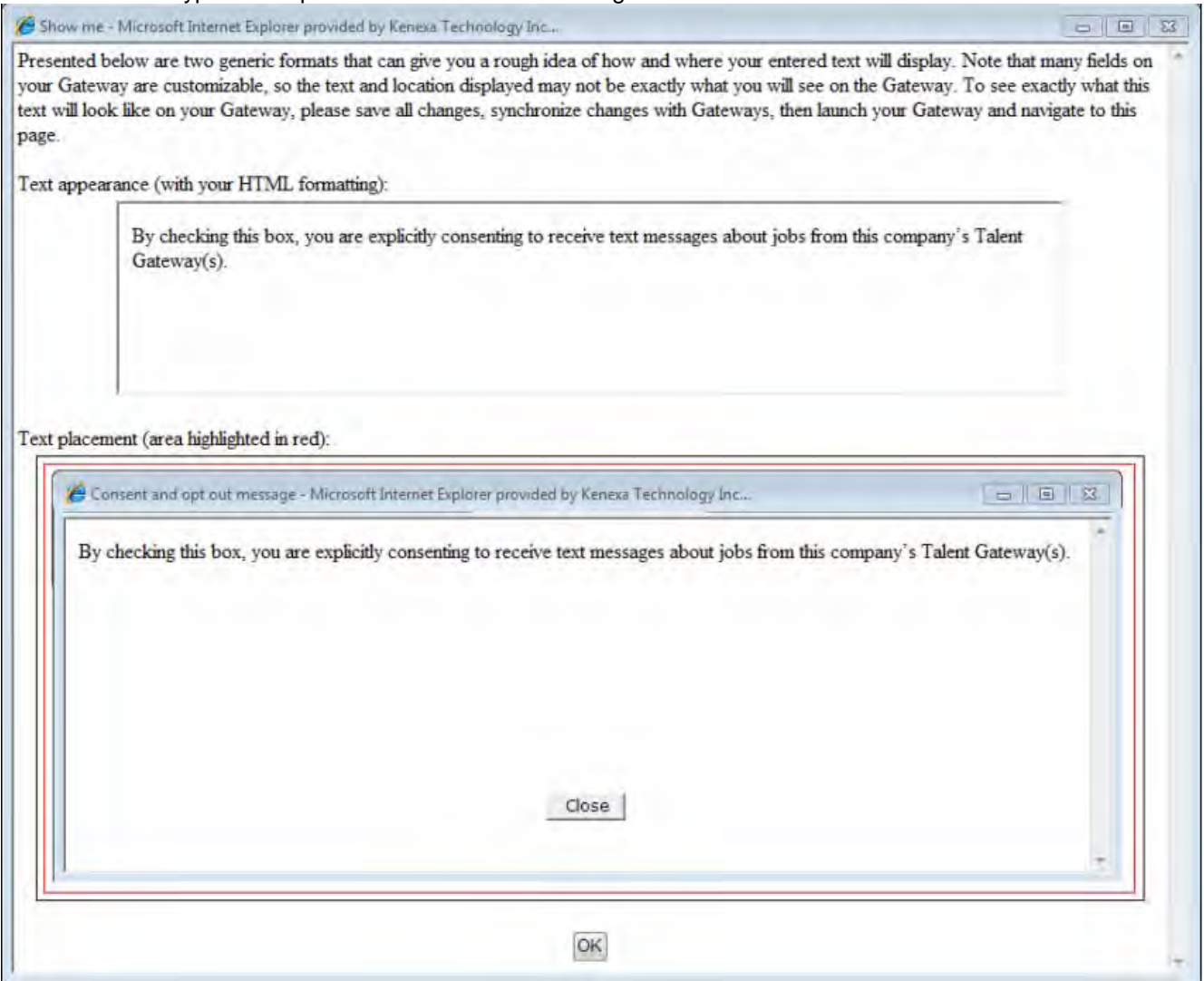
4. Enter label text for the **SMS messaging – candidate consent checkbox label**.
5. Enter the consent pop-up message crafted by the client’s legal department into the ‘SMS messaging – candidate consent pop-up message’ text area. This step is mandatory.

6. Click **Show me** hyperlink to preview the SMS checkbox label.



7. Enter text for consent pop-up message for **SMS messaging – candidate consent pop-up message**.

8. Click **Show me** hyperlink to preview SMS consent message.



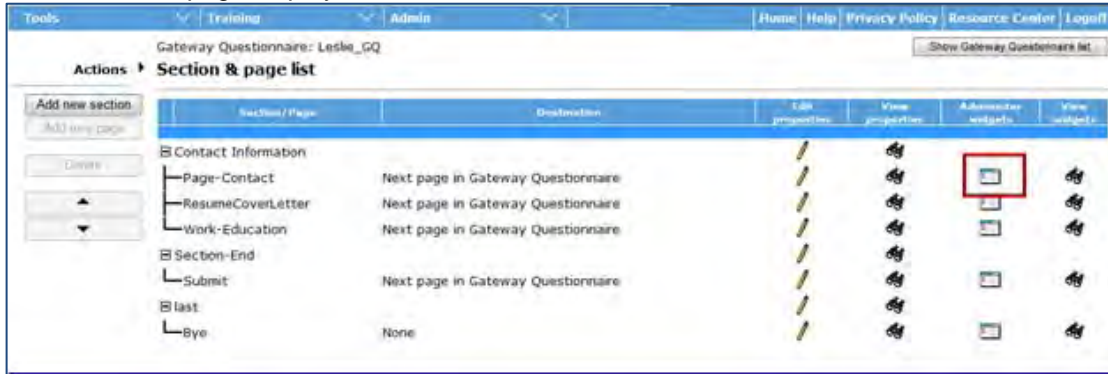
9. Click **Close**.
10. Click **OK**.
11. Click **Save**.

Gateway Questionnaire

To use the SMS consent functionality in conjunction with gateway questionnaires, you must configure GQ widgets in addition to configuring the user privilege settings and message text customization for the SMS consent labels and SMS consent message. Once configured, GQ widgets display the consent labels and consent message defined in the TG text customization.

1. **Tools > Gateway Questionnaire**.
2. Create a new GQ or select an existing GQ. Complete all fields on the GQ.

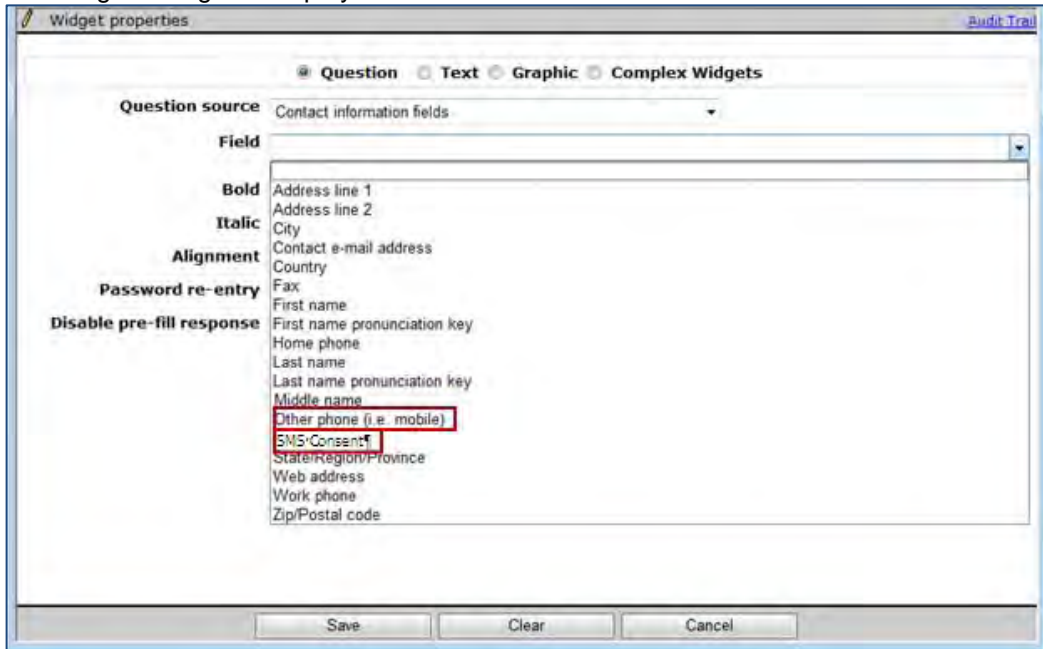
3. Click **Administer Section/Pages**.
The administer page displays.



4. Select a page or add new one and click **Administer Widgets**.
The Administer Widgets page displays.



5. Select **Add a New Widget**.
The widget dialog box displays.



6. Select **Contact Information Fields** in the Question Source list box.
7. Select **Other phone (i.e., mobile)** from the list drop-down.

The screenshot shows the 'Widget properties' dialog box with the following settings:

- Question source:** Contact information fields
- Field:** Other phone (i.e. mobile)
- Buttons:** Clear all labels, Load labels from source
- Custom label:** [English - United States]
- Inherited/Required:** Inherited (selected)
- Display option:** Field name (selected)
- Formatting:** Bold (checked), Italic (unchecked)
- Alignment:** Default (selected), Left, Center, Right
- Other options:** Password re-entry (unchecked), Disable pre-fill response (unchecked)
- Buttons:** Save, Clear, Cancel

Complete the following widget property fields:

- Custom Label
- Inherited
- Display option
- Select Bold/Unbold
- Select Page alignment
- Leave Disable pre-fill response unchecked

8. Click **Save**.
9. Repeat [Step 4](#) through [Step 8](#) to add a new page and new widget for SMS consent checkbox.

You must add the SMS consent checkbox widget to the same GQ page as the Other phone (i.e. mobile) widget to save the GQ.

Kenexa strongly recommends that the consent checkbox widget be added to the GQ page followed immediately by the Other phone (i.e. mobile) widget so that candidates see them as related.

Talent Record – Restoring Talent Record Contact Details Page Defaults

Use this procedure to return the Talent Record Contact Details section of the Talent Record to the default display (if necessary).

1. **Tools > Users > User Types > [select user type] > Screen Display Defaults.**

The screenshot shows the 'User types' management page. On the left, there is a list of actions: 'Add new user type', 'Export master privilege list to Excel', 'Save usertype as new', 'User type panel mapping', 'Screen display defaults' (highlighted with a red box), and 'Configure custom help'. On the right, a table lists user types. The first entry is 'Leslie_SuperUser_NewUI', which is selected. The table has columns for 'Select', 'Usertype name', 'View users and type details', and 'Edit type permissions'.

Select	Usertype name	View users and type details	Edit type permissions
<input checked="" type="radio"/>	Leslie_SuperUser_NewUI		

2. Select the checkbox for **Contact Details** and any other desired display options.

The screenshot shows the 'Edit screen display defaults' dialog box for the 'Hiring Manager' user type. It features a 'Resume/CV Section' with a table of display options. The 'Contact Details' checkbox is checked. Below the table, there is a section to 'Apply this configuration to other User Types' with a dropdown menu showing 'Snow New UI', 'Sunny New UI', 'Super User', and 'Test New Usertype'. At the bottom, there are 'Save', 'Reset to default', and 'Cancel' buttons.

Tab Name	Display	Default
Contact Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Resume/CV	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cover Letter	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Experience/Education	<input checked="" type="checkbox"/>	<input type="checkbox"/>

3. Click **Save**.

Kenexa Tasks

This feature is controlled by a new client setting. This new client setting and associated functionality is dependent upon the prior enabling of SMS messaging – enable, the configuration of SMS messaging ‘From’ address, and the configuration and testing of the mobile vendors messaging system with Kenexa’s SMPP server.

Workbench

1. **WB>Admin>Manage Clients>Edit client settings** or click the pencil icon for your client.
The client setting dialog box displays.

The screenshot shows the 'Edit client settings' dialog box with the following settings:

- Recruiter/ User signature image tokens: No Yes
- Secure Candidates: No Yes
- Secure Reqs: No Yes
- Security level for 2xB: Default
- Security level for Agency Manager: Default
- Security level for Talent Gateways: Default
- Security level for Workbench: Default
- SMS messaging - enable: No Yes
- SMS messaging 'From' address: sms@companyname.com
- SMS messaging - require candidate consent: No Yes
- Work Opportunity Tax Credit Integration: No Yes

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

2. Select the **Yes** radio button for ‘**SMS messaging – require candidate consent.**’
3. Click **Save**.

Communications – Customized Email Merge Token

This feature introduces a customized email address merge token used to send email recommendation requests for candidates. When this feature is enabled, 2xB users can use customized merge tokens in email templates to send reference forms to recommenders.

Product	↳ 2x BrassRing	↳ Talent Gateways
Release 13.1 RDP592		
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 this feature is enabled, 2xB users can use a customized email address merge token in email templates to send reference forms to recommenders specified by candidates. For example, if a candidate enters a reference's email address on a candidate form or on a Gateway Questionnaire (GQ), this form field token of email type can be included in the email template. At documentation generation, the email token type is resolved to each candidate's recommender's email address. Recruiters can also input recommender's email addresses when adding forms to a candidate's Talent Record.

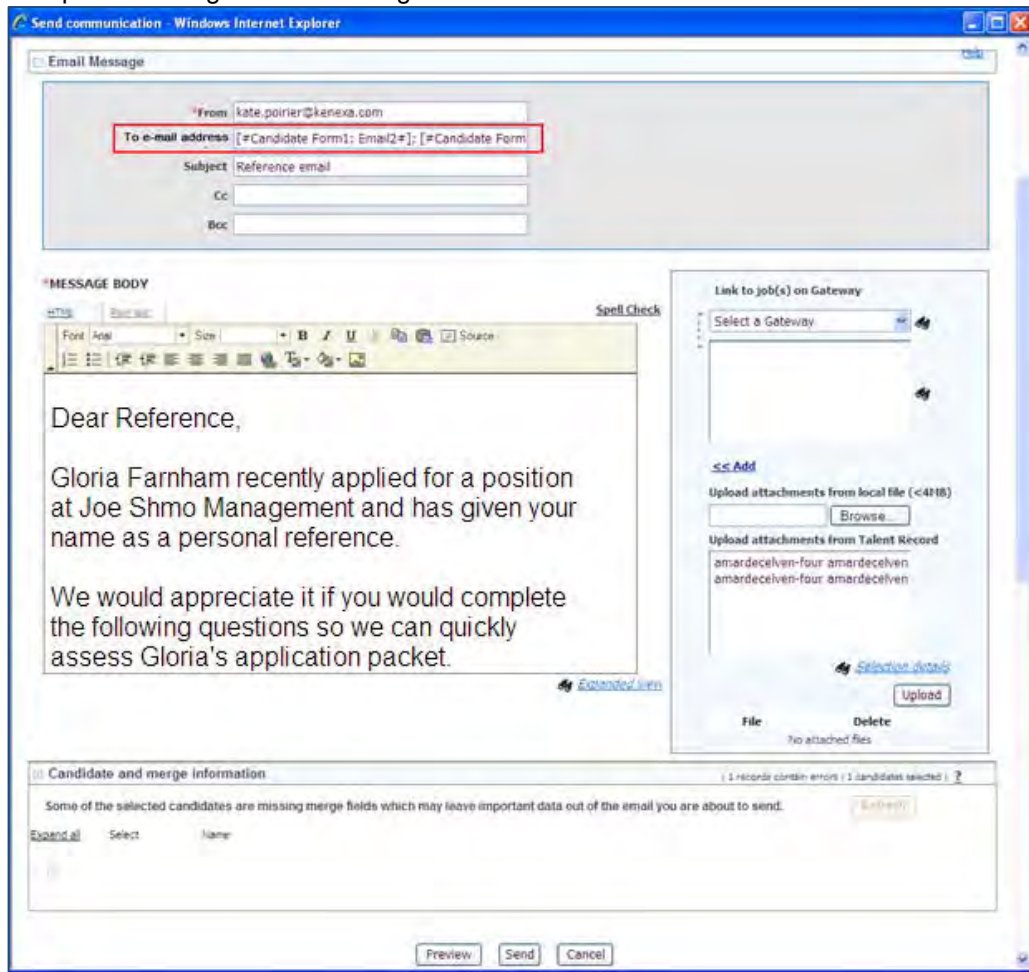
2x BrassRing User Experience

When 2xB administrators have configured email templates containing the customized merge tokens, 2xB users can use these email templates to send email to a candidate's references.


In a req folder in 2xB:

1. Select a candidate and click **Send Communications**.
2. Select an email template.
3. Click **Go**.
Email template displays with candidate's **To email address** email token.
4. Complete required email template fields.
 - Email subject line
 - Carbon copy email address (optional)
 - Blind Carbon Copy email address (optional)

Compose message in Text Editing Area



5. (Optional) Click **Preview**.



Preview does not display resolved merge tokens. The **To email address** email token resolves at document generation.

6. Click **Send**.

Limitations and Known Issues

- This feature is not available for Agency Manager email templates.
- The View relationships functionality is not supported for this feature.
- If Rules Automation Manager (RAM) is used in conjunction with this feature, the RAM trigger **must** include the same email recipient(s) as configured for the "To email address" field. If it is not, the RAM trigger overwrites the To email address field.

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.

2x BrassRing Admin/Admin+ Users

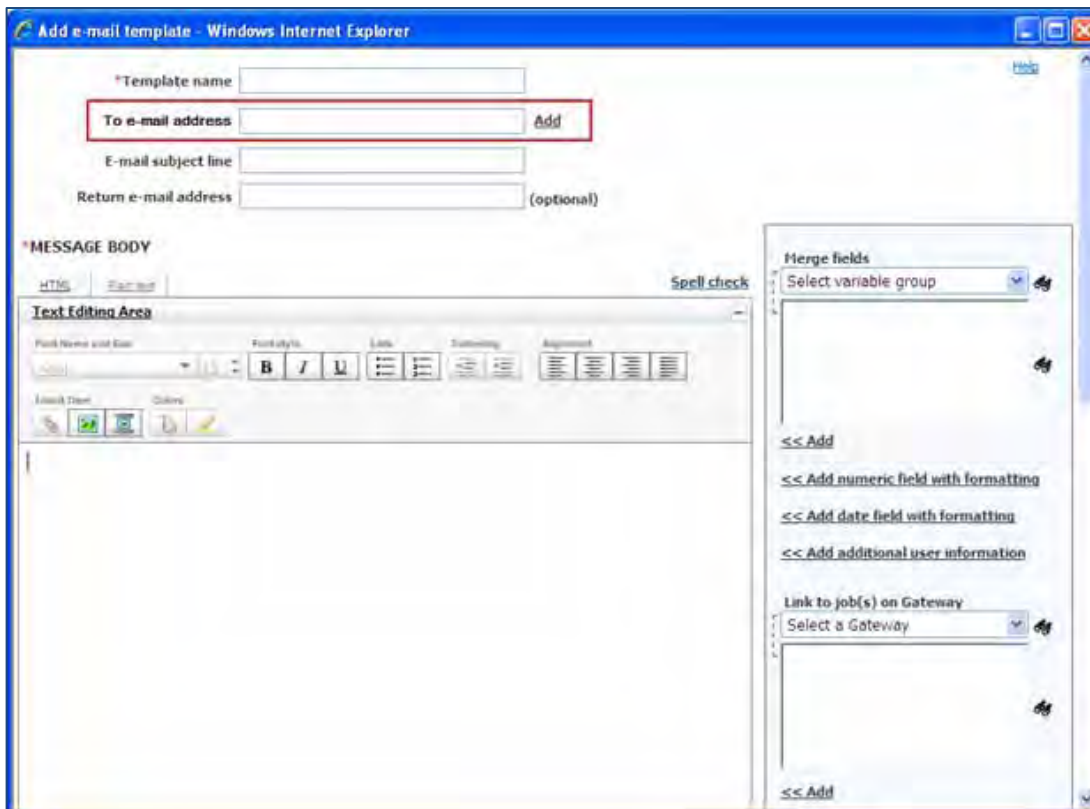
When this feature is enabled, 2xB template administrators can create email templates containing the customized email token. 2xB users can then access the email templates and customized email tokens when sending communication to a candidate's references.

Configuring Customized Merge Tokens in email templates

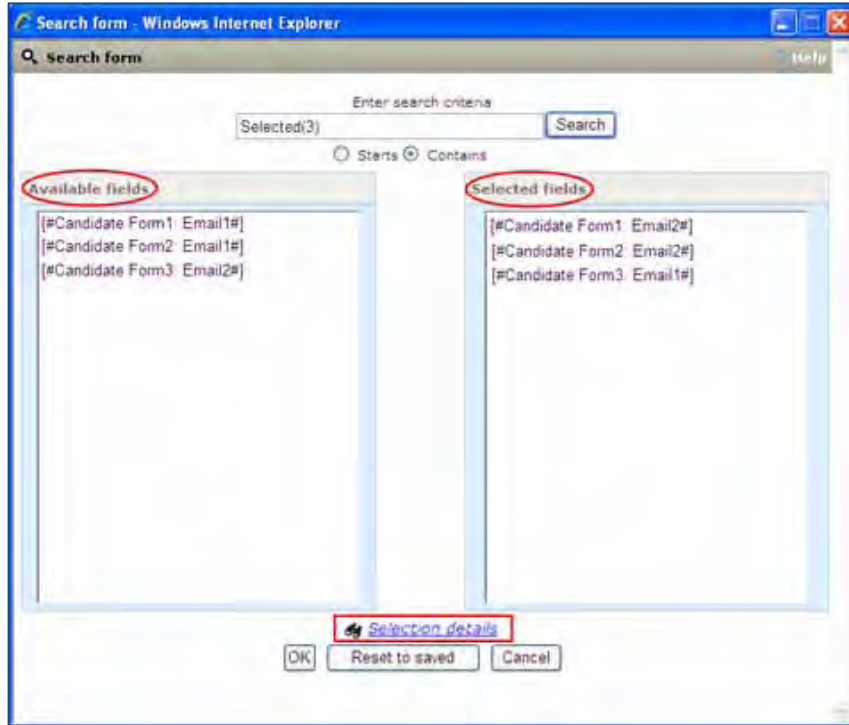
2xB administrators create email templates containing the customized merge token.

1. Admin > Communications > Add Email templates .
2. Click Add **email template**.
Complete required email template fields.

- Template name
- Email subject line
- Return email address (optional)
- Compose message in Text Editing Area



3. Click **Add** next to the **To email address** non-editable text box to access customized merge tokens. The scale select window displays.



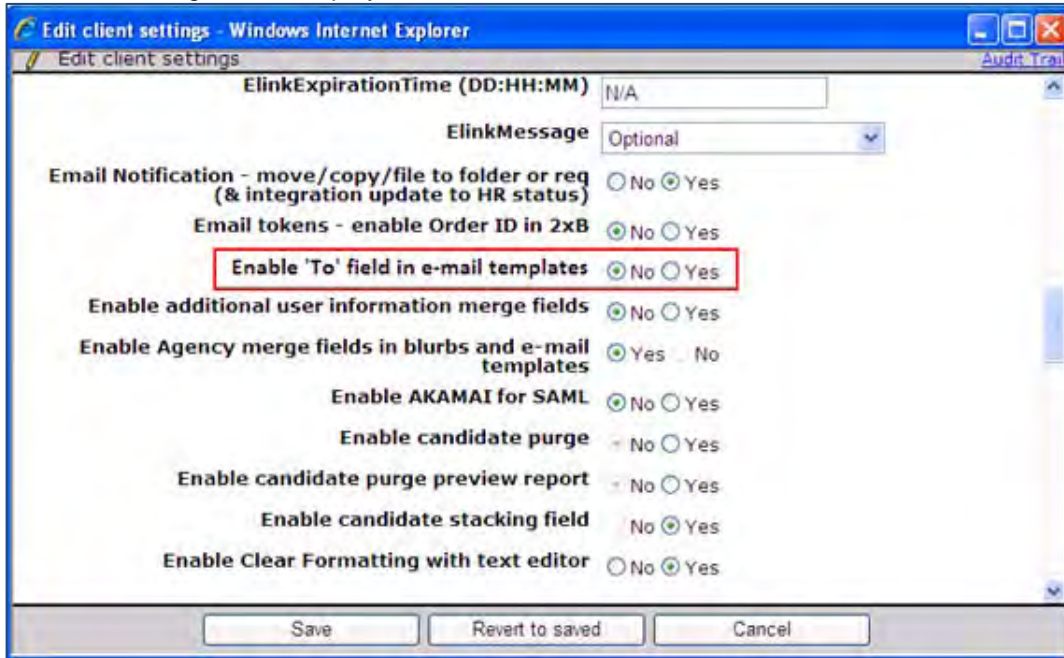
4. Click one or more merge tokens in the Available Fields list box to move it to the Selected Fields.
5. Click **OK**.
6. Complete the remaining email template fields, required and non-required.
7. Click Save.

Kenexa Tasks

This feature is controlled by a new client setting.

Workbench

1. **WB > Manage Clients > Edit Client Settings** or click the pencil icon.
WB client setting screen displays.



2. Select the **Yes** radio button for **Enable “To” field in email templates**.

Communications – Simplified Document Creation

This feature allows clients to upload and incorporate externally prepared and formatted documents (.doc and .docx) into 2xB document template and blurb workflows where uploaded documents become templates. 2xB users can then add merge tokens, set user privileges, and edit uploaded documents/templates. This feature allows clients to take advantage of rich formatting features and editing capabilities both before and after document generation and ensures a more accurate document generation preview and final document.

This new document template production and document generation method can be used alongside of the existing HTML-based document template/document generation workflow. It does not interfere with your existing blurbs and templates.

Product	⌋ 2x BrassRing
Release 13.1, LDP098	
Visible Changes	⌋ No – requires specific conditions / configuration for visibility.
How do I get this feature?	⌋ Specific conditions required – see details below.

Feature Description

This enhanced document workflow feature provides an alternative way of creating blurb and document template content for 2xB communications administrators and end-users who create the actual documents. Instead of creating the content of the blurb or document template in the HTML editor, communications administrators can upload externally prepared and formatted Word documents (any file with a .doc and .docx file type) to the Add/Edit blurb and Add/Edit document template pages. Using external functionality allows 2xB users to add branding elements, headers and footers, and merge token fields to the documents. 2xB users can then upload the formatted documents and set org level permissions, designate user type editing privileges, and set template pre-filters.

This feature supports branding and formatting capabilities, including headers and footers, available in Word documents.

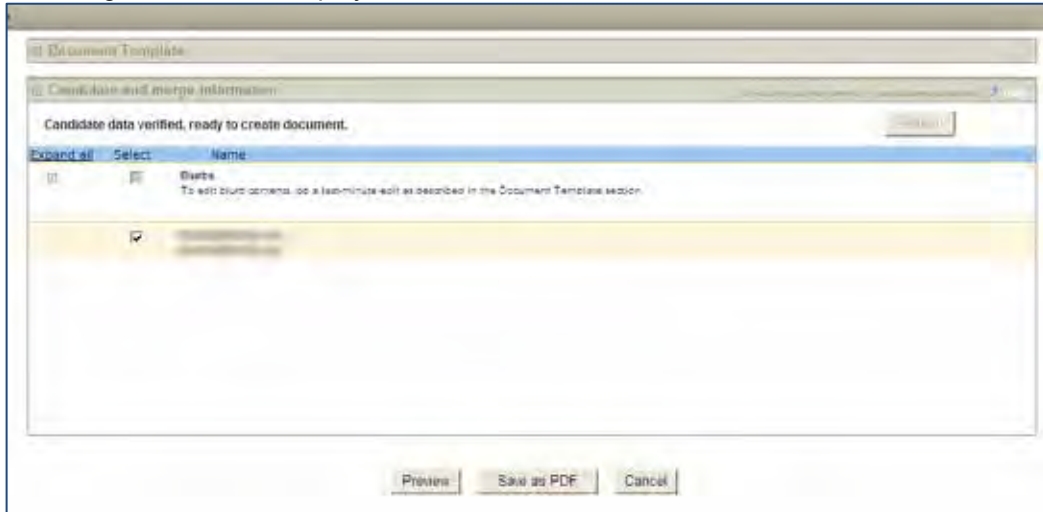
2xB User Experience

When a 2xB template administrator has created a document template, 2xB users can access and use the document template when creating documents for candidates. If a 2xB user has privileges to edit either a document template (last minute editing) or a blurb, they may do so in this workflow.


In 2xB:

1. Navigate to a req folder and select one or more candidates.
2. **Actions > Create Document.**

3. Select a .doc/.docx template and click **Go**.
The Merge Info Screen displays.



4. (Optional) Click the plus sign **+** to open the Document Template section.
If 2xB user has editing permissions, user can open, (click the document link), edit, and save the revised document template.

 **Note:** Merge token fields cannot be removed during last-minute edits. 2xB users must save edited document locally and re-upload to the document template. Editing and re-uploading the .doc/.docx file during document generation affects the final, generated document(s) for the selected candidate(s) but **DOES NOT** change the original document template.

Document Template

*Document name

*Upload .doc/.docx file

File	File Size
Acme20Technical20Enterprises[1].docx	15 K

To complete document generation:

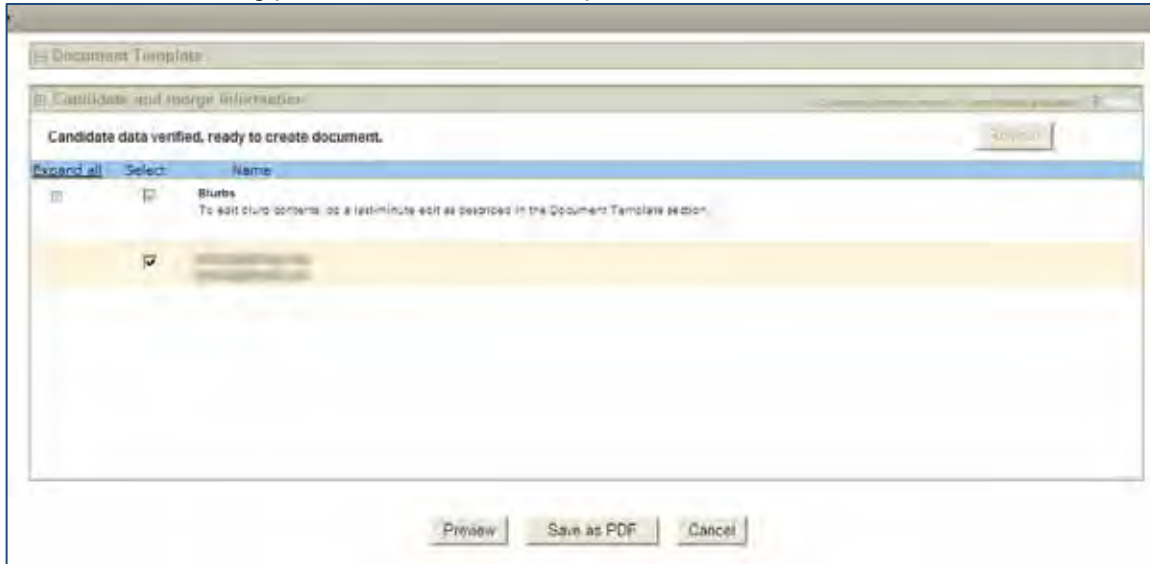
1. Do edits and selections in the **Candidate and merge information** area if necessary.
2. Click **Preview** to view document(s) as PDF(s). Merge fields are populated and conditional blurbs are evaluated for each candidate.
3. Inspect the document(s) in the Preview window:
 - If the document(s) are ready, click **Save as PDF** to save them to the Talent Record(s).
 - If the document(s) need editing, note the changes you want to make and do a last-minute edit.

To do a last-minute edit:

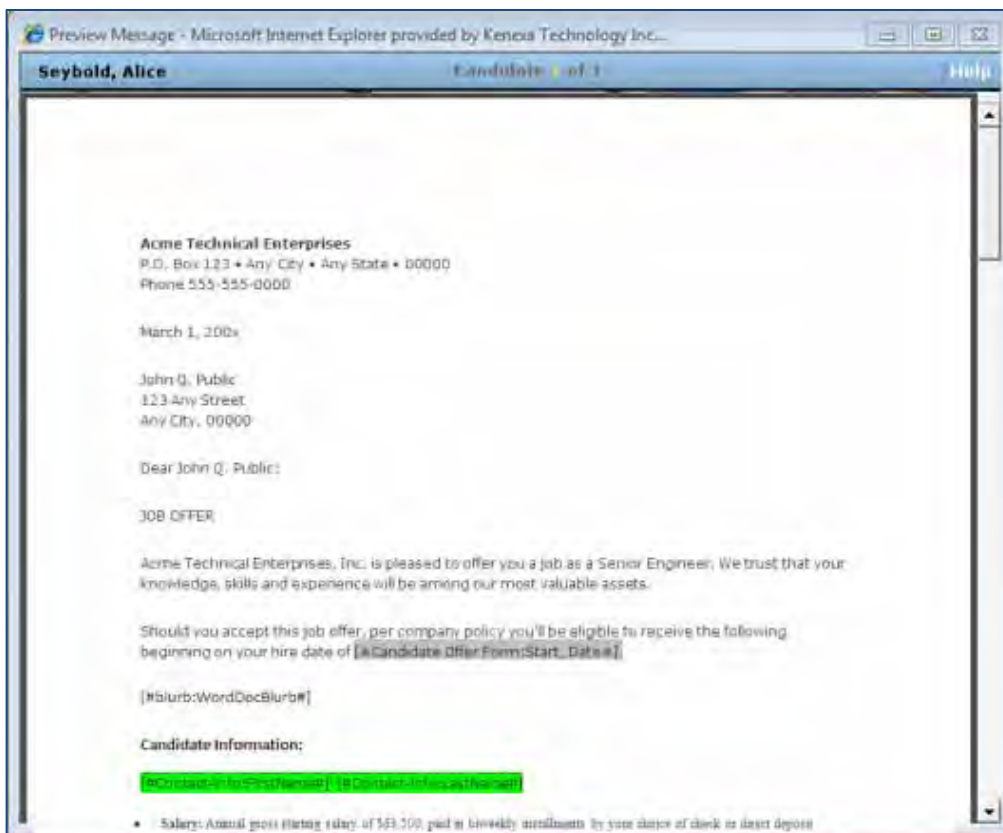
1. Click the document link above. The file opens in your usual word processing application.
2. Make your edits and save the file to your local environment. Updates to this file affect all selected candidates.
3. **Browse** to the updated file from the grid area above. **Upload** the file to this page.
4. Follow the document generation completion steps above.

Editing and re-uploading the .doc/.docx file during document generation affects the final, generated document(s) for the selected candidate(s) but does not change the original document template.

5. Click the minus sign **–** to close the Document Template section.
6. Click the plus sign **+** to open the Candidate and Merge information section. If there is any missing candidate information, a red flag appears to the left of the information field. If enabled, an edit hyperlink option allows you to update missing or update existing candidate information. If 2xB user has editing permissions, he/she can open, edit, and save the Blurb.



7. Click **Preview** to preview the PDF document. Blurbs and tokens do not resolve until document generation. For users who are authorized to edit content, make last-minute edits if necessary.



8. Click the **X** to close the Preview Message window.
9. Click **Save As PDF**. Document is saved to each candidate's Talent Record.

Last-Minute Edits

2xB users authorized to edit content for a particular template can do last-minute edits when using document templates to create documents. Last-minute editing includes editing a structural element, removing blurbs or parts of blurbs, changing candidate information, or editing the document footer. You can edit all document content except merge tokens.

To do last-minute edits:

1. Preview generated document and determine what changes need to be made.
2. Complete or edit information in the Candidate and Merge Information Section if necessary.
3. Click the .doc/.docx file to open the document template and make corrections and edits as necessary.
4. Save the file to your local environment and re-upload the updated file to the Create document page.
5. Click **Preview**. You will see the revised content in pdf preview.
6. Click **Save as PDF**.



Last-minute edits change the generated document for the intended candidates but does not change the original document template.

Limitations and Known Issues

Merge fields are required when using this feature. This feature does not encompass holding a batch for generation at a later time, bulk printing, or envelope printing.

In addition, templates and blurbs created through document upload are NOT interchangeable with HTML editor created templates and blurbs.

How Do Clients Get this Feature?

This feature is controlled by a new client setting and an optional user privilege that allows last minute editing of document templates. Please contact your Kenexa Support Team for more information about enabling this feature.

Workbench Self-Service Certified Users

You set the editing permissions for document templates in **Tools > Users > User Types > Edit type permissions > Communication > Document templates - administer**.

This user privilege allows a template administrator to edit an existing template.

2x BrassRing Admin

Document template administrators can now create .doc/.docx documents containing branding, headers, and footers and use those externally created documents as templates within the 2xB application. Once created and uploaded, 2xB users can access and use these document templates when sending candidate communications. Blurbs must be created specifically for .doc/.docx document templates.



Note: Document templates and blurbs created through document upload are NOT interchangeable with HTML editor created templates and blurbs.

Creating Enhanced Document Templates

The workflow for this feature is:

- Prepare documents externally (outside the 2xB application).
- Copy merge tokens and blurbs from the 2xB application
- Paste and position those merge tokens and blurbs into the external document
- Save and upload the externally created document into 2xB
- Set editing privileges and template settings for the uploaded document
- Save the document template.

2xB users can then use the document template in their workflow. Additionally, 2xB users can set editing and other permissions for 2xB users who access this template.

External to 2xB:

1. 2xB administrator creates and saves document to be used as template in word processing application incorporating branding, headers, and footers.

In 2xB:

2. **Admin > Communication > Add Document Template.**

The Select Editor dialog box displays.



3. Select the radio button for **“Word or other word processor.”**


- Click **Go**.
The .doc/.docx document template screen displays.

- Click the drop-down arrow on the combo box to select the merge field category and to populate the merge fields.
- (Required) Select the merge tokens from the combo box and click **Copy**.
A pop-up window indicates which merge tokens have been copied to the clipboard.



7. Click **OK**.
8. If adding blurbs to the template, select one or multiple blurbs from the Insert blurb multi-select list below the Merge Fields area in the right panel. (If adding user-selectable blurbs, select a blurb category first, and then select the blurbs belonging to the category.)
9. A pop-up window indicates the blurb was copied to the clipboard.

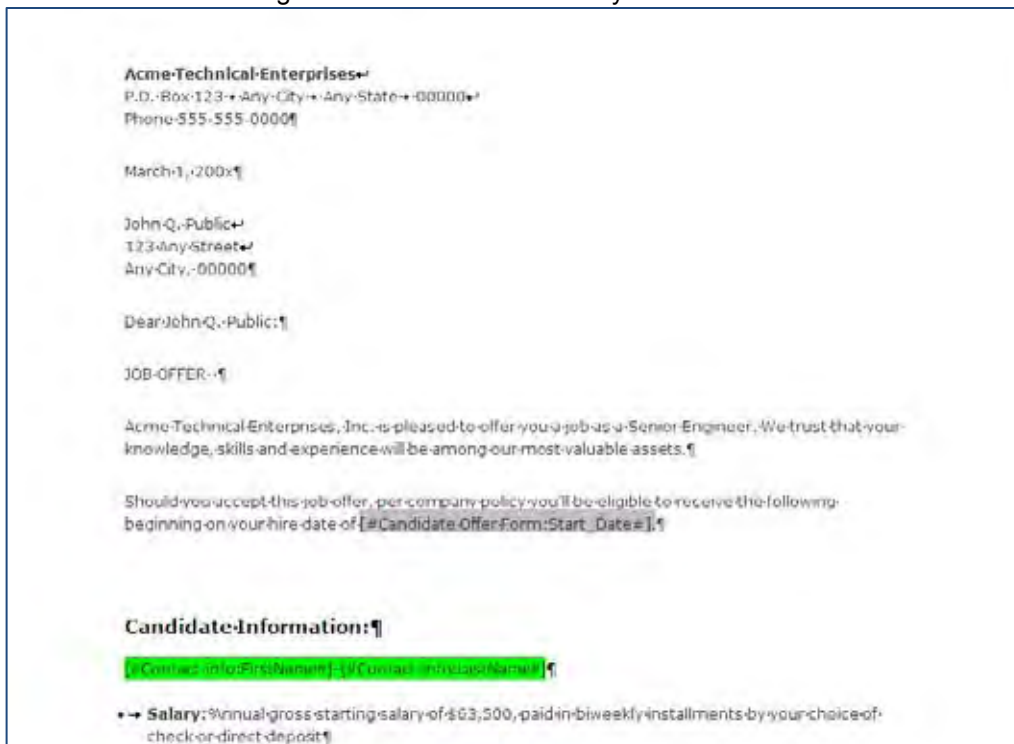


 Merge tokens and blurbs must be copied and pasted separately into external documents

10. Click **OK**.

External to 2xB:

11. Open the document file created for this template and position cursor where you want to paste tokens.
12. Use **Ctrl+V** or **Paste** to paste merge tokens and blurbs into externally created document.
13. Position and move merge tokens and blurbs where you want them.

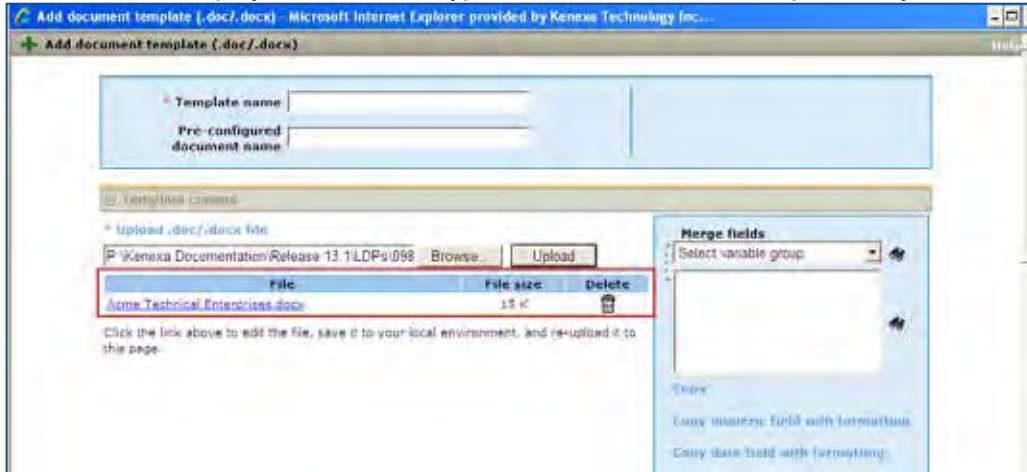


14. Save the document locally, for example, to your hard drive.

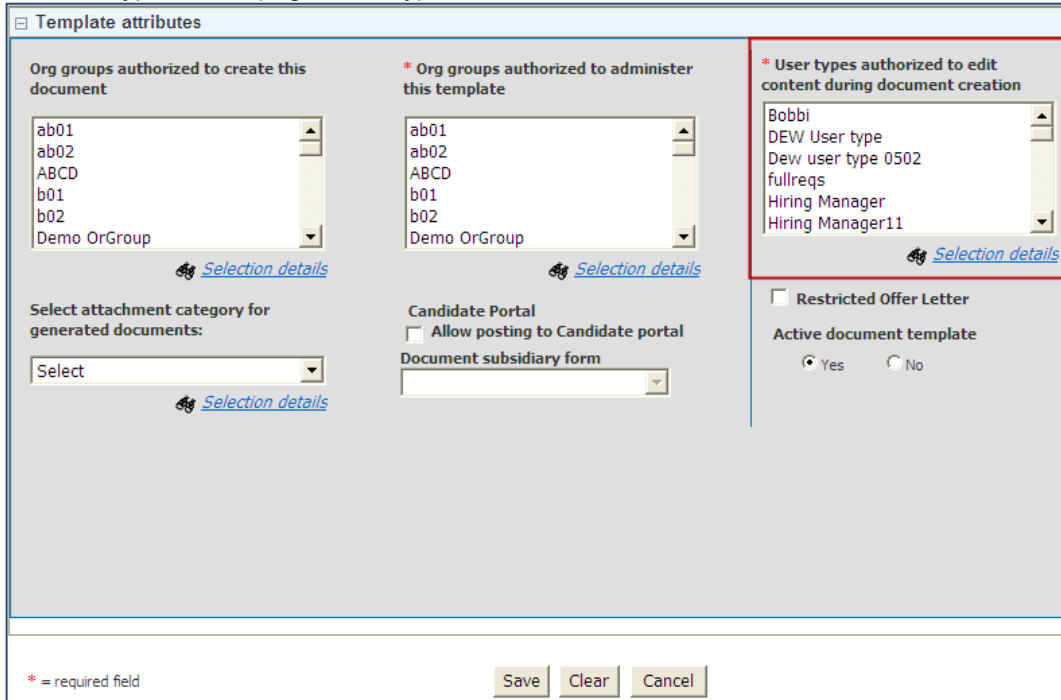
In 2xB:

15. Click on the Add Document Template and complete Template Name field (and the Pre-configured document name field, if desired) in the Add document template (.doc/.docx) screen.

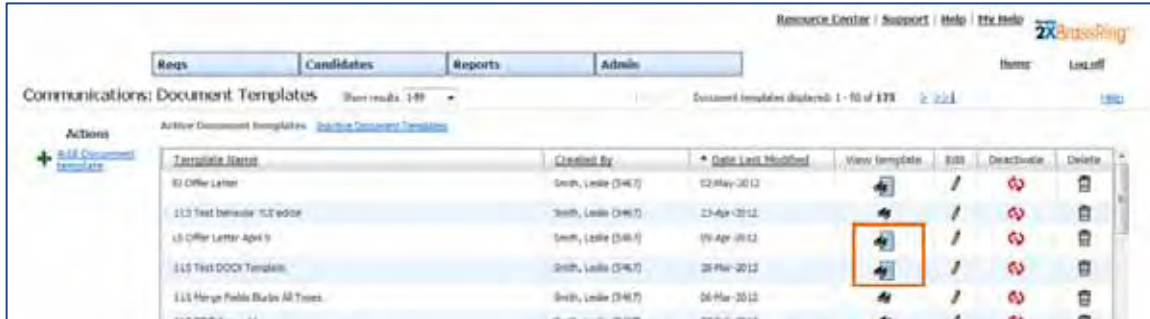
- Click **Upload** to upload the externally created document.
The document displays as an active hyperlink in the document template body.



- Complete the Org groups settings and the User Types authorized to edit content and complete all other template settings as required on the Add Document template (.doc/.docx) page. You must select at least one user type on this page. User types selected are authorized to make last-minute edits in pdf Preview.




- Click **Save**.
The document template is saved using the name entered in the Template Name field and displays on the Communications: Document templates page. A new View icon displays next to all .doc/.docx based templates.



Creating .doc/.docx Based Blurbs

If your company plans to use blurbs in your .doc/.docx-based document templates, your communications administrator must create .doc/.docx-based blurbs. Doc/.docx-based blurbs can be used in .doc/.docx-based document templates only, and in the 'Create document' workflow.

Each blurb is created as a separate .doc/.docx document and each .doc/.docx file is uploaded to its own Add blurb (.doc/.docx) page.




Note: You cannot use .doc/.docx-based blurbs in email templates. .

The workflow for this feature is:

- Prepare blurb content externally (outside the 2xB application) in Microsoft® Word or similar application.
- IN 2x BrassRing, navigate to the Add blurb (.doc/.docx) page.
- If necessary, copy merge tokens into the blurb from the 2xB application
- Paste and position those merge tokens into the external Word document that represents the content of the blurb.
- Save the Word document locally and upload it to the Add blurb (.doc/.docx) page.
- Complete the configuration of the remaining settings on the Add blurb (.doc/.docx) page.

External to 2xB:

1. 2xB administrator creates and saves Word document that represents the blurb in the word processing application.



Do Not include headers or footers in blurbs.

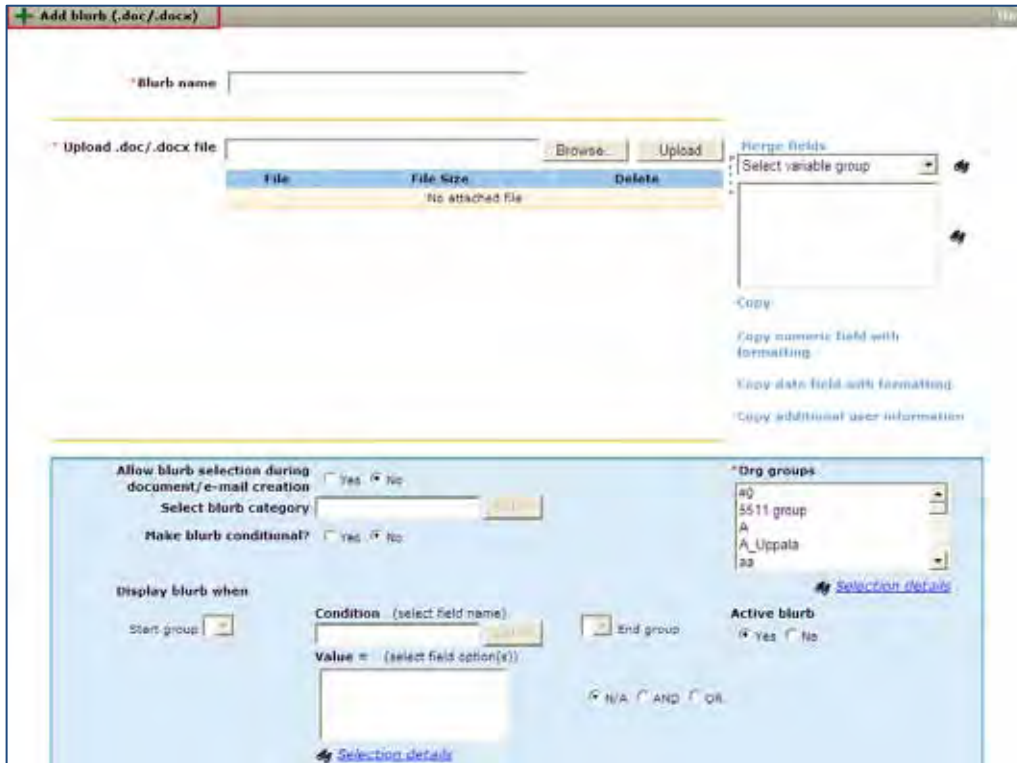
In 2xB:

1. **Admin > Communications > Add Blurb.**
The Add Blurb – Select Editor dialog box displays.



2. Select the radio button for **“Word or other word processor.”**

- Click **Go**.
The .doc/.docx blurb template screen displays.



- Click the drop-down arrow on the merge field combo box to select the merge field category and to populate the merge fields.
- Select the merge tokens from the combo box and click **Copy**.
A pop-up window indicates which merge tokens have been copied to the clipboard.



- Click **OK**.

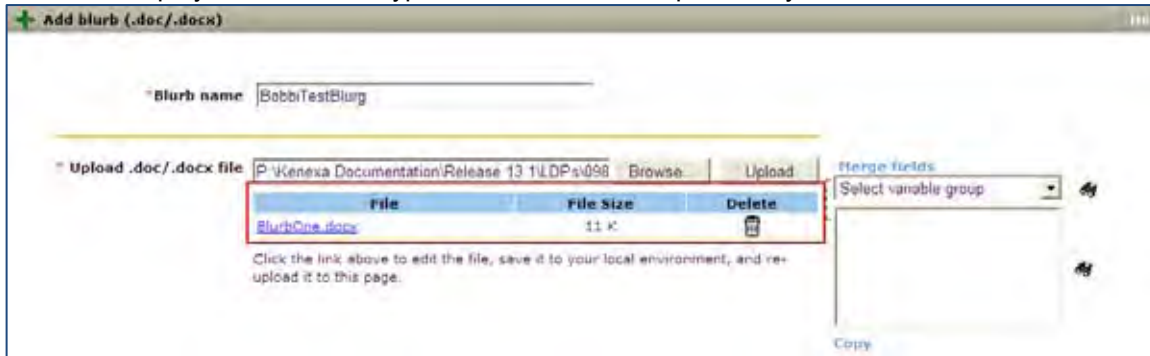
External to 2xB:

- Open the blurb document file and position cursor where you want to paste tokens.
- Use **Ctrl+V** or **Paste** to paste merge tokens into the blurb.
- Position and move merge tokens and blurbs where you want them.
- Save the blurb locally, for example, to your hard drive.

In 2xB:

- Click **Upload** to upload the externally created blurb.

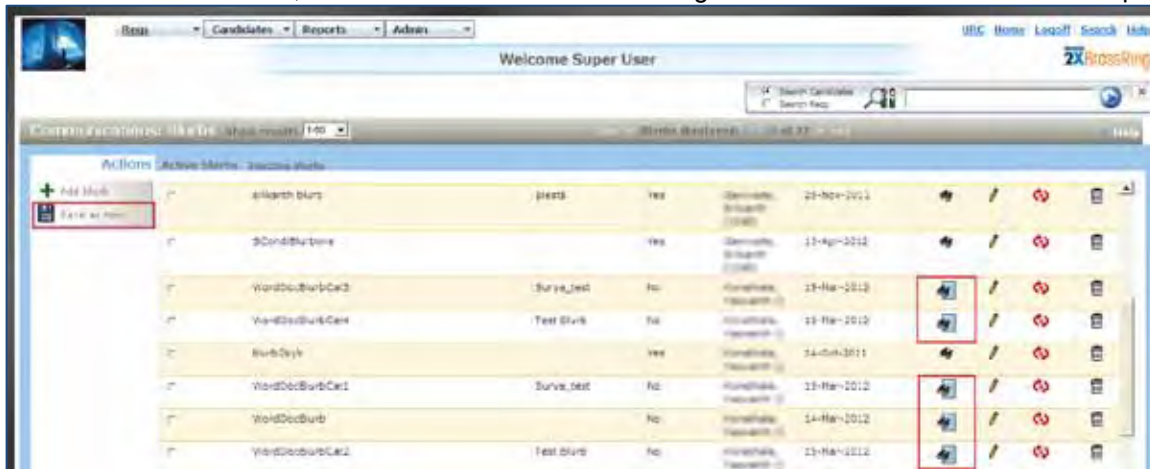
The blurb displays as an active hyperlink in the blurb template body.



Complete the fields and set conditions (optional) for the blurb.

12. Click **Save**.

The blurb is saved on the Communications: Blurbs page. A new View icon displays next to all Doc/Docx based blurbs. In addition, 2xB users can now select existing blurbs and use the Save as New option.



Kenexa Tasks

A new client setting enables this document enhancement feature. Other clients settings that may alter the appearance of how the new feature displays:

- Document/email generation – always allow edits
- Enable multiple conditions on blurbs
- Enable pre-filtered document templates

Clients can enable these additional client settings as necessary.

Workbench

To enable this new feature enable the Document Templates and Blurbs setting. Additional client settings that effect how this feature displays in 2xB are shown as well.

1. **WB > Manage Clients > Edit Client Settings.**

WB client setting displays:

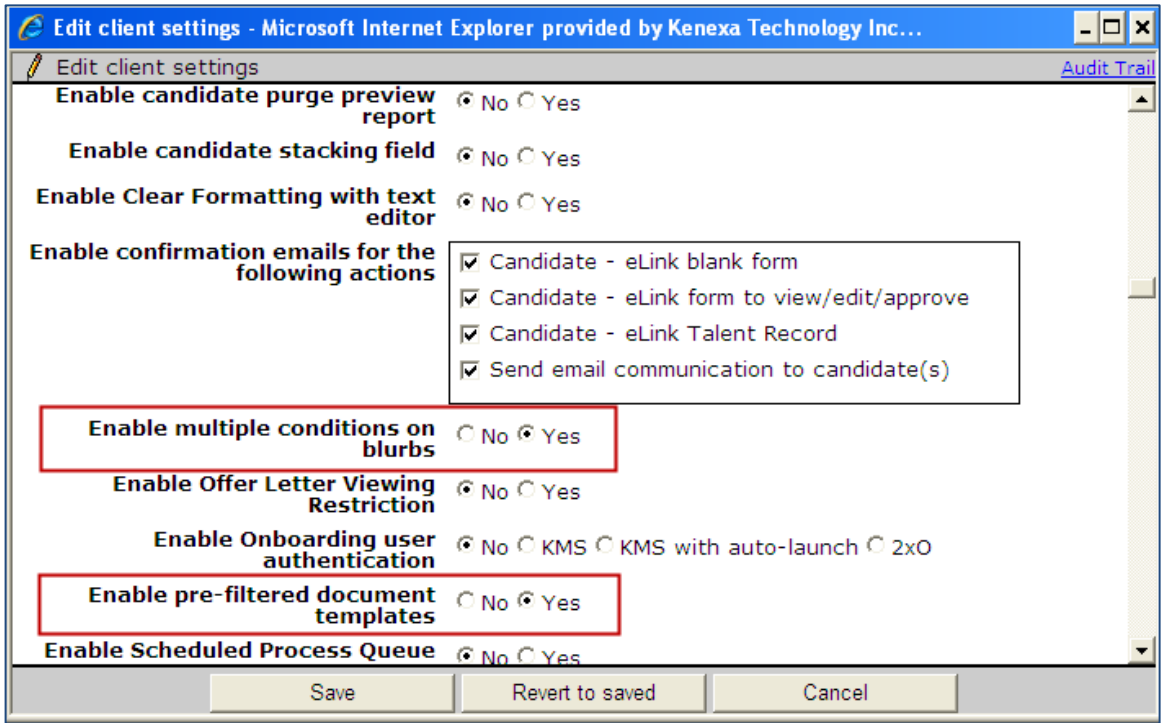
2. Select the **Yes** radio button for “Document Templates and Blurbs – enable .doc/.docx file usage” to enable this feature.
3. (Optional) Select the **Yes** radio button for “Document/email generation always allows edits”.

The screenshot shows a web browser window titled "Edit client settings - Microsoft Internet Explorer provided by Kenexa Technology Inc...". The page content includes several settings:

- Default action for Move/Copy Candidates to Req: Copy Move
- Default action for Move/Copy to Req – HR status retention: Do not retain any HR status data
- DEW form field names: Display name
- Display inactive options in edit mode for Reqs and Candidate forms: No Yes
- Display Skills and Resp. fields for apply using: Profile builder resume Any resume/CV type
- DisplayElinkLogo: None
- Document templates and blurbs – enable .doc/.docx file usage: No Yes
- Document/email generation – always allow edits: No Yes
- E-mail type configuration: No Yes
- Elink approval - Display hyperlink and text: No Yes
- eLink Authentication: Off On

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

4. (Optional) Select the **Yes** radio button for “Enable multiple conditions on blurbs.”
5. (Optional) Select the **Yes** radio button for “Enable pre-filtered document templates.”



6. Click **Save**.

Data Insight Tool – BRUID History Output Field


Data Insight Tool now includes a new output field, BRUID – History, that reports on a candidate’s current and historical data.

Product Release 13.1 RDP591	↳ 2x BrassRing	↳ Data Insight Tool
Visible Changes	↳ Yes – details in <i>Visible Changes</i> document sent for each release build.	
How do I get this feature?	↳ Automatic – see details below.	

Feature Description

This new Data Insight output field, BRUID – History, in System Information under the Candidate category, captures current and historical BRUID candidate data. Report users can select one of two output criteria for display: comma-delimited rows or multiple rows.

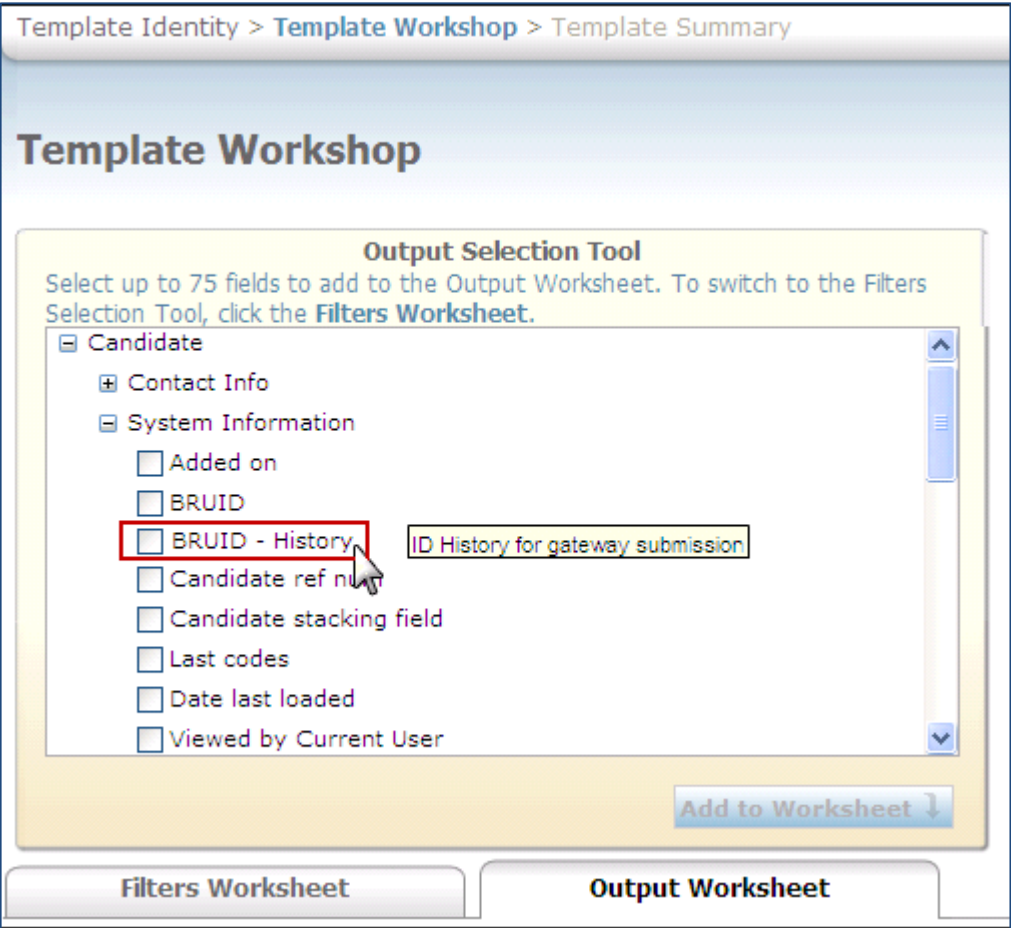
This functionality is available for all Data Insight users.

 Filter worksheet functionality is NOT affected by the BRUID – History output field.

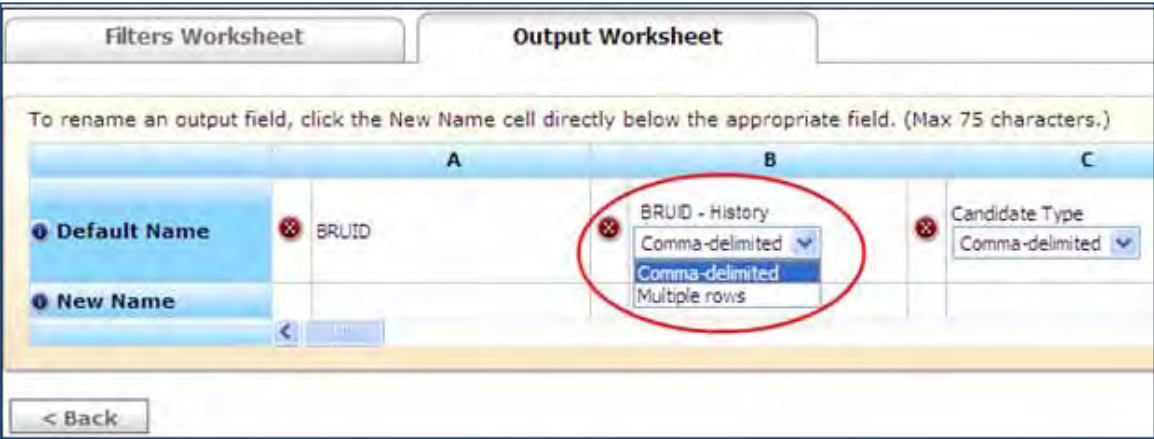
2x BrassRing Users

In 2xB the users logs on and has all the requisite user privileges.

1. 2xB users selects **Reports > Data insight tool > Manage templates > Create New Template > (OR Edit Template) Output Worksheet**.
Template Identify page displays.
2. User selects or enters criteria.
Data Insight tree displays.
3. User selects Candidate category and System Information in the Output Worksheet.
The template Output Selection Tool displays:



- User selects the checkbox for **BRUID – History**.
- User then selects the display option for the BRUID – History output field.



How Do Clients Get this Feature?

This feature is available automatically without configuration.

Data Insight Tool - Excluding HTML Tags Reports

This feature provides an option for 2xB users to exclude HTML tags from text fields in Data Insight templates. The checkbox to exclude HTML tags is unchecked by default.

Release 13.1 RDP 617	↳ 2x BrassRing	↳ Data Insight Tool
Visible Changes	↳ Yes – details in <i>Visible Changes</i> document sent for each release build.	
How do I get this feature?	↳ Automatic – see details below.	

Feature Description

This feature allows 2xB users to select a checkbox option, Exclude HTML tags from all texts fields within this template, on the Data Insight Template Identity page. When Data Insight reports generate, the HTML tags do not appear in any of the template text fields.



The exclude HTML tags checkbox is unchecked by default.

2x BrassRing Users

Use this procedure to exclude HTML tags from template text fields.

1. Select **Reports > Data Insight Tool > Manage Templates**.
The Data Insight Tool: Managing Templates page displays.
2. Click **Create New Template** (or **Data Insight Template**).
The Template Identity Page displays.

3. Complete Template fields.
4. Select the checkbox for **Exclude HTML tags from text fields in this template** in the Template Output field.
5. User clicks **Next** and completes the DATA INSIGHT template.

When the Data Insight Reports generates, HTML tags do not display in any report text fields.

How Do Clients Get this Feature?

This feature is available automatically without configuration.

Data Insight Tool – Social Media Jobs Display Data

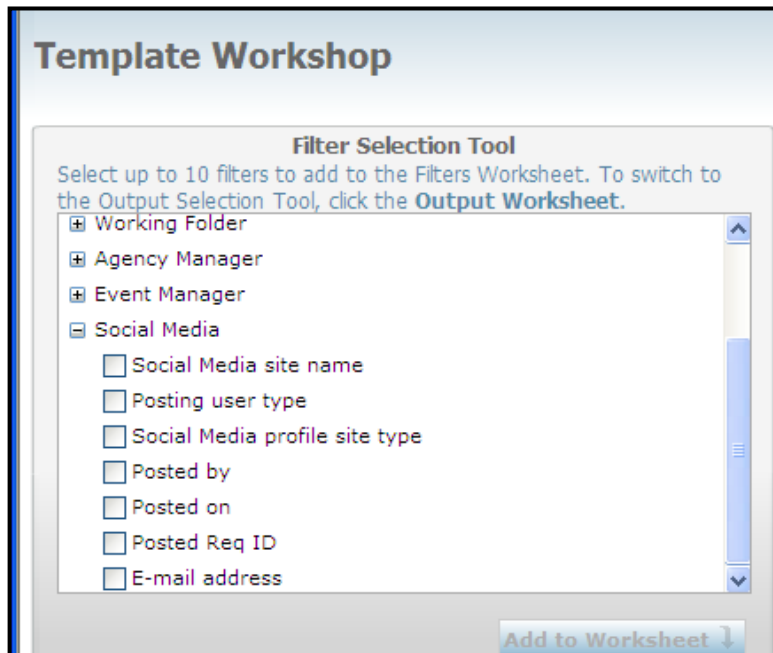
As of Release 13.0 Build 1, you can report on data for the jobs posted on the company Facebook page, retrieving information such as the number of applicants applying via the Facebook app.

Product RDP587 Release 13.1	↳ 2x BrassRing	↳ Data Insight Tool
Visible Changes	↳ Yes – details in <i>Visible Changes</i> document sent for each release build.	
How do I get this feature?	↳ Automatic if client setting already enabled – see details below.	

Feature Description

A feature introduced in Release 13.0 supports a Facebook app/widget that allows you to display jobs from 2xB on your company’s Facebook page. As of Release 13.0 Build 1, you can also report on that company Facebook data, retrieving information such as the number of applicants applying via the Facebook app.

The fields were introduced for Data Insight for another project in Release 13.0: LDP087, Data Insight Tool – Candidate Social Media Source Information. The fields are located in the **Social Media** category, and 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**). Social media integration must be enabled for this Data Insight tree view to be visible.



Fields that can be reported on in the **Social Media** category include:

- **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.

The following social media fields are not populated because they are reported/associated with the req being posted out to the Social Media site:

- **Posted by**
- **Posted on**

- **Posted req id**
- **Email address**

Report Samples

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

Applied to Req via Company's Facebook App and/or Manually Filed to Req

- The actual Req to which candidate is filed is shown in ReqID field and its associated HR status is shown in "Current HR Status".
- Only values from Social Media fields that will be shown are Site Name and Type (other Social Media fields will be blank).

Req ID	ResumeKey	Candidate Name (FirstName Lastname)	Current HR Status	Social media source					
				Site Name	Type	Posted By	Posted On	Posted Req ID	Email
102BR	18903	Stephen Chase	2nd Interview	Facebook	App				
105BR	15882	Erik Jong	Final	Facebook	App				

Jobless Apply

For Jobless applies the data is shown for the candidate with no req data.

Req ID	ResumeKey	Candidate Name (FirstName Lastname)	Current HR Status	Social media source					
				Site Name	Type	Posted By	Posted On	Posted Req ID	Email
	18903	Stephen Chase	2nd Interview	Facebook	App				
	15882	Erik Jong	Final	Facebook	App				

Candidate Applies to Multiple Reqs

If the same candidate is filed to multiple reqs, the "Site Name" and "Type" are repeated (because the data joins are based on candidate fields only within the Social Media category).

Req ID	ResumeKey	Candidate Name (FirstName Lastname)	Current HR Status	Social media source					
				Site Name	Type	Posted By	Posted On	Posted Req ID	Email
099BR	18950	Stephen Chase	Phone Screen	Facebook	App				
100BR	12376	Stephen Chase	1 st Interview	Facebook	App				
101BR	18903	Stephen Chase	2 nd Interview	Facebook	App				
102BR	18545	Erik Jong	Interview	Facebook	App				
105BR	15882	Erik Jong	Final	Facebook	App				

No Req Fields Selected in Data Insight

With only Candidates and Social Media fields selected, thereport returns available Social Media data for all the candidates, irrespective of whether candidate is filed to a req or not.

Req ID	ResumeKey	Candidate Name (FirstName Lastname)	Social media source					
			Site Name	Site Name	Site Name	Site Name	Site Name	Site Name
102BR	18903	Stephen Simon	Facebook	App				

105BR	15882	Erik John	Facebook	App				
	17863	John Smith	Facebook	App				
	15841	Tracy Johnson	Facebook	App				

How Do Clients Get this Feature?

This feature is controlled by an existing client setting, Social Media Integration. Please contact your Kenexa Support Team for more information about enabling this feature.

Kenexa Tasks

Social Media reporting in Data Insight requires the following client settings be enabled (**Admin > Manage Clients > Edit Client Settings**):

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

Microsoft Internet Explorer provided by Kenexa Technology, Inc.

Edit client settings [Audit Trail](#)

Enable multiple conditions on blurbs No Yes

Enable Offer Letter Viewing Restriction No Yes

Enable Onboarding user authentication No KMS KMS with auto-launch 2x0

Enable pre-filtered document templates No Yes

Enable Scheduled Process Queue No Yes

Enable Social Media Integration

Facebook

LinkedIn

Twitter

Enable social media integration with Talent Record No Yes

Enable Social Media Integration-maximum allowed company accounts(1-25)

Enable Social Media Integration-maximum allowed personal

Save Revert to saved Cancel

Forms – Selective Re-Approval

A new form approval setting for 2xB sequential and parallel approval methods now allows your organization to have more control over the types of changes that require a candidate form or req subsidiary form to be re-approved. In addition, approvers' comments are now displayed more accessibly for these forms, with the other approval details.

Product LDP094 Release 13.1	↳ 2x BrassRing	↳ Workbench Self-Service
Visible Changes	↳ Yes – details in <i>Visible Changes</i> document sent for each release build.	
How do I get this feature?	↳ Specific conditions required – see details below.	

Feature Description

Previously, if a candidate form was edited in 2xB *after* it had been sent for approvals or had been approved, a user who clicked the **Save** button was prompted that all approval statuses would be cleared and the form would need to be resent for approval. This effectively made users start the approval process all over.. This is generally appropriate when editing a field like Annual Salary. However, approvals were reset even when the change wouldn't necessarily require re-approval, such as editing the Start Date value.

A new form approval setting now allows your organization to have more control over the types of changes that require a candidate form or req subsidiary form to be re-approved. Forms can be set to:

- never require re-approval
- require re-approval when there's a change to any field
- require re-approval when there's a change to specific fields that your organization selects for the form.

The new setting affects **Save** button functionality only. The **Save and send for approval** button continues to always restart approvals.

Parallel Approval Buttons

A related change was made to the parallel approval process. Users editing Pending, Approved, or Declined forms routed via 2xB's parallel approval method now have the same buttons as for forms routed via 2xB's sequential approval method: **Save**, **Clear**, **Close**, **Save and send for approval**. (Previously only the **Send** or **Cancel** buttons were available. This forced users always to route the form for re-approvals upon field value changes.)

The same new form approval setting applies to both sequential and parallel approvals, providing options for when to require re-approvals if a form is edited.

Approver Comments

Candidate forms and req subsidiary forms with 2xB sequential or parallel approval methods also now display approvers' comment text with other approval details (approval level, approver name, approve/decline date, approval status, etc.). This put them right in the column on the approval table, where the information is most useful. Previously, comments entered by approvers were only displayed as a tool tip in eLink "Response" column and on the New UI Talent Record "Details" column for form approval actions.

For legacy data, comments previously entered during approvals will automatically be displayed.

2xB User Experience

Selective Re-approval

When you add or edit a candidate form or a req subsidiary form, you have four actions available for either sequential or parallel approvals.

Save

- When adding the form, or when editing a form where the Re-approval routing setting is “**Never**,” saves the form values and closes the form.
- When editing, if the Re-approval routing setting is “**Change to specific field(s)**” but none of the specific fields is changed, saves the form values and closes the form.
- When editing, if the Re-approval routing setting is “**Change to any field**” or is “**Change to specific field(s)**” with a change made to a selected field’s value, AND the form has started the approval process (has non-blank approval status of Pending, Approved, Declined), the system prompts:
 “Warning: Original approval(s) status(es) will be reset. The form must be sent for new approval(s). Do you wish to continue?”
 A response of **OK** clears the approval statuses, saves the changes, and closes the form.
 A response of **Cancel** does not clear the approval statuses, does not save the changes, does not close the form, but does close the warning prompt.

Clear

- Clears visible field values, form remains open.

Close

- Closes the form window without saving any changes.

Save and send for approval

- Saves the form, and prompts:
 “Warning: Original approval(s) status(es) will be reset. The form must be sent for new approval(s). Do you wish to continue?”
 A response of **OK** clears the approval statuses (approval status, date sent, approve/decline date) but not approver names and email addresses, and sends the form to *all* of the selected form approvers (for parallel process) or to *first* approval level (for sequential process).
 A response of **Cancel** does not clear the approval statuses, does not save the changes, does not close the form, but does close the warning prompt.

Comments (Parallel Approval)

For candidate forms where the **Approval process = parallel**, the comments column appears only when the rest of the Approval details appear. This is in **View mode** when the form is in **Pending, Approved, or Declined** status.

Status date updated	Status updated by	Status	Action	Comments
14-Feb-2012	Jenet Kibuki	Pending	Approve/Decline	Approve this candidate to continue to next interview phase
14-Feb-2012	Laura LaRosa	Approved		
14-Feb-2012	Cynthia Civil	Approved		
14-Feb-2012	Jagadeesh P	Pending	Approve/Decline	
Date added	14-Feb-2012	Kibuki, Jenet (510-4615)		
Last action	14-Feb-2012	Kibuki, Jenet (510-4615)		

[Close](#)

Comments (Sequential Approval)

For candidate forms where the **Approval process = sequential**, the comments appear when the Approval details appear:

- for “View form” or “eLink form to view” when the form has no approval status prior to approval, or **Pending, Approved, or Declined** status

Approval level	User	Date Sent	Status	Action	Approve/Decline Date	Comments
Dept Mgr	Kibuki, Jenet					
Division Mgr	Hitterman, Veronica					
Su Mgr	Sheppard, Trina					
Notify upon form approval completion						
Users selected in req/Form						
Specific system user(s)						
Date added	15-Feb-2012	Kibuki, Jenet (510-4615)				

[Close](#)

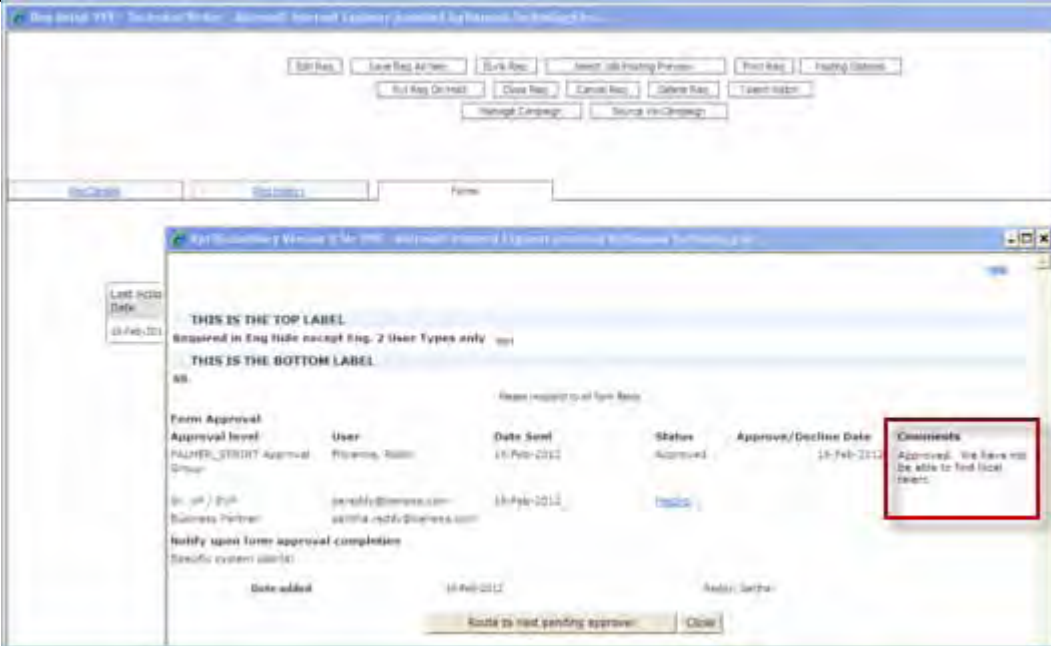
- for “Edit form” when the form is in **Pending, Approved, or Declined** status (comments aren’t labeled, and appear, for previous approvers who have made them, below the approval level and details line.

- for **eLink form to approve** when the form is being routed for approval, comments appear for previous approvers that have made them *if* the form setting **Cascade approval messages** is checked. Then the **Comments** column appears to the right of the existing “Approve/Decline Date” column.

Comments for Requisition Subsidiary Forms

Similar Comments column changes also apply for Req subsidiary forms in 2xB **View mode**, **eLink to approve**, and **eLink to view**, where the **Approval process = sequential**.

- For **View mode** when the form is not yet sent for approval or in **Pending, Approved, or Declined** status, the Comments column will appear to the right of the existing column Approval/Decline Date.



- For eLink to approve when the form is being sent for approval, the Comments column will appear to the right of the existing column Approval/Decline Date. If a previous approver has entered a comment during approval, the comments will be shown to the next approver.
- For eLink to view when the Req sub form is eLinked in a **Pending, Approved, or Declined** status, the Comments column will appear to the right of the existing column Approval/Decline Date.

Limitationss

SmartApproval – If a form has Approval process = Rules-based (SmartApproval), the **Edit form approvals** setting for selective re-approval routing isn't available. When 2xB users edit a form with SmartApproval approval process and click the **Save** button, the form is saved without providing the user with a warning prompt that all approval levels will be reset.

How Do Clients Get this Feature?

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

Workbench Self-Service Certified Users

The **Re-approval routing** setting lets you choose the fields that will reset current approval statuses and prompt to send for new approvals when the user clicks **Save** after editing a form. It appears on the Edit form approvals page for:

- Candidate forms: **Tools > Forms > Candidate forms > Edit form approvals** [for selected form]
- Req subsidiary forms: **Tools > Forms > Reqs > Req subsidiary forms > Edit form approvals** [for selected form]

Approver	Routing order
Dept Mgr	1
BU Mgr	3

Configure Comments

Configure Re-approvals

Choose an option for the form approval setting:

- **Never**
A change to *any* field will *not* reset approvals
- **Change to any field (default)**
Any field change resets approvals. This default setting duplicates the previous behavior.
- **Change to specific field(s)**
Only a change to any of the selected fields will prompt for re-approval. Click **Select** to select the choose the fields that can trigger re-approval. You can select any active fields on the form *except*:
 - Label
 - Text area
 - Autofill with a source of Text area

Comments

The **Comments** field label is also configured on the **Edit form approvals** page, in the **Approve/Decline text area field label** setting.

Set the field as required or not in the **Approve/Decline text area field input value is** setting.

Gateway Questionnaires – JSQ Widget Alignment

This feature allows clients to configure format and alignment options for Job Specific Questions (JSQ) widgets on Gateway Questionnaires (GQs).

Product	▫ 2x BrassRing	▫ Talent Gateways
Release 13.1 RDP 546	▫ 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.	

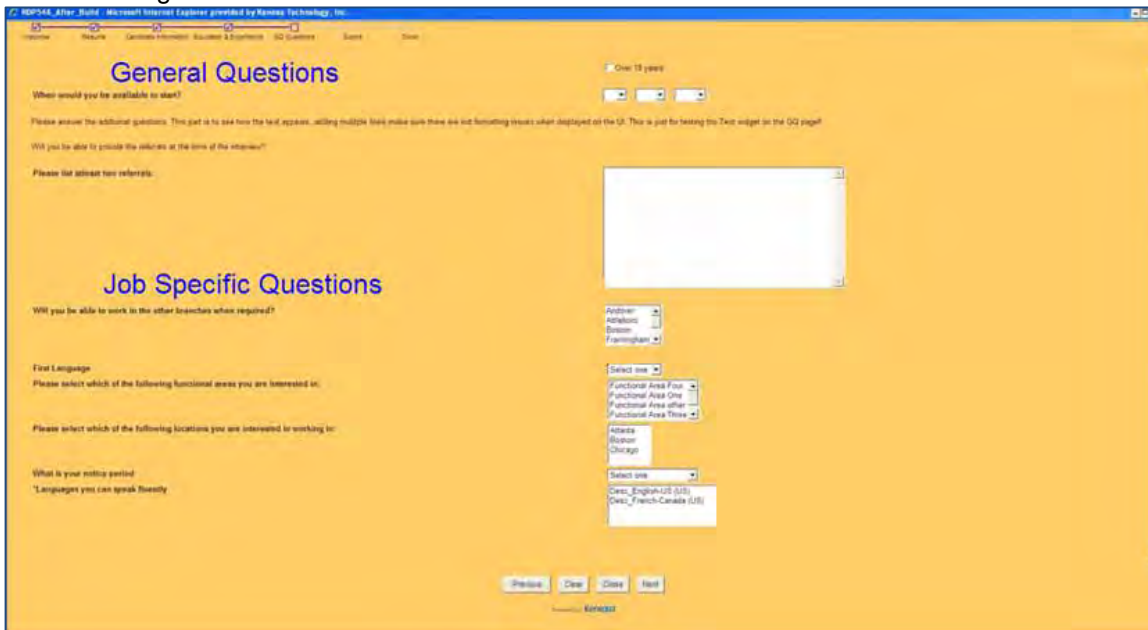
Feature Description

This feature allows the configuration of format and alignment options for JSQ widgets on GQs to ensure that General Questions and Job Specific Questions display aligned properly.

The two new JSQ formatting options, Display Option and Alignment, are both available for branching and non-branching questions and display on the View Widgets properties page.

Candidate Experience

When a candidate accesses a GQ, General and Job Specific Questions now display as configured with consistent alignment.



How Do Clients Get this Feature?

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

Workbench Self-Service Certified Users

To configure the JSQ widget on the Gateway Questionnaire, use the following procedure.

1. **Tools > Gateway Questionnaire.**
Create new questionnaire or edit an existing one.
2. Select a GQ and click the **Administer sections/pages** icon.

3. Click the **Administer widgets** icon for the page to which you want to add widgets. The Administer widgets screen displays.
4. Click **Add/Edit Widget**.
5. Click **Complex Widgets**.
6. Click **Job specific questions**.

The widget properties dialog box displays:

7. Complete desired widget field selections, including Display options and Alignment for JSQ widget, matching the display and alignment settings for the general widget questions.
8. Click **Save**.

Gateway Questionnaires – Pre-Filled Response Enhancement

This feature allows clients to enable auto pre-fill for duplicate questions in different Gateway Questionnaires (GQs) associated with Talent Gateways (TGs). When enabled, if a candidate applies and accesses a GQ containing questions they have answered previously, those questions automatically pre-fill with their responses.

Product RDP627 Release 13.1	<input type="checkbox"/> 2x BrassRing	<input type="checkbox"/> Talent Gateways
Visible Changes	<input type="checkbox"/> No – requires specific conditions / configuration for visibility.	
How do I get this feature?	<input type="checkbox"/> Configuration required – contact your CSC for implementation details.	

Feature Description

This feature gives the candidate a more seamless experience by having their previously answered questions pre-fill with their responses. Clients can choose to use this automatic pre-fill option when a candidate applies on a specific TG or if the candidate applies on any TG.

Candidate Experience

Enabled on Specific TG

When this setting is enabled, if GQs attached to two reqs on a specific TG contain some of the same questions, GQ responses will pre-fill for the duplicate questions when candidates apply to the second req and have previously answered the same question.

For example, the question, “Do you know Microsoft Word?” appears in two GQs attached to two different reqs on TG 1

1. A candidate applies to the first requisition on a specific TG (TG 1) and completes all the GQ responses fields.
2. Later, the candidate returns and applies to the second requisition on TG 1. The GQ response fields for the Question “Do you know Microsoft Word?” automatically pre-fill because the candidate answered the question before and is applying on this *specific* TG, TG 1.
3. Candidate then applies to another requisition on TG 2. The GQ response fields do NOT automatically populate because this feature is enabled only for this particular TG, TG 1.

Enabled on Any TG

When this setting is enabled, if GQs attached to multiple requisitions on *any* TGs contain some of the same questions, GQ responses will pre-fill for the duplicate questions when candidates apply to the second req and have previously answered the same question. The automatic pre-fill of the GQ occurs when a candidate applies to both of these requisitions, because the setting is for any TG.

For example, the question, “Do you know Microsoft Word?” appears in multiple GQs and this GQ is attached to two different reqs on two different TGs, TG 1 and TG 2.

1. A candidate applies to the first requisition on TG 1 and completes all the GQ response fields.
2. Later, the candidate applies to the second requisition on TG 2. The GQ response field for the Question, “Do You Know Microsoft Word?” automatically pre-fill because the candidate answered the question before and is applying to *any* TG.

How Do Clients Get this Feature?

This feature is controlled by a new client setting. In addition, the TG setting “disable GQ pre-filled responses” must be unchecked. Please contact your Kenexa Support Team for more information about enabling this feature.

Kenexa Tasks

Workbench

This feature requires a new client setting and a TG setting. The client setting determines if GQs are pre-filled on all TGs or for a specified TG.

This feature also requires the TG setting “Disable GQ pre-filled responses” setting to be disabled.

Client Setting:

Admin > Manage Clients > Edit Client Settings.

The screenshot shows a web browser window titled "Edit client settings - Microsoft Internet Explorer provided by Kenexa Technology Inc...". The page content is titled "Edit client settings" and includes an "Audit Trail" link. The settings are as follows:

- Lockout Period 2xB: 10 min
- Lockout Period Agency: 10 min
- Lockout Period Gateway: 10 min
- LockoutPeriod: N/A
- Log HR status change: No Yes
- Log req status change: No Yes
- Logic for Pre-filling Gateway Questionnaire responses:**
 - Pre-fill if candidate applied on specific Talent Gateway
 - Pre-fill if candidate applied on any Talent Gateway
- MaxFolderSize: 500000
- Maximum Attachment Storage (MB): 100
- Mobile device approvals: Off On
- Mobile Device Display Elink Logo: None ELink 2xB Both
- MS Office 2007 attachment support: No Yes
- Multi req update: No Yes
- Multi-language search--job posting questions: No Yes
- New UI: No Yes

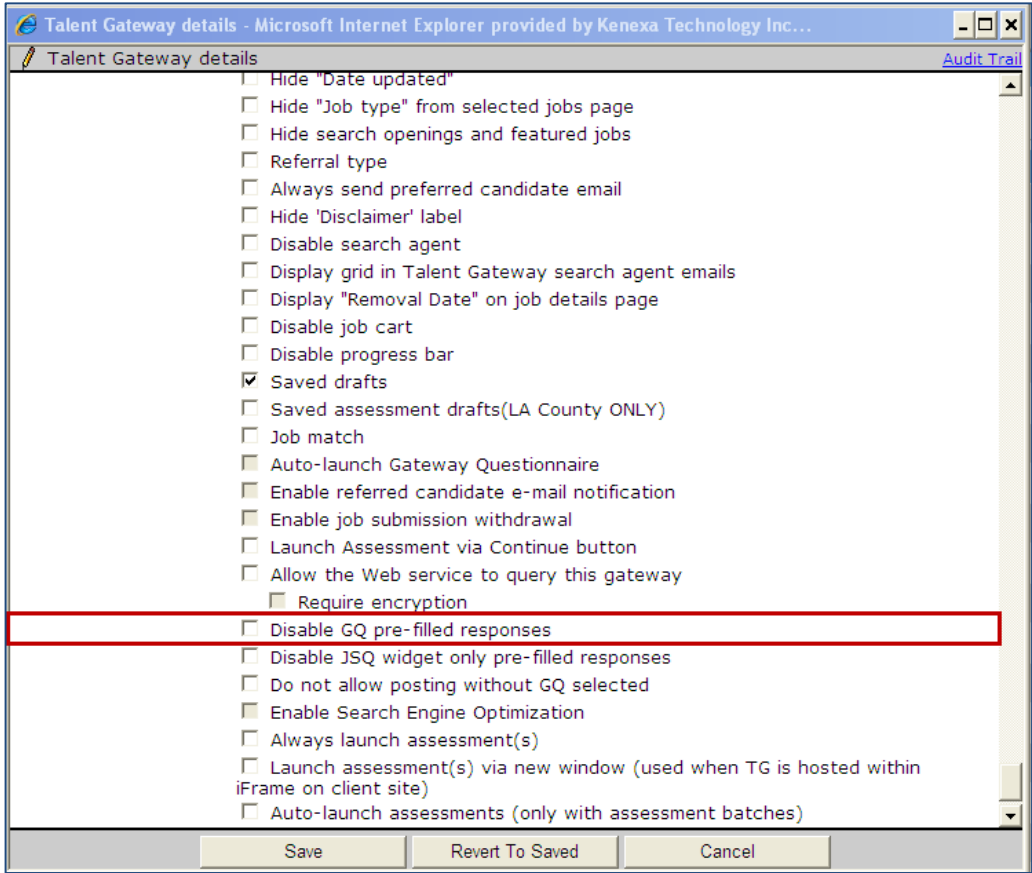
Buttons at the bottom: Save, Revert to saved, Cancel.

In the Logic for Pre-filling Gateway Questionnaire responses, select one of the following options:

- Pre-fill if candidate applied on a specific Talent Gateway, OR
- Pre-fill if candidate applied on any Talent Gateway

Talent Gateway Attribute

Tools > Talent Gateways > Admin > Edit [selected TG]



Uncheck the “Disable GQ pre-filled responses” checkbox.

Gateway Questionnaires – Preview Prior to Submission

This feature allows candidates applying via Gateway Questionnaires to preview their entire application prior to submission. This feature will be available as of Release 13.1 Build 2 (end of June 2012).

Product	<input type="checkbox"/> 2x BrassRing	<input type="checkbox"/> Talent Gateways
LDP104 Release 13.1	<input type="checkbox"/> Workbench Self-Service	<input type="checkbox"/> Agency Manager
Visible Changes	<input type="checkbox"/> No – requires specific conditions / configuration for visibility.	
How do I get this feature?	<input type="checkbox"/> Specific conditions required – see details below.	

Feature Description

When candidates apply via Gateway Questionnaires (GQs), the application process may include many steps through which different types of information are collected. This feature allows candidates to preview the answers provided for the GQ prior to submission. A new complex widget is available that allows the GQ designer to add the “Preview” link through which the candidates can preview their applications prior to submission.

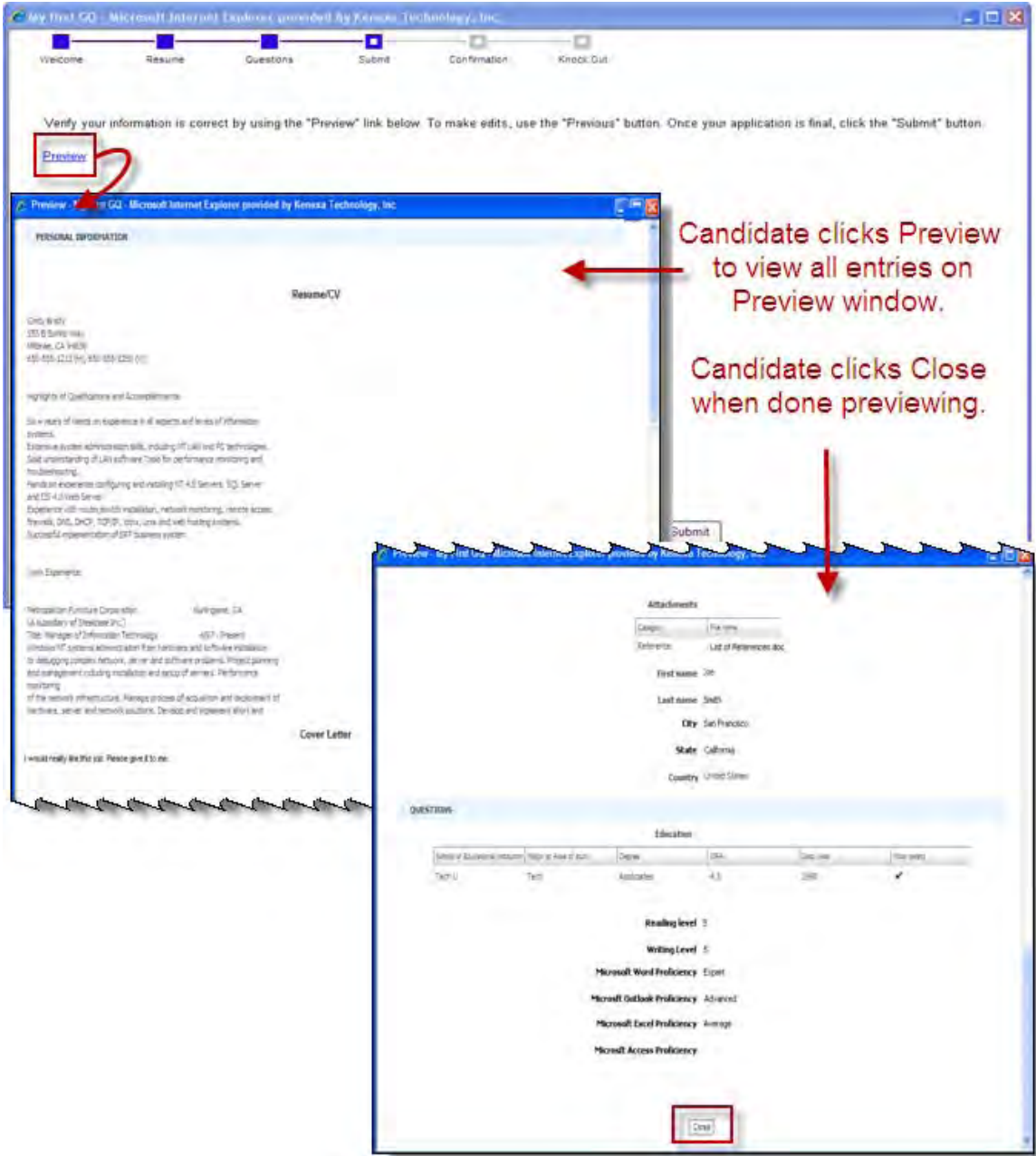
When previewing, the order of the display sections and questions reflects the order they are configured in the GQ (i.e., the order they appear on the “Administer Sections/Pages” page in Workbench). This means that they will appear in the order that the candidate completed them in most cases. However, in cases such as skip logic or multiple paths, the questions/sections may display on the preview in a different order than they were presented originally to the candidate in the GQ completion process.

For the display:

- All field types display as plain text in the preview with the selection or entry that the candidate made (or blank if not answered).
- If there is a multi-column configuration, the questions display in one column. The order of the questions is taken from the columns horizontally (i.e., Col 1 Row A comes first, Column 2 Row B comes next, Col 2 Row A comes next, etc.). (Multi-columns appear as-is for Job Response forms.)
- The “Date Added” is not displayed on the “Preview” page, (it gets displayed at the bottom of the Job Response Form).
- Asterisks are not displayed in the “Preview” for the mandatory questions.

Candidate Experience

When the new “Preview application” widget is placed in the GQ, the “Submit” page displays a link that will launch the new Preview window. Candidates access the link after going through the GQ to the submit page (when applying on a Talent Gateway to a job with the widget-enabled GQ attached).



- To open the preview, candidates click the Preview link. Questions that were left blank by the candidate will appear in the preview, but with no response.
- To close the pop-up preview window, candidates click **Close**. They can then navigate back using the **Previous** buttons to change items as needed.

Limitations and Known Issues

WOTC (Tax Credit check) widget not included in the Preview since the questions and answers are part of a third party integration.

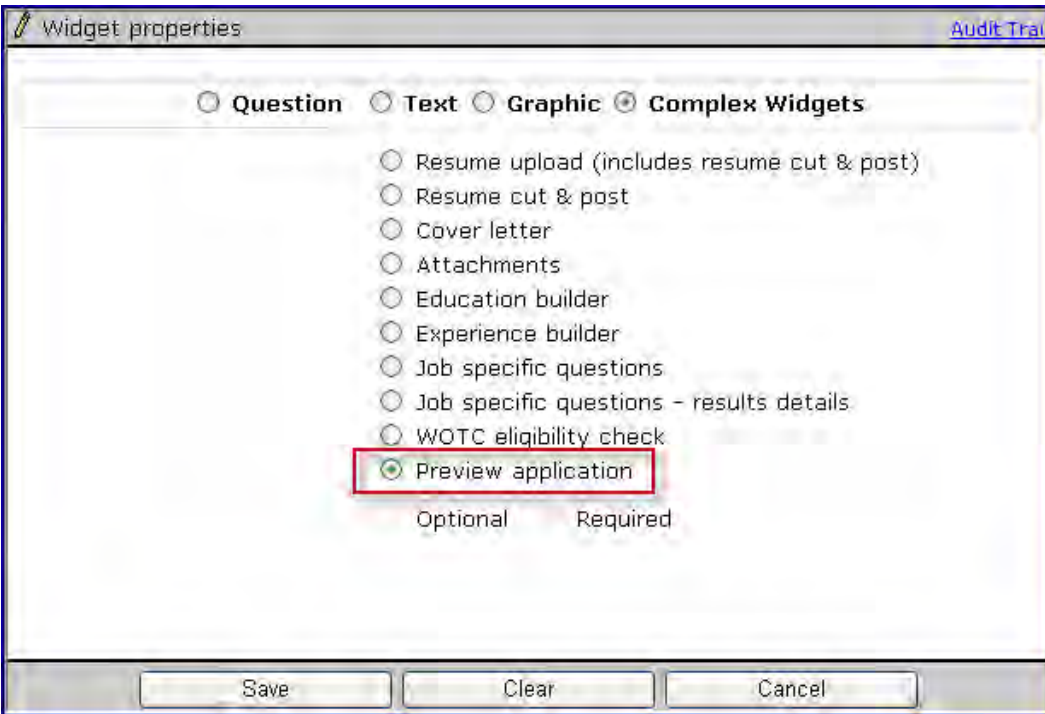
How Do Clients Get this Feature?

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

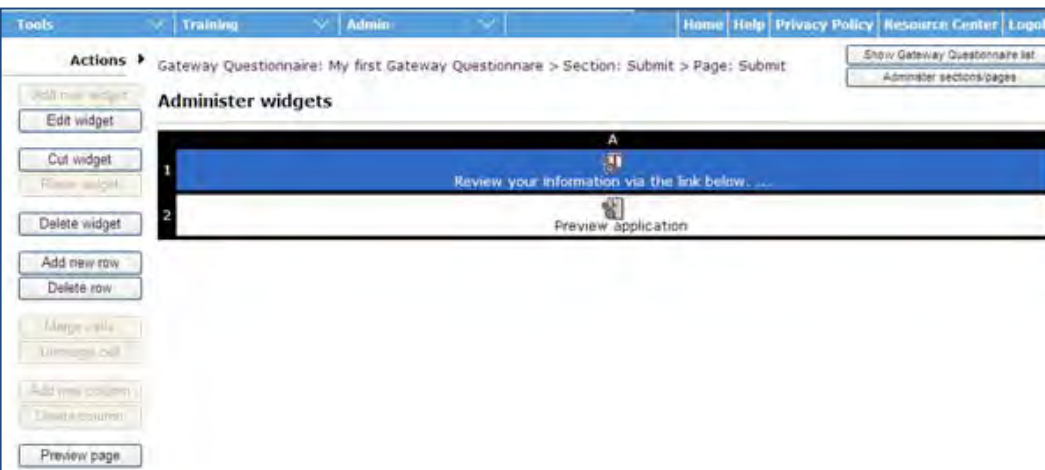
Workbench Self-Service Certified Users

Insert the new Preview application widget on the Submit page of the GQ to enable previewing by candidates.

1. Select **Tools > Gateway Questionnaires > Draft Questionnaires > Administer Sections/Pages** [of selected draft GQ]> **Administer Widgets** [for "Submit" page] > **Add/Edit Widget > Complex Widgets**.



2. Select **Preview application** widget.
3. Click **Save**. The Administer widgets page displays with the widget in place.



The following business rules are validated when you select the **Preview page** action on the Administer widgets page, or when you select the **Activate Gateway Questionnaire** action on the GQ list page:

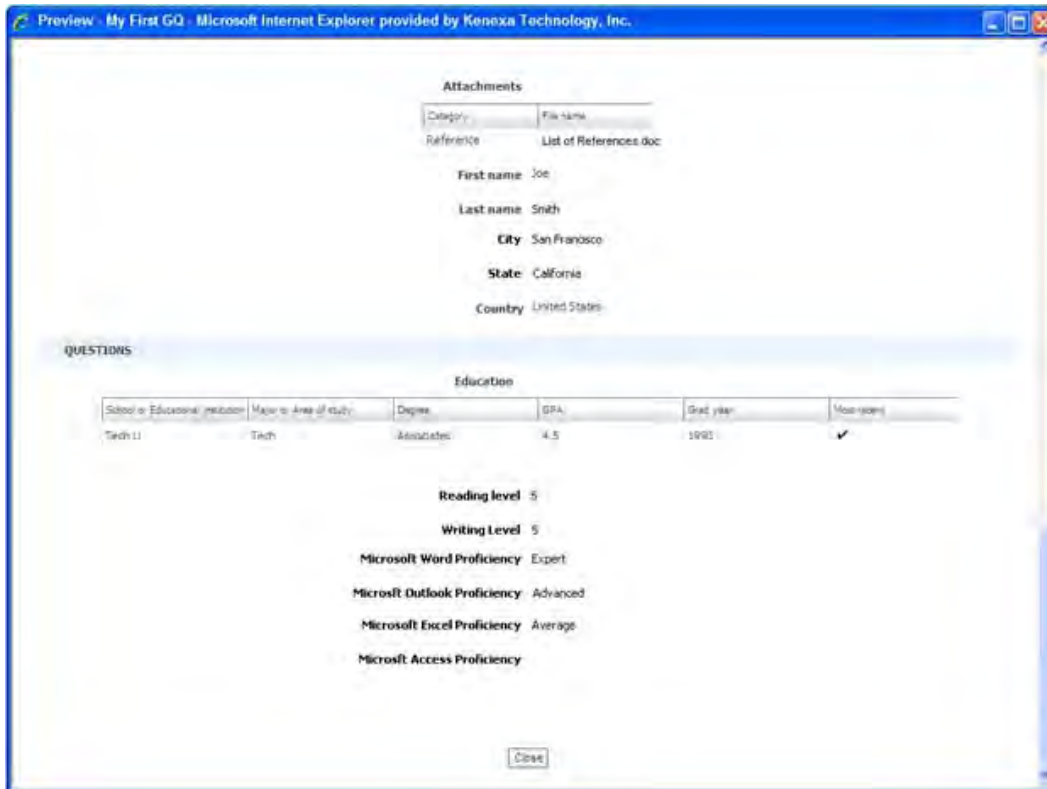
- For any path, you can include only one Preview application widget.
- You can place the Preview application widget only on the “Submit” page.
- The only other widgets you can place on the same page are text or graphics widget types.

The widget appears in the GQ as linked text that, when clicked, will launch a child window with the text: “This window will display a preview of the application.”

4. Activate the GQ when ready to use it with the new widget.

The Preview page that the candidate sees:

- Includes a **Close** button for when the candidate is finished reviewing the preview.
- Sections that have been configured to appear in the progress bar (in Section Properties – General > Section Name > "Section appears in Progress bar") appear in the preview as labels.
- Text of the resume displays below the "Resume/CV" label where the Resume Upload or Resume cut & post widget is configured in Workbench.
- Text of the cover letter displays below the "Cover Letter" label in the order that the cover letter widget is configured in Workbench.
- “Attachments” table appears where the Attachment widget was placed in the GQ, under the "Attachments" label
- “Education” and “Experience tables appear below the “Education” or “Experience” label within the preview only if the “Education builder” widget or “Experience builder” widget was placed in the GQ.
- The Job Specific Questions appear as Question widgets appear, where the Job Specific Question or JSQ - Detailed Results widget was placed in the GQ
- Page color for the “Preview” pop up window will respect the Talent Gateway custom color (if set) of “Background color”.




Hiding Global Help Link in Top Navigation Bar

This feature allows clients to hide the global Help link in the top navigation bar in the New User Interface (UI).

Product	<ul style="list-style-type: none"> 2x BrassRing Workbench Self-Service
Release 13.1 RDP616	<ul style="list-style-type: none"> New UI
Visible Changes	<ul style="list-style-type: none"> No – requires specific conditions / configuration for visibility.
How do I get this feature?	<ul style="list-style-type: none"> Configuration required – contact your Kenexa Support Team for implementation details.

Feature Description

This feature allows clients to hide the global Help link for specific user types on all new UI pages. Clients can optionally configure custom help links to use in place of the standard help document provided through the global help link, but custom help link configuration is not required to use this feature.



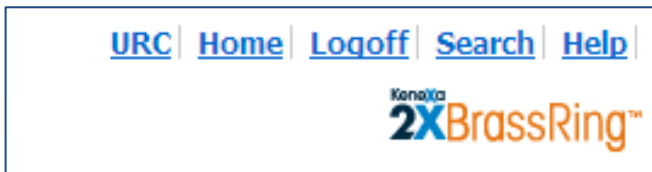
Clients do not have to configure custom help links in place of the Global Help Link. Feature configuration only impacts the visibility of the Global Help Link and does not impact any other Help links within the 2xB application.

Currently in 2xB, when a 2xB user clicks the global Help link, a pdf help document displays describing how to navigate the user interface.



2x BrassRing User Experience

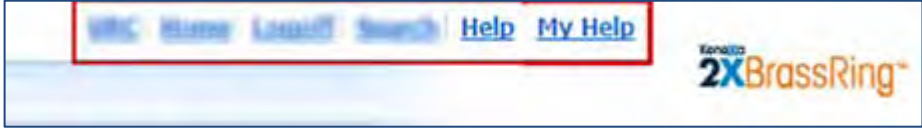
Currently the 2xB top navigation bar displays the Help link.



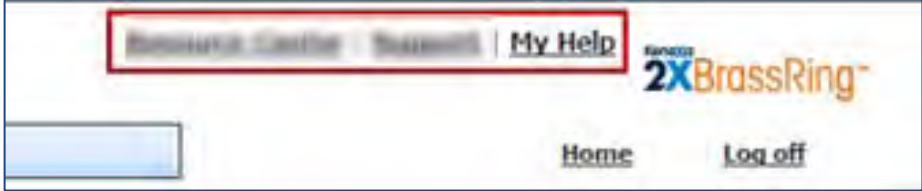
With this feature configured, the Help link does not display.



In this alternate scenario, the client has configured the custom My Help link to display with the default global Help link.



With this feature configured, only the custom My Help link displays.



How Do Clients Get this Feature?

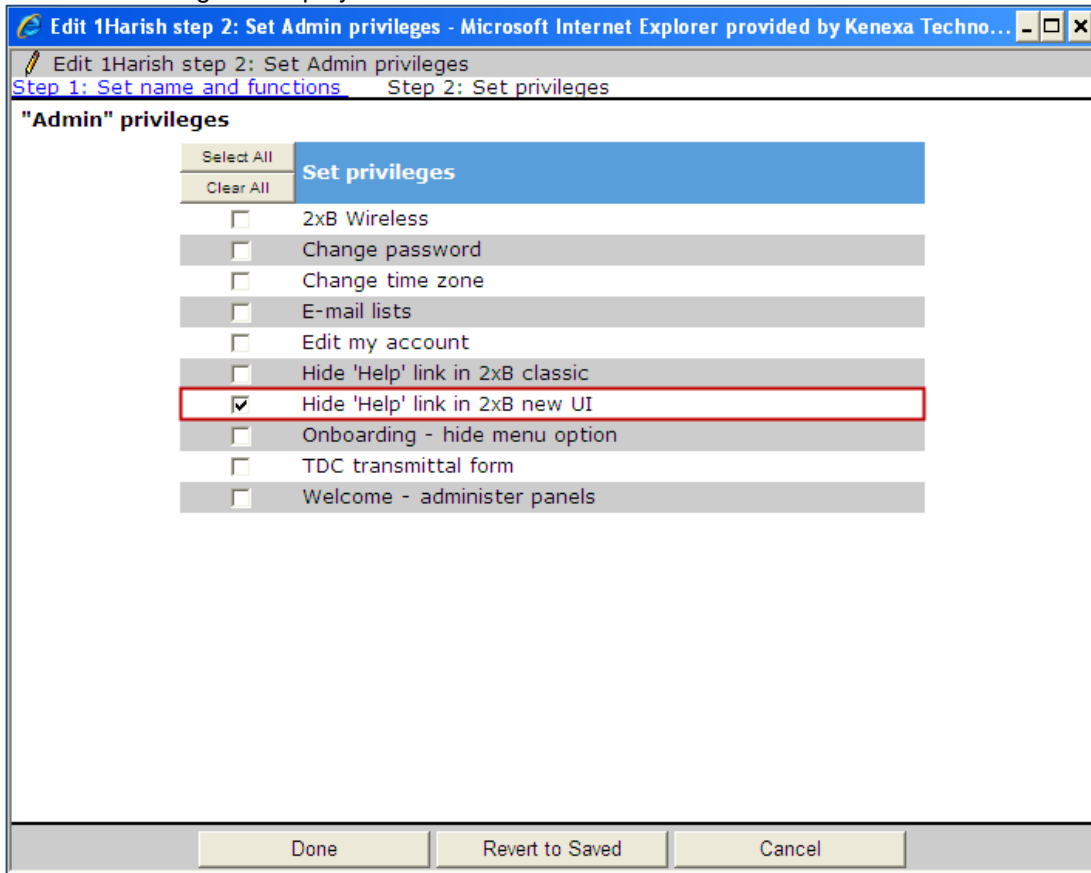
This feature is controlled by a new user type privilege. Please contact your Kenexa Support Team or Certified Workbench User for more information.

Workbench Self-Service Certified Users

WBSS users configure this new user privilege.

1. **Tools > Users > User Types.**
2. Select a user and click the **edit type permissions** pencil icon. The set name and functions dialog box displays.

3. Click the **set privileges** icon for Admin.
The Admin dialog box displays.



4. Select the **Hide Help Link** in 2xB new UI checkbox.
5. Click **Done**.
6. Click **Save**.

Imports – XML Req and XML JCDD Enhancements

XML JCDD and XML req imports now support these functions for existing reqs when the req team already contains some members: add member, remove member, and replace all team members.

Product RDP614 Release 13.1	↳ 2x BrassRing	↳ Imports
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

If configured, XML JCDD and XML req imports now support these functions for existing reqs when the req team already contains some members: add member, remove member, and replace all team members.

XML Req Import: Req team

Users can add, remove, and replace all req team members via Req import XML, if any of the following new structures are added to the XML:

- Replace all req team members(s) with a new list
- Remove and Add one or multiple req team member(s)

The existing functionality to *not* update req team members when the team is not empty will remain if the existing XML is used in Req Import XML *post*.

XML JCDD Import: Req Team

Users add, remove and replace all req team members via JCDD import XML, if any of the following new structures are added to the XML:

- Replace all req team members(s) with a new list
- Remove and Add one or multiple req team member(s)

The existing functionality to *not* update req team members when the team is not empty will remain if the existing XML is used in JCDD Import XML *post*.

XML JCDD Import: Approval

The JCDD import XML now supports the removal of default approvers.

JCDD import XML also supports all the same business rules as the current UI.

How Do Clients Get this Feature?

This feature requires that Import reqs be configured for the client, and the new XML structure should be included in the Req Import XML and the JCDD Import XML to enable this functionality. Please contact your Kenexa Support Team for more information about enabling this feature.

Kenexa Tasks

The following are sample XML structures for those administering the imports:

Req import XML structure for “replace” action

New "action" attribute with value "replace" for req XML import replaces whole req team with the list of employees provided.

- Provide at least one name as least one member is required in the req team.
- No "add" or "remove" nodes are allowed when using the “replace” value.

```
<TEAM action="replace">
  <EMPLOYEEID></EMPLOYEEID>
  <EMPNAME></EMPNAME>
</TEAM>
```

Req import XML structure for “remove” and “add” (remove or add or do both for one or multiple individuals)

Include “<remove>” and “<add>” nodes inside the TEAM to add and remove req team members. You can remove, add, or both remove and add.

- If “<remove>” and/or “<add>” nodes are included in the TEAM node, no "action" attribute is allowed in the TEAM node. <EMPLOYEEID>" and "<EMPNAME>" nodes are allowed only inside <remove> and <add> nodes.

```
<TEAM>
  <remove>
    <EMPLOYEEID></EMPLOYEEID>
    <EMPNAME></EMPNAME>
  </remove>
  <add>
    <EMPLOYEEID></EMPLOYEEID>
    <EMPNAME></EMPNAME>
  </add>
</TEAM>
```

JCDD import XML structure for “replace”

New "action" attribute in the <TEAM> node with value "replace" ,replaces whole req team with the list of employees provided.

- Provide at least one name, as least one member is required in the req team.
- No "add" or "remove" nodes are allowed when using the “replace” attribute value.

```
<TEAM action="replace">
  <EMPLOYEEID></EMPLOYEEID>
  <EMPNAME></EMPNAME>
</TEAM>
```

JCDD import XML structure for “remove” “add”

Include “<remove>” and “<add>” nodes inside the TEAM to add and remove req team members. You can remove, add, or both remove and add.

- If “<remove>” and/or “<add>” nodes are included in the TEAM node, no “action” attribute is allowed in the TEAM node. “<EMPLOYEEID>” and “<EMPNAME>” nodes are allowed only inside <remove> and <add> nodes.

```
<TEAM>
  <remove>
    <EMPLOYEEID></EMPLOYEEID>
    <EMPNAME></EMPNAME>
  </remove>
  <add>
    <EMPLOYEEID></EMPLOYEEID>
    <EMPNAME></EMPNAME>
  </add>
</TEAM>
```

JCDD import XML structure for approval “remove” action

Specify “action” attribute with value “remove” for APPROVALGROUP to remove the approver from approval group.

- Each approval group you want to update requires a node APPROVALGROUP, where either “name” attribute or “id” attribute is defined. The value of “name” attribute must be approval group name and value of “id” attribute must be ID of your approval group.

```
<APPROVERS type=”standard”>
  <APPROVALGROUP name=”T First Line Manager” action=”remove”>
</APPROVALGROUP>
</TEAM>
```


Integrations – 2x Assess

As part of the initial market release of Kenexa’s 2x Assess in June 2012, a standard integration will be available for 2xB clients in order to incorporate these new assessments into the candidate application experience.

Product LDP100 Post-Release 13.1	↳ 2x BrassRing	↳ Integrations - Assessments
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

Availability of a standard integration of Kenexa’s 2x BrassRing with 2x Assess is planned for June 2012. The integration mirrors what is available for KAS (ProveIt!, Selector, and PSL) via the existing “Searchable KAS” integration.

Key 2x Assess Features:

- Configurability of UI, Content, Reports
- Version Control of Content
- Updated User Interface
- Overall and Competency – Level Scoring

First Assessments

- Numerical Reasoning Test
- Logical Reasoning Test
- Verbal Reasoning Test
- Occupational Personality Inventory

Fall 2012

- Selectors

Late 2012

- Computer Adaptive Tests
- Simulations

How Do Clients Get this Feature?

Please contact your Kenexa Support Team for more information about enabling this feature.

Integrations – Authenticated Link on Forms

Some integrations with third-party vendors require access for 2xB users to external systems that hold sensitive candidate information. This requires proper authentication for access, which this feature provides. It allows for a text area field on a form to display a secured link to an external system. Clicking the link sends a request for authentication and redirects the user into the external system.

Product LDP096 Release 13.1	↳ 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

Some integrations with third-party vendors require access for 2xB users to external systems that hold sensitive candidate information. This requires proper authentication for access, which this feature provides. I

This project was targeted as a candidate form link to an assessment report residing outside of 2xB. Key features are:

- Text area field on a form can display a link to an external system
- Clicking the link authenticates and redirects the user into the external system.
- Candidate and form import allows for the text area field URL to be built by the external system (this requires additional assistance via a Professional Services Engineering project).



External system must comply with Kenexa's standard web service and XML structure to utilize this feature.

2xB User Experience

The overall feature allows the user to see a **Click here** link on the form. Clicking the link authenticates the user, and redirects the user to the appropriate landing page in the external system.



How Do Clients Get this Feature?

This feature requires a third-party vendor to import data via candidate import or form import. A Professional Services project would be needed for this. This also requires the Kenexa Support Team to set up the host. Certified Workbench users or Kenexa staff can set the new Text area field type attribute.

Workbench Self-Service Certified Users

A new **Integrated URL** attribute for text area field types on candidate forms lets you mask this field with a “Click here” link, and creates special handling in the background to integrate with an external system.

1. Select **Tools > Forms > Candidate forms > Administer form fields** [for selected form] > **Add new field/Edit field attributes** [for text area field type] > **Save and continue**.
2. For the **Integrated URL** attribute, select **Yes** (the default is **No**). This masks the display with “Click here” and creates the special handling.

Define field attributes [Audit Trail](#)

Field name: TextArea054

Field length: 4000

Required for form creation from TG: Yes No

Publish for use as autofill?: Yes No

Integrated URL: Yes No

Search / Output

Searchable?: Yes No

Outputable?: No

Used (TEXT)	Available (TEXT)	Enable Search & Output
126	-1	<input type="checkbox"/>

Buttons: Save, Revert to saved, Cancel

- When the selection is **Yes** for the field, it allows for special handling on candidate import and form import.
- When the field is imported, additional parameters are sent upon import, which then have the effect of constructing a special URL in the background, which, when clicked, initiates a web service call to the external system.

Kenexa Tasks

Kenexa staff handle setting up the host for the third-party vendor, as well as maintaining the Import XML. The vendor will also have involvement in this feature, as the entities creating the URL's and other data parameters needed to access the link successfully.

Workbench

Host Setup

1. Create the host for the vendor in **Tools > Integrations > Manage Hosts > Add/Edit Host**. Define static data (so the external system doesn't need to send it on import) such as the following:
 - Account Name (client account identifier from external system, sent in <clientaccount> node)
 - User Name (for web service authentication, sent in <username> node)
 - Password (for web service authentication, sent in <password> node)
 - Service URL (for web service –hen input, it will be used in place of the <url> node when that node is not sent for the form or candidate import and the vendor code sent upon import matches the vendor code in this host setup)
 - Type (select Standard Pass-through)
 - Vendor code – the vendor code that *external system* sends upon candidate or form import needs to be the same as the vendor code entered in the host setup here.
- To automatically send standard req fields to external system, check box for **Include req information**.
- To automatically send standard candidate fields to external system, check box for **Include candidate information**.

The screenshot shows the 'Add host' form in a web browser. The form is titled 'Add host' and contains several sections of input fields. The fields are: *Host name, *Contact name, Phone, *Email, Troubleshoot routing email, Host description, Hide contact information upon errors (checkbox), Hide system-generated error message from users (checkbox), Custom error text (text area), Default posting URL, Account Name, User Name, Password, Information link URL (export only), Service URL, Target URL, Type (dropdown), Host/Vendor Code (text field), Include req information (checkbox), and Include candidate information (checkbox). The 'Host/Vendor Code' field and the two checkboxes below it are highlighted with a red border.

2. Click **Save**.

Sample Text Area Field Import XML (for PSE Use)

Sets the attributes of the “Click here” link. This is available for candidate import or form import, and requires a Professional Services project.

```
<FormInput name="1966" title="Sample text area authenticated link">
  <linkinfo>
    <!--required; unique code for vendor; code must match the vendor code set up in Manage hosts in WB-->
    <vendor>vendor code</vendor>
    <!--required; unique id for transaction; used mainly for debugging-->
    <transactionId>1.1.1.1</transactionId>
    <!--optional; echoed back to vendor when link is clicked-->
    <passThrough>ReportID=3464262</passThrough>
    <!--optional; echoed back to vendor when link is clicked-->
    <queryString>v=1&aid=1&s=1&r=1&key=4db1dd16b62f8c731e4e4641743ac958</queryString>
    <!--following are optional; can be defined within Manage hosts section in WB (vendor code must match)-->
    <url>url hosting the web service</url>
    <includeRequisition>yes</includeRequisition>
    <includeCandidate>yes</includeCandidate>
  </linkinfo>
</FormInput>
```

Also see *LDP096_sample_formimport.xml* file for definitive XML.

Sample XML files for link request and response

For definitive XML, see the project folder files:

LDP096_sample_linkrequest.xml

LDP096_sample_linkresponse.xml.

Integrations – Background Check Tool Validations/Enhancements

The Background Check vendor, SkillSurvey, is now available to clients as a pre-configured background check vendor. SkillSurvey specializes in reference checking, and has been validated by a new Common Service Integration back-end tool, designed for easier integration with background check vendors.

For the GIS project, additional mappings from common services to GIS allow 2xB to map additional data, send to common services, and then pass it along to GIS. The following data elements can now be sent to GIS:

- Work state
- Suffix (separate from Last Name)
- Reference check data

Product RDP620 SkillSurvey, RDP610 GIS Release 13.1	<input type="checkbox"/> 2x BrassRing <input type="checkbox"/> Integrations - Internal
Visible Changes	<input type="checkbox"/> No – requires specific conditions / configuration for visibility.
How do I get this feature?	<input type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.

See the general configuration guide for more details – with links to SkillSurvey worksheet and to updated GIS worksheet:

<http://intappshare/TechSvcs/WorkbenchSetup%20Instructions/Forms/AllItems.aspx?RootFolder=%2fTechSvcs%2fWorkbenchSetup%20Instructions%2fPre%2dConfigured%20Integrations%2fBackground%20Check%20Partners%20%20%28first%20delivered%20with%20R12%2e2%29&View=%7b32100424%2dE8B7%2d4744%2dA517%2dEED28BFDA9C5%7d>

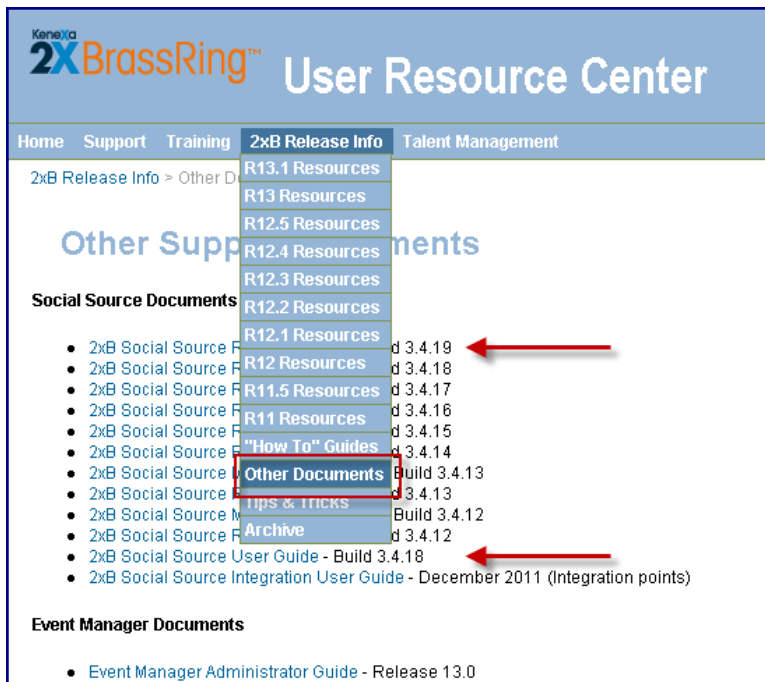
Integrations – Kenexa 2x BrassRing Social Source™

Kenexa 2x BrassRing Social Source™ is a sourcing and candidate relationship management solution that offers powerful integration with the 2x BrassRing® talent acquisition solution. Version/updates issued in the timeframe of 2x BrassRing’s Release 13.1 include versions 3.4.13 through 3.4.18. These updates have been incorporated into the latest Kenexa 2x BrassRing Social Source User Guide, posted on the User Resource Center (under “Other Documents” on the “2xB Releaser Info” tab.)

Product	↳ 2x BrassRing	↳ Integrations
LDP103 Release 13.1		
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

2x BrassRing Social Source provides the tools to build a pipeline of passive candidates, develop and manage relationships and convert qualified applicants into hires. Version/updates of Social Source issued in the timeframe of 2x BrassRing’s Release 13.1 include versions 3.4.13 through 3.4.18. These updates have been incorporated into the latest Kenexa 2x BrassRing Social Source User Guide, posted on the User Resource Center (under “Other Documents” on the “2xB Releaser Info” tab.) You will also find individual version release notes in the same location.



The latest version update to Social Source is Version 3.4.19, released May 25, 2012. This release contains a number of usability improvements and bug fixes, including:

- Enhanced CSV Upload History file to include more information for better historical tracking
- Improved LinkedIn profile viewing in a separate window to reduce visual interference within Social Source
- Easier lead handling, including loading a new lead with fewer clicks
- Easier processing of CSV files to upload leads
- The user can elect to see only his or her data on the home page, or all of the data within Social Source
- Users can now view the last 10 leads or campaigns added with a single click

Additional details are included in the Release Notes for Build 3.4.19.

Integrations – Kenexa Assessments Link Expiration

This feature controls the expiration of an assessment link on the 2xB side. The expired assessment will no longer display in the Talent Gateway “Pending Assessments” page as of the day after it expired.

Product RDP598 Release 13.1	<ul style="list-style-type: none"> ↳ 2x BrassRing ↳ New UI ↳ Workbench Self-Service ↳ Talent Gateways <p>Delete what you do not select</p>	<ul style="list-style-type: none"> ↳ Agency Manager ↳ Data Insight Tool ↳ SmartApproval ↳ Other <p>Delete what you do not select</p>
Visible Changes	<ul style="list-style-type: none"> ↳ No – requires specific conditions / configuration for visibility. <p>Delete what you do not select</p> <ul style="list-style-type: none"> ↳ Yes – details in <i>Visible Changes</i> document sent for each release build. 	
How do I get this feature?	<ul style="list-style-type: none"> ↳ Automatic – see details below. <p>Delete what you do not select</p> <ul style="list-style-type: none"> ↳ Specific conditions required – see details below. ↳ Configuration required – contact your Kenexa Support Team for implementation details. 	

Feature Description

Previously on the Talent Gateway “Pending Assessments” page, when candidates clicked the link for a pending assessment on the day it expired, they simply saw a blank screen. This occurred when the Kenexa Assessments system (expiring the assessment) and the 2xB system (displaying the link on the TG) were not yet re-synchronized.

This feature controls the expiration of an assessment link on the 2xB side. The expired assessment will no longer display in the TG “Pending Assessments” page as of the day *after* it expires. Candidates can access the assessment right up until that point, so should either be able to click the link and access, or will not see a link (after expiration). In addition, a new “Expired” status will indicate to 2xB users that an assessment has expired without the candidate’s completion.

Candidate Experience

Candidates who have applied on a Talent Gateway to jobs with associated assessments can log into the TG to access their pending Assessments. They select the Assessments link on the TG Welcome page. When an assessment has expired, the Pending Assessments page no longer displays it on that page the second day it expired. Only the active assessments display.



2xB User Experience

When this feature is enabled, an assessment that has expired has a new “Expired” status value that displays in the Action Log’s **Action** column on the candidate’s Talent Record (search or filter as necessary to display the desired assessment actions).

Talent Record: Buckley, Colby Actions ▾

691BR: LB Assessment Batch CMO Test

[Address 1](#)
[Location](#)
222-555-1212
cbuckley@mail.com

Candidate type: [External](#)
HR Status: [Reference Check](#)
HR status date: 03-Apr-2012
HR status updated by: Submission, System

Viewed (this req): N/A
Last viewed (global): N/A
Last viewed (global) by: N/A
Original date loaded: 03-Apr-2012

Contact Details | Resume/CV | Cover Letter | **Experience/Education**

Print | Edit

Submission History | **Action Log** Print | Search | Filter ▾

Action	Date	Action by	Details	Name/Type	From	To	Folder
Assessment Completed	04-Apr-2012	Buckley, Laurel	Result: 1%tile	LRT2 Main			691BR:LB Assessment Batch CMO Test
Form Added	04-Apr-2012	Buckley, Laurel	Form ID: 62547324	KAS Assessment			691BR:LB Assessment Batch CMO Test
Assessment Completed	04-Apr-2012	Buckley, Laurel	Result: 1%tile	NRT Main			691BR:LB Assessment Batch CMO Test
Form Added	04-Apr-2012	Buckley, Laurel	Form ID: 62547459	KAS Assessment			691BR:LB Assessment Batch CMO Test

How Do Clients Get this Feature?

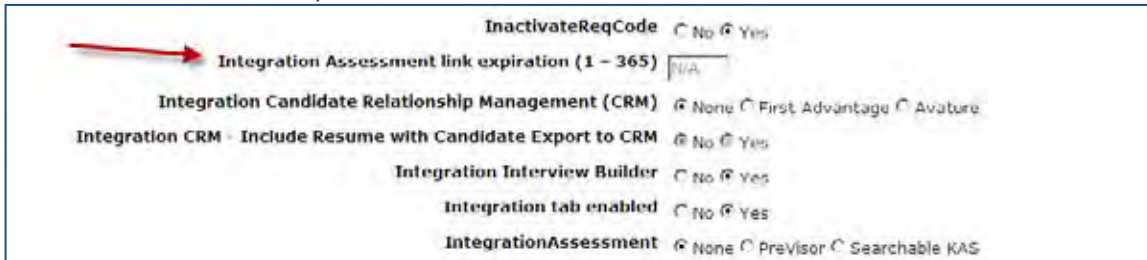
This feature is controlled by a new client setting. Please contact your Kenexa Support Team for more information about enabling this feature.

Kenexa Tasks

Workbench


New WB client setting: **Integration Assessment link expiration (1 – 365) = 1- 365**

Workbench > Admin > Manage clients > Edit client settings (for clients with Integration Assessment >Searchable KAS enabled).



InactivateReqCode	<input type="radio"/> No <input checked="" type="radio"/> Yes
Integration Assessment link expiration (1 - 365)	N/A
Integration Candidate Relationship Management (CRM)	<input checked="" type="radio"/> None <input type="radio"/> First Advantage <input type="radio"/> Avature
Integration CRM - Include Resume with Candidate Export to CRM	<input checked="" type="radio"/> No <input type="radio"/> Yes
Integration Interview Builder	<input type="radio"/> No <input checked="" type="radio"/> Yes
Integration tab enabled	<input type="radio"/> No <input checked="" type="radio"/> Yes
IntegrationAssessment	<input checked="" type="radio"/> None <input type="radio"/> PreVisor <input type="radio"/> Searchable KAS

Select the number of days the link should be available before expiring. For example if you select 10 days, the status of this assessment is updated to “Expired” on the 11th day.

 You can also set the “Days Until Assessment Rejection” field to a number of days. When that number is reached, the candidate’s HR status can be set to update to a status indicating “no longer being considered,” while still leaving the link “live.” For best practice, the client should have these two settings (“Days Until Assessment Rejection” and “Integration Assessment link expiration”) configured with a similar timeframe

If a candidate submits to a job, clicks on the “Click here to take any open assessments” link from the “Confirmation page,” then clicks on the assessment link from the “Pending Assessments” page and copies the KAS URL, the candidate could be able to continue taking the assessment after that assessment link is expired, but 2xB will ignore the results from KAS and will update the 2xB status to “Expired.”

Integrations – Quick Links to Onboarding Applications

This project allows organizations to accommodate more than one Onboarding vendor with pass-through authentication, using Quick Links.

Product RDP582 Release 13.1	↳ 2x BrassRing ↳ Workbench Self-Service	↳ Integrations – Onboarding
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

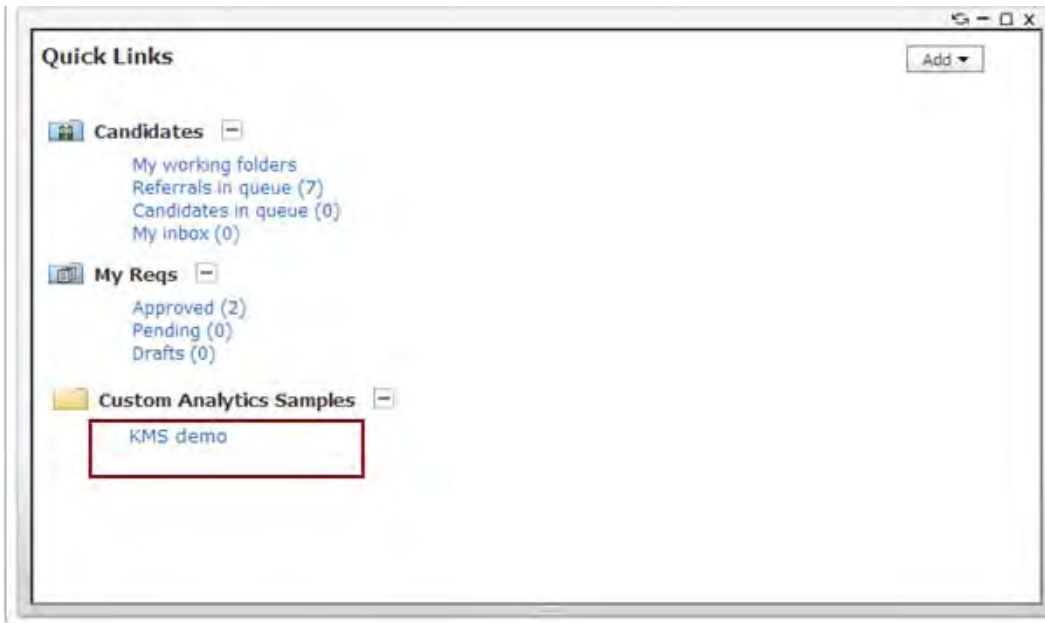
Previously, 2xB could be configured to have only one Onboarding vendor with pass-through authentication (via a menu item). Now organizations with multiple divisions that interact with different Onboarding vendors can be accommodated, by configuring links (on the Quick Links panel) to alternate vendors and hiding the menu item.

Key Workbench changes for this feature include:

- New user type privilege “Onboarding – hide menu option.” This privilege hides the Onboarding menu item in 2xB so that users access their vendor through their configured Quick Links link(s) instead.
- New host type “KMS” (added under Manage hosts in Workbench), and Host attributes needed to perform the vendor integration.
- Quick Links configuration that allows selection from the available hosts.

2xB User Experience

If an onboarding vendor link (such as KMS and/or 2xO) is configured for their Quick Links panel, users can see and use it there. Users who click the link are authenticated in the same way as through the menu item.



How Do Clients Get this Feature?

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

Workbench Self-Service Certified Users

Certified Workbench users can set the user type privilege and configure the Quick Links link once the vendor host configuration is in place.

User Type Privilege

Hide the Onboarding menu item in 2xB by setting the new Admin user type privilege, “**Onboarding – hide menu option.**”

Tools > Users > User types > Edit type permissions [for selected type] > Set privileges [for Admin function]

Step 1: Set name and functions Step 2: Set privileges

"Admin" privileges

Select All Set privileges

Clear All

- 2xB Wireless
- Change password
- E-mail lists
- Edit my account
- Onboarding - hide menu option
- TDC transmittal form
- Welcome - administer panels

Done Revert to Saved Cancel

Quick Links Configuration

Add links to onboarding hosts 2xO or KMS in Quick Links panel configuration (for access when menu item is hidden).

1. Select **Tools > Settings > Panel configuration > Administer configuration [for Quick Links panel] > Add/edit configuration**

Configuration name: KMS testing

Panel title: Quick Links [English (US)]

Allow users to add/remove links and categories

Select type: Quick Link Category Custom Category External Link

URL: [] Test

Select host: Host1 [KMS]

Text: KMS demo

Add

Configured panel contents

Actions	Type	Contents
1	External Link	KMS demo [ExternalSSO/IntegratedLinkProcessor.aspx?ssoname=kms]

View/Edit translations

2. Select **External link.**
3. Select the appropriate previously-created host. Available host types currently include 2xO, KMS, and Standard Pass-through. The host type is shown in brackets along with the host name (e.g., Host 1 [KMS]).
4. Enter the label for the link in **Text** field, click **Add** to add the row, and **Save.**

Kenexa Tasks

To set this feature up:

1. Kenexa staff manage the onboarding vendor hosts, including a new **KMS** host type and existing **2xO** host type available under Manage hosts.

Note: Existing KMS clients automatically will have the host created for them when this feature is released.

These tasks can be done by Kenexa or Workbench Self-Service users:

2. Hide the Onboarding menu item in 2xB by setting user type privilege “Onboarding – hide menu option”.
3. Add appropriate links to onboarding vendor(s) in Quick Links panel configuration (for access when menu item is hidden).

Manage Hosts

Configure necessary onboarding hosts: **Workbench > Tools > Integrations > Manage hosts > Add/Edit host.**

- Only one host of type **KMS** can be configured per client.
- Account name, User Name, Password and Service URL are mandatory fields for host type **KMS**.

The screenshot shows the 'Add host' configuration form. The form is titled '+ Add host' and contains the following fields and options:

- *Host name: [Text input]
- *Contact name: [Text input]
- Phone: [Text input]
- *Email: [Text input]
- Troubleshoot routing email: [Text input]
- Host description: [Text area]
- Hide contact information upon errors
- Hide system-generated error message from users
- Custom error text [Text area] [English - United States]
- Default posting URL: [Text input]
- Account name: [Text input]
- User name: [Text input]
- Password: [Text input]
- Information link URL: (export only) [Text input]
- Service URL: [Text input]
- Target URL: [Text input]
- Type: **KMS** [Dropdown menu]
- Host/Vendor Code: [Text input]
- Include req information
- Include candidate information

Buttons: Save, Clear, Cancel

See the **Kenexa 2x BrassRing® to 2x Onboard™ Integration Configuration Guide** in the Kenexanet Product Documentation Library (2x Onboard tab) for additional details on setup

Integrations – WOTC Automatic Data Processing (ADP)

Kenexa has partnered with Automatic Data Processing (ADP) to offer Work Opportunity Tax Credits (WOTC) services via a Web service integration with 2x BrassRing.

Product Release: 13.1 LDP025	↳ 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

This standard integration service of Kenexa 2x BrassRing and ADP offers clients Work Opportunity Tax Credits (WOTC) services. WOTC is a US federal tax hiring incentive (applicable to US only), heavily used in the high-volume hourly hiring process. The credits can be significant per hire, which represents great cost savings to companies.

The integration provides your organization with the means to obtain and submit required paperwork within federal time constraints and ensures candidates are asked the qualifying questions in order to receive the tax credits. When configured, WOTC questions can be displayed during the job application process from the Talent Gateway (TG) site or recruiters can send email communications using WOTC merge tokens inviting candidates to complete a WOTC eligibility screening as part of their continuing or new job application.

When a candidate completes the WOTC questionnaire, the WOTC results form that indicates a candidate's eligibility is accessible on the candidate's Talent Record. When a candidate is hired, clients can access the required WOTC tax forms, print them out for the candidate's signature, and forward the signed hard copy forms to ADP for tax credit processing.



Recent regulation changes now allow the WOTC 8850 form to accept eSignature. Clients are no longer required to print this form and have the candidate sign it. Any forms associated with additional credits will still be available for printing/sharing from 2X BrassRing.

WOTC Integration is available on Full Talent Gateways and Gateway Questionnaires.

Candidates

Candidates will automatically be presented with the tax credits questionnaire when the following is true:

- Talent Gateway has WOTC enabled
- Requisition has WOTC set to “Yes” and WOTC has a valid location selected
- If using a Gateway Questionnaire, the WOTC widget must also be present

For Talent Gateways, WOTC question screens display after the Attachments page and before the Additional Questions page. For Gateway Questionnaires, WOTC question screens display wherever the widget has been placed, although the widget must be placed after profile data, including after where the address is collected because this information is required for WOTC.

A cookie crumb “Tax Credits” progress bar displays when WOTC tax credits are used.

Candidate Experience

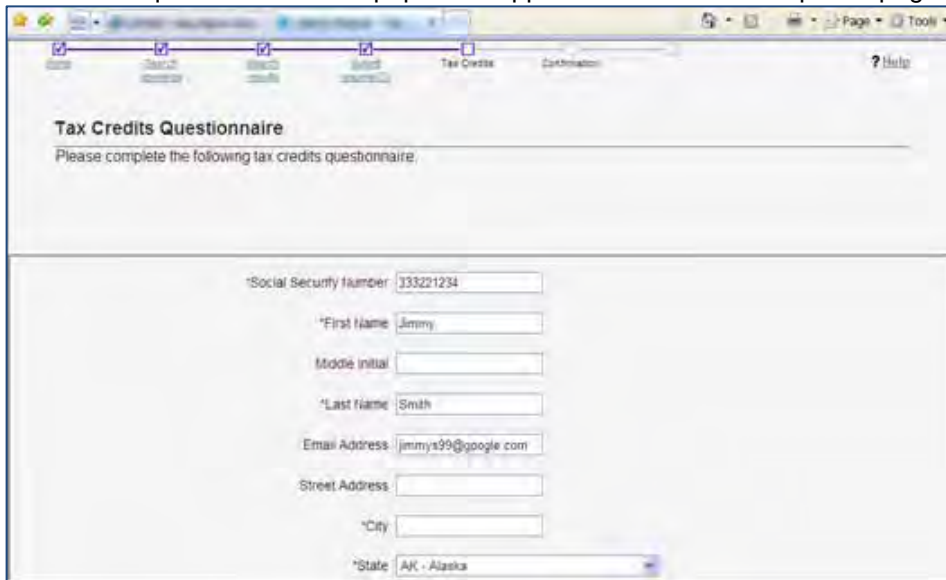
This section describes the candidate experience when a candidate has applied to a position that requires a WOTC eligibility check. This screen has configuration options using text customization.

In 2xB:

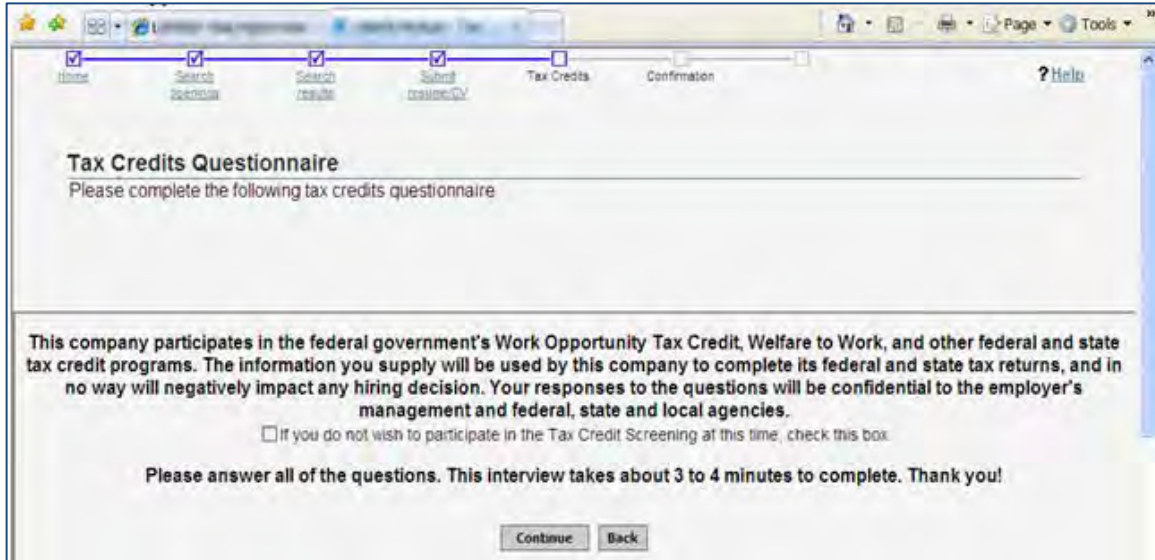
1. Candidate is prompted to initiate the WOTC questionnaire.
The SSN page displays:




2. Candidate completes the questions and clicks **Continue**.
The WOTC questionnaire auto-populates applicable fields from the profile pages.

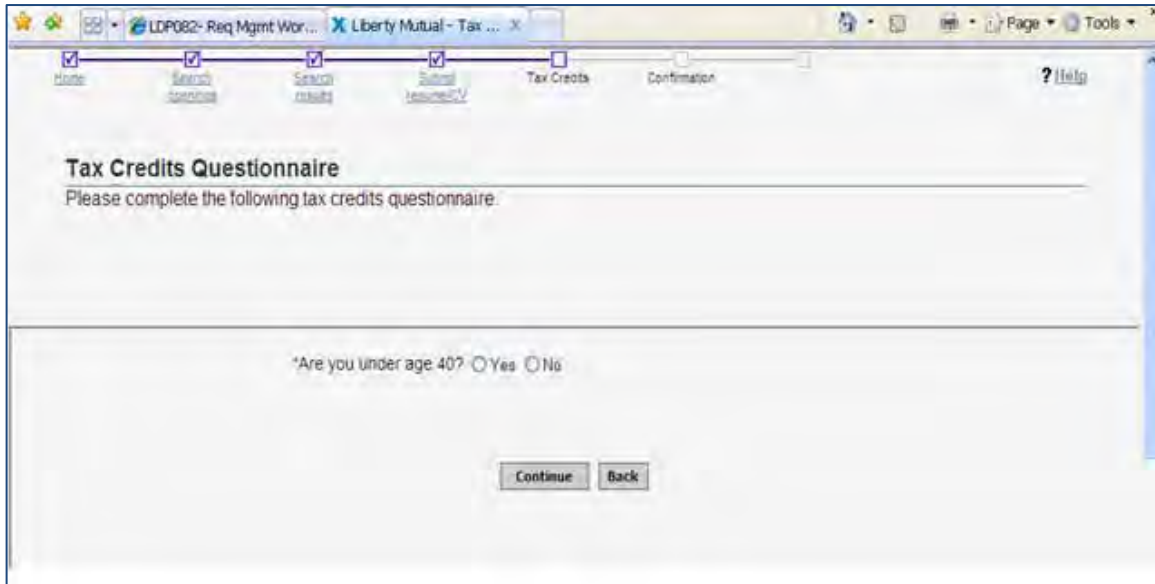


3. Candidate clicks **Continue**.
The Tax Credits Questionnaire permission page displays:



- Candidate clicks **Continue** to accept the WOTC questionnaire process, or selects the checkbox to refuse participation.

 **Note:** ADP recommends allowing candidates to opt out of the WOTC questionnaire with the ability to resend/open the questionnaire for any candidates who opted out during the initial application process.



- Candidate clicks continue to complete the required questions if they have chosen to complete the questionnaire.




6. Candidate clicks **Continue** and completes the WOTC tax eligibility process.

When candidate has completed the questionnaire, they are returned to the TG/GQ to complete the application or they receive a confirmation of their application. The WOTC results form that indicates a candidate's eligibility is added to the candidate's Talent Record.

For candidates who need to complete the WOTC questionnaire post-apply, 2xB users can send an email communication containing eLinks to the required TG-hosted WOTC questionnaire.

If a candidate is hired, a Rules Automation Trigger (RAM) notifies ADP. ADP updates the WOTC results form with a "Click Here" link to the required WOTC tax forms. Clients must access and print the hard-copy WOTC documents, obtain the candidate's signatures, and submit the signed forms to ADP for tax credit processing.

 **Note:** Recent regulation changes now allow the WOTC 8850 form to accept eSignature. Clients are no longer required to print this form and have the candidate sign it. Any forms associated with additional credits will still be available for printing/sharing from 2X BrassRing.



Notes

- When the candidate is going through a multiple job apply process where more than one job requires the WOTC questionnaire, the candidate will only go through one WOTC questionnaire. The same results will be copied to each of the requisitions applied to.
- If your organization has Save Draft enabled, the button will be hidden on the Tax Credits screen.
- If, due to configuration, the WOTC page is also the Submit page, the Submit button will be disabled until the WOTC questionnaire is complete to ensure the candidate does not inadvertently submit their application before completing the questionnaire.
- If the candidate has completed the WOTC questionnaire within the past 60 days, they will not be required to complete it again. Results already on file will be retrieved.

Candidates will automatically be presented with the tax credits questionnaire when the following is true:

- Talent Gateway has WOTC enabled
- Requisition has WOTC set to “Yes” and WOTC has a valid location selected

2xB User Experience

2xB users add the WOTC eligibility check to their requisitions by setting the WOTC custom field on the requisition to “Yes.” Enabling this field launches the WOTC questionnaire when candidates apply. The location field is required.

Once a candidate applies, the configured WOTC candidate results form is attached to the Talent Record for any candidate who was presented with the tax credits screen. The form indicates whether the candidate is eligible or if they opted out of participating. You access the WOTC form on the Talent Record Forms tab.



The screenshot shows a web browser window titled "WOTC Results - 5152BR : WOTC Req 5 for alexafour, ...". The page content includes the following information:

- Applicant IDA: 71400453
- Screen Date: 15-Jul-2011
- Applicant Name: linc alexafour
- Tax Credits Eligible: Yes
- Opt Out: No
- WOTC Results: [Click here](#)

Date added	07-Jul-2011	Submission, System ()
Last action	15-Jul-2011	Submission, System ()

A "Close" button is located at the bottom center of the window.

Best Practice Recommendations

When enabling the WOTC functionality on a requisition, it is recommended to select a value for the WOTC location field.

Limitations and Known Issues

WOTC Tax Credit feature:

- cannot be used with jobless apply

- is only available on Full Talent Gateways
- is only available on US based English and Spanish 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.

Clients must have a direct relationship with ADP to use the WOTC service. Please contact your Kenexa Support Team for details on initiating a new relationship.

Workbench Self-Service Certified Users

Once configured during the setup process, the **WOTC Eligibility Check** custom req field must be added to req templates so it can be selected when appropriate reqs are created. Additionally, your client-specific custom requisition field that indicates the job's location in WOTC's required format must also be added to the req template.

1. **Tools > Forms > Reqs > Req forms > Administer req fields [for selected template] > Select custom req fields**
2. Select the **WOTC Eligibility Check** and custom WOTC Location fields.
3. Click **Save**.

2x BrassRing Admin/Admin+ Users

When the WOTC integration is set to Yes, 2xB Administrators can create email templates using WOTC merge tokens. The merge tokens represent two types of eLinks: a "Click here" hyperlink (#WOTC_URL#) or a full URL (#WOTC_RAWURL) that can be pasted into the candidate's browser. Using both WOTC merge tokens in candidate communications ensures a candidate can access and complete the WOTC questionnaire.

2x BrassRing Users

When 2xB administrators configure email templates using the WOTC merge tokens, 2xB users can now use those email templates and WOTC merge tokens to send email communications to candidates to facilitate the WOTC application process.

Kenexa Tasks

Configuration includes:

- [New client setting](#)
- [TG Text customization](#)
- [Two new custom Req fields](#)
- [One TG Admin setting](#)
- [Gateway Questionnaire Widget](#)
- [Candidate Form](#)
- [Maintenance Tickets](#)
- [Two RAM Triggers](#)



Note: Use Ctrl+Click to jump to each section. Use ALT+LEFT ARROW to return to your point of origin.

Workbench

Client Setting

New WB client setting **Work Opportunity Tax Credit Integration**

1. **WB > Admin > Manage Clients > Edit client settings.**

When the client setting is set to **Yes**, it cannot be disabled if there are:

- Any Talent Gateways with the “WOTC Integration” Admin setting enabled; or
- Any db fields are mapped for use with the WOTC integration.

VersionTGbasic 2.0

Years exp\Grad year config Display both min and max search field

Work Opportunity Tax Credit Integration No Yes

Restricted Settings: These Settings are not available for general use

When the client setting is set to Yes a new req custom field “WOTC eligibility check” is automatically created. This field must be added to the req and be verify enabled. Req template

Talent Gateway Text Customization

Talent Gateway text customization allows you to customize displayed when a candidate begins the WOTC process.

1. **WB > Admin > Talent Gateway > Text customization.**

2. Scroll to the WOTC tab.

3. Complete the Page Title and Instruction Text fields.



Note: For the ADP integration, **DO NOT** check either the Enable Opt Out or Display Exit Link checkboxes.

4. (Optional) If applicable, check the Default site checkbox. Checking this box ensures the WOTC questionnaire is available to candidates who do not apply through a Talent Gateway but need to complete the WOTC questionnaire at a later date.

Custom Req Field

When the client setting “WOTC Integration” is first set to “Yes” a new custom Req field, “WOTC eligibility check” is automatically created. This field should be required, must be attached to the requisition, and must be Verity enabled. Req template should have the Single select Req custom **Location** field with the valid locations provided by the vendor and be verity enabled.

An additional client specific custom requisition field needs to indicate the job’s location in WOTC’s required format and also be Verity enabled. **Best practice is to make this a single-select.** The ID is sent to the ADP and should match the list ADP is expecting for the client.



Note: ADP requires an hourly rate Req custom text field value when hiring candidates.

1. Tools > Forms > Reqs > Req Forms > Define Custom Req Fields

Define the new custom req fields:

- Database name = WOTC. Cannot be modified when the client setting “Work Opportunity Tax Credit Integration” is set to “Yes”.
- Field name = WOTC Eligibility Check.
- Type = radio button. Cannot be modified.
- Custom report field = No.
- Posting interface mapping = None.
- Instruction type = None.
- Font size = Medium.
- Encrypted = No. Cannot be modified.
- HR status restrictions = No.

Define new custom req field - Microsoft Internet Explorer p... i...

+ Define new custom req field

Placement 63

*Database field name WOTC

Field name WOTC Eligibility Check [English (US)]

*Type Radio Button

Custom report field Yes No

Posting interface mapping None

Instruction type None

Font size Medium

Encrypted Yes No

HR status restrictions Yes No

Save and continue>> Clear Cancel

In order to make the fields Verity enabled, complete the following fields in the Define Field Attribute dialog box.

1. Edit the field attributes for Database field name WOTC. Save and continue.
2. Select the Yes radio buttons for Searchable and Outputable.
Selecting Yes enables and saves the "Enable Search and Output" and maps the fields to Verity.
3. Complete the remaining fields.
 - Field length = 255
 - Searchable = Yes
 - Outputable = Yes (When these are set to "Yes", and the checkbox for "Enable Search & Output" is selected and Saved, the fields have been mapped to Verity)
 - Enable Search & Output – box is checked.
 - Maintain Custom List is selected
 - Options for Yes and No are automatically created. The list is not editable.
 - Enable Field Associations – by default there is nothing configured, however, clients can set up associations for the field.

Define field attributes - Windows Internet Explorer

Define field attributes [Audit Trail](#)

Field name WOTC

Field length

Search / Output

Searchable? Yes No

Outputable? Yes No

Used (TEXT)	Available (TEXT)	Enable Search & Output
<input type="text" value="1"/>	<input type="text" value="149"/>	<input type="checkbox"/>

Options source

Maintain Custom List

Pull options from existing list

Field associations

Enable association Parent Child

Display full list with default selection

Talent Gateway Admin Setting

The new **WOTC Integration** setting (Special Configuration option) controls whether the TG presents the WOTC questionnaire when reqs with WOTC set to “Yes” are posted to it.

In order for the questionnaire to launch:

- WOTC integration setting must be checked
- WOTC field on the req must be set to Yes
- WOTC location field must be populated

Tools > Talent Gateways > Admin

Launch assessment(s) via new window (used when TG is hosted within iFrame on client site)


Auto-launch assessments (only with assessment batches)

Default "Preferred Candidate Score" with max GQ score (excludes JSQ)

WOTC Integration

When the WOTC Integration option is enabled, and the req “WOTC” field is set to “Yes,” then the candidate will be presented with the WOTC questionnaire. The candidate will be prompted to respond just after the Attachments page in the TG, prior to the Additional Questions page. In the non-GQ flow, the questionnaire

launches after the Attachments page, before the Questions page and matches the look and feel of the Talent Gateway.

 **Note:** If the Tax Credits is the last step before Submit, the page button states **Continue** rather than **Submit**.

Business Rules

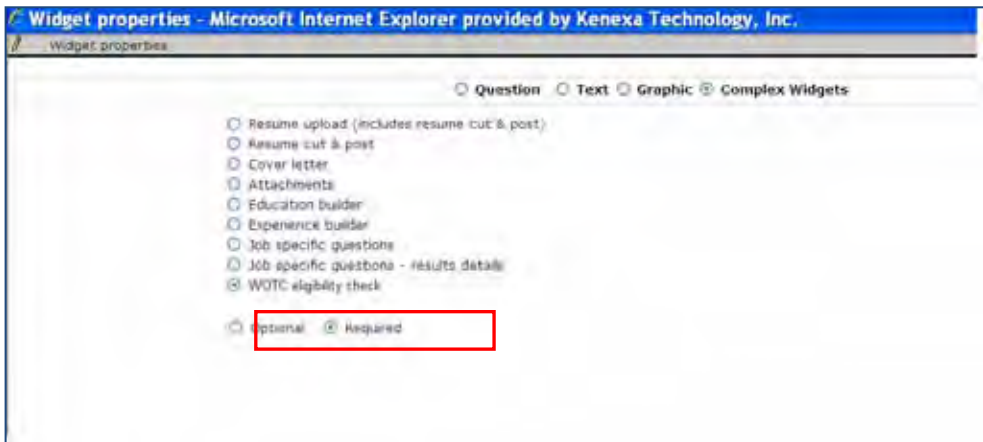
- The option is disabled if the client setting “WOTC Integration” is set to “No.”
- Tax credits will not work with jobless apply.

Gateway Questionnaire Widget

A new complex widget, **WOTC eligibility check**, indicates where in the application process the candidate will be presented with the WOTC questionnaire.

Tools > Gateway Questionnaires > Administer Widgets

1. Select the radio box for WOTC eligibility check.



Business Rules

- The widget must be on its own page.
- The widget requires the following profile fields precede it: firstname, lastname, address, city, state, zip (this information is needed to initiate the WOTC questionnaire, recommendation is to make the fields required).
- The TG setting must be checked and the WOTC req field must be set to Yes in order for the questionnaire to launch.
- The WOTC location field must be populated.

Candidate Form

A new candidate form, WOTC Results, is created to store a candidate's WOTC eligibility results when the client setting WOTC Integration is enabled. Form privileges need to be configured for each client.

1. **Tools > Forms > Candidate Forms**

Candidate Form Fields

The following fields on the WOTC form are **NOT** applicable for the ADP Integration and should be hidden for all users:

- WOTC_FED_CR
- WOTC_ST_CR
- LAST_EDITED_BY (not shown)

Maintenance Tickets

Two maintenance tickets must be created for this integration. Create the second maintenance ticket after configuring the two RAM triggers, as a completion step for the second RAM trigger.

To create the maintenance ticket:

1. Create a project ticket.
2. Create a Work ticket from the project ticket and assign it to: Queue – Engineering, Type – Maintenance.
3. Ensure the ticket contains the following:
 - Client Name
 - Staging or Production
 - WOTC Vendor Name (ADP)
 - WOTC Company ID (must get this from ADP)
 - Name of Requisition field(s) that will be used for WOTC Location and Hourly Rate
 - Username/Password for client to access vendor's system (must get this from ADP)

Two RAM Triggers

Two RAM triggers must be created, one to obtain eligibility results and one to obtain a client's Hired status.

Eligibility Results:

A RAM trigger must be created to get the candidate's WOTC eligibility results. This occurs within a few minutes of a candidate's submittal.

1. Create a RAM trigger with a Triggering Mechanism = "Form Insert or Update". The trigger should be based on the "WOTC Results" form and named to reflect its use, WOTC Eligibility Check.

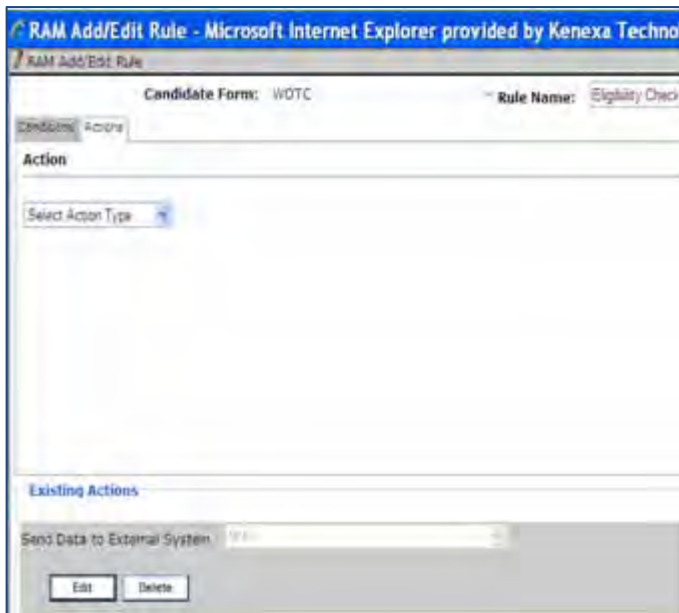
The screenshot shows the 'Rules Automation Manager' window. The configuration for a new rule is as follows:

- Trigger Name:** WOTC Eligibility
- Triggering Mechanism:** Candidate Form Insert or Update
- Select Trigger Event:** Selected (T) [List...]
- Trigger Delay (hrs):** 0
- Trigger Context:** None

Below the configuration, the 'Candidate Form' is set to 'WOTC'. There is an 'Add Rule' button. The 'Defined Rules (in sequence)' list contains two rules:

- Eligibility Check [Edit] [Delete]
- Req Template 2 [Edit] [Delete]

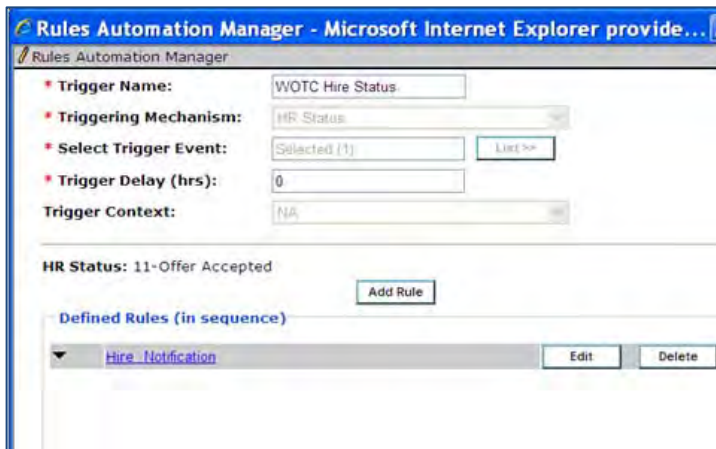
2. Within the trigger, create 1 rule for each Req template containing the WOTC field:
 - Rule name – if multiple Req templates are impacted, it may help to include the template name
 - Conditions – Check for Req template with WOTC enabled
– WOTC form field "LAST_EDITED_BY" = "Submission, System"
 - Action Types: – "Populated Field Values" update WOTC form field
– "LAST_EDITED_BY" to Manager Automation
– "Send Data to External System" (engineering will add this)



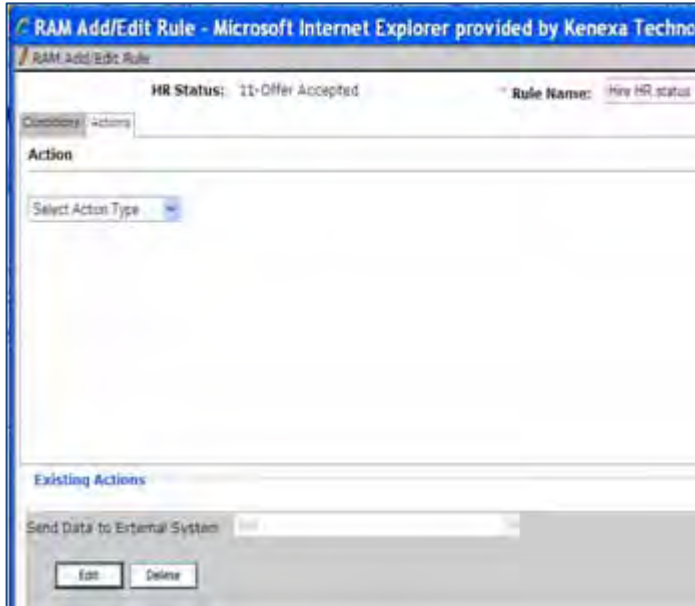
Hired Status

An additional RAM trigger must be created to notify ADP of the applicant's hire status and to receive back the required tax eligibility forms.

1. Create a RAM trigger with a Triggering Mechanism = "HR Status". The trigger should be based on the client's Hired status.



2. Within the trigger, create 1 rule, for each Req template containing the WOTC field:
 - Rule name – "HIRE NOTIFICATION" (or similar) if multiple Req templates are impacted, it may help to include the template name
 - Conditions – Check for Req template with WOTC enabled
 - Action Types: – Send Data to External System" (engineering will add this)



3. Create a maintenance ticket requesting assistance with the RAM WOTC trigger set up. (This is the second maintenance ticket required.)

Include the following information in the maintenance ticket:

- Client Name
- Staging/Production
- Name of Trigger created for WOTC
- Form fields where Start Date and Hourly Rate are stored (these are required and must be captured on a candidate form. The Start Date must be completed ;prior to the HR status being updated to hired status

Integrations – WOTC Ernst & Young (EY)

Kenexa has partnered with Ernst & Young (E&Y) to offer Work Opportunity Tax Credits (WOTC) services via a Web service integration with 2x BrassRing.

Product Release: 13.1 LDP 097	↳ 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

This standard integration service of Kenexa 2x BrassRing and E&Y offers clients Work Opportunity Tax Credits (WOTC) services. WOTC is a US federal tax hiring incentive (applicable to US only), heavily used in the high-volume hourly hiring process. The credits can be significant per hire, which represents great cost savings to companies.

The integration provides your organization with the means to obtain and submit required paperwork within federal time constraints and ensures candidates are asked the qualifying questions in order to receive the tax credits. When configured, WOTC questions can be displayed during the job application process from the Talent Gateway (TG) site or recruiters can send email communications using WOTC merge tokens inviting candidates to complete a WOTC eligibility screening as part of their continuing or new job application.

When a candidate completes the WOTC questionnaire, the WOTC eligibility results form that indicates eligibility status is accessible on the candidate's Talent Record. When a candidate is hired, clients can access the required WOTC tax forms, print them out for the candidate's signature, and forward the signed hard copy forms to E&Y for tax credit processing.



Note: Recent regulation changes now allow the WOTC 8850 form to accept eSignature. Clients are no longer required to print this form and have the candidate sign it. Any forms associated with additional credits will still be available for printing/sharing from 2x BrassRing.

WOTC Integration is available on Full Talent Gateways and Gateway Questionnaires.

Candidates

Candidates will automatically be presented with the tax credits questionnaire when the following is true:

- Talent Gateway has WOTC enabled
- Requisition has WOTC set to “Yes”
- If using a Gateway Questionnaire, the WOTC widget must also be present

For Talent Gateways, WOTC question screens display after the Attachments page and before the Additional Questions page. For Gateway Questionnaires, WOTC question screens display wherever the widget has been placed, although the widget must be placed after profile data, including after where the address is collected because this information is required for WOTC.



Note: Profile and address fields are required.

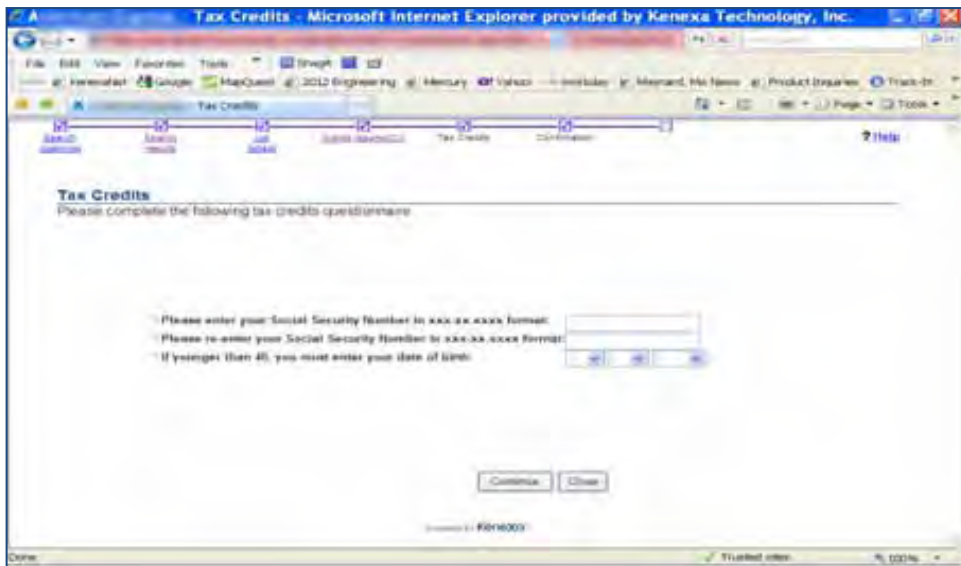
A cookie crumb “Tax Credits” progress bar displays whenever WOTC tax credit questionnaires are used.

Candidate Experience

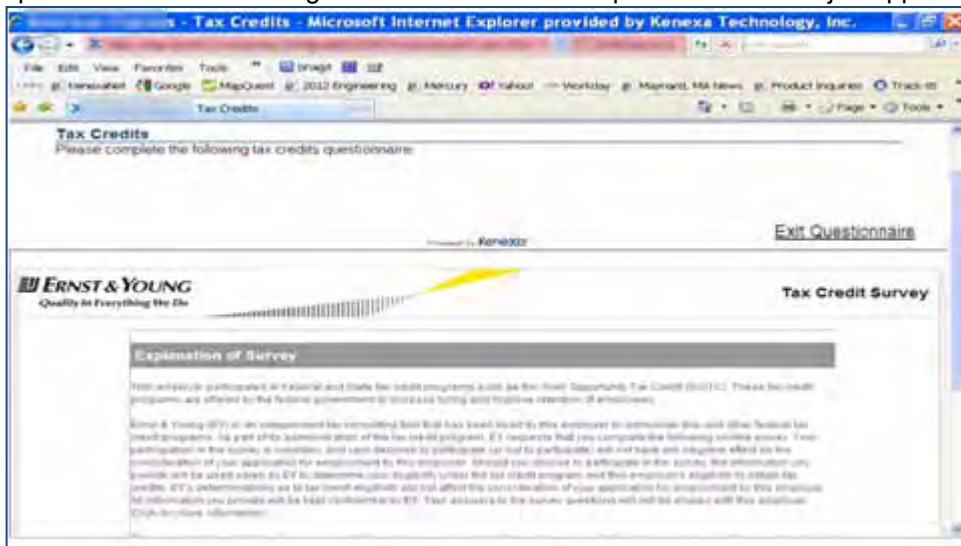
This section describes the candidate experience when a candidate has applied to a position that requires a WOTC eligibility check. This screen has configuration options using text customization.

In 2xB:


1. Candidate applies for a position and lands on the WOTC Tax Credit Questionnaire:
The SSN page displays:



2. Candidate enters the requested information and clicks **Continue**.
The WOTC questionnaire introduction displays. Clients can choose to configure the Exit questionnaire option. Candidates clicking the Exit Questionnaire option return to the job application.

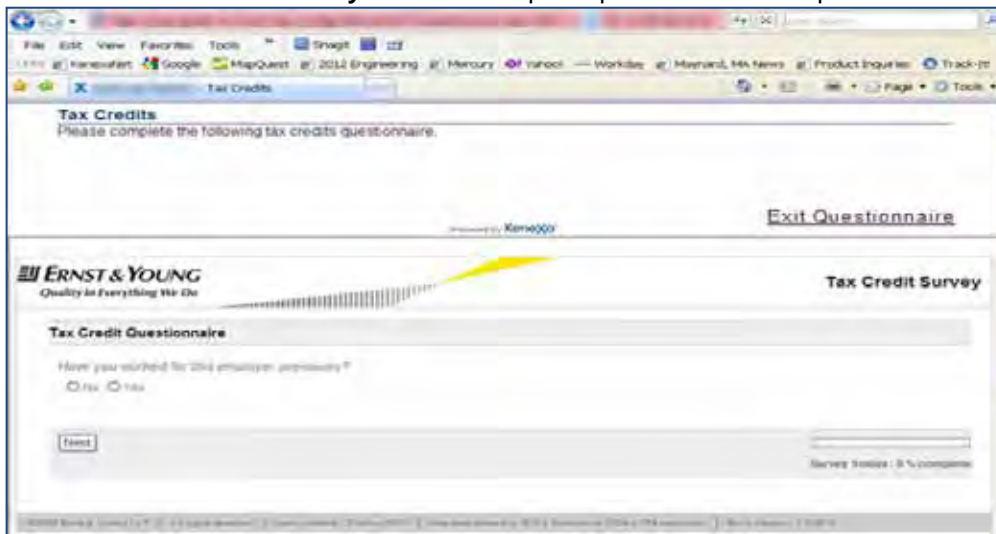


Based on the client's requirements, clients can configure an opt out option at the bottom of the introduction screen.

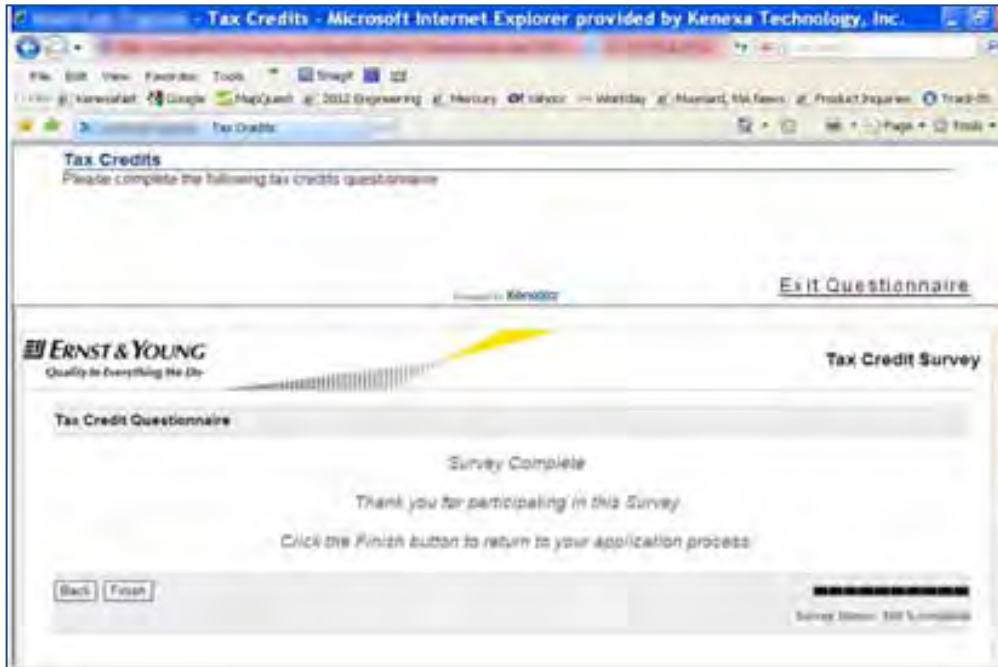
 For this integration, E&Y will manage the presentation of the Opt Out feature. It is **NOT** configured on the Talent Gateway.



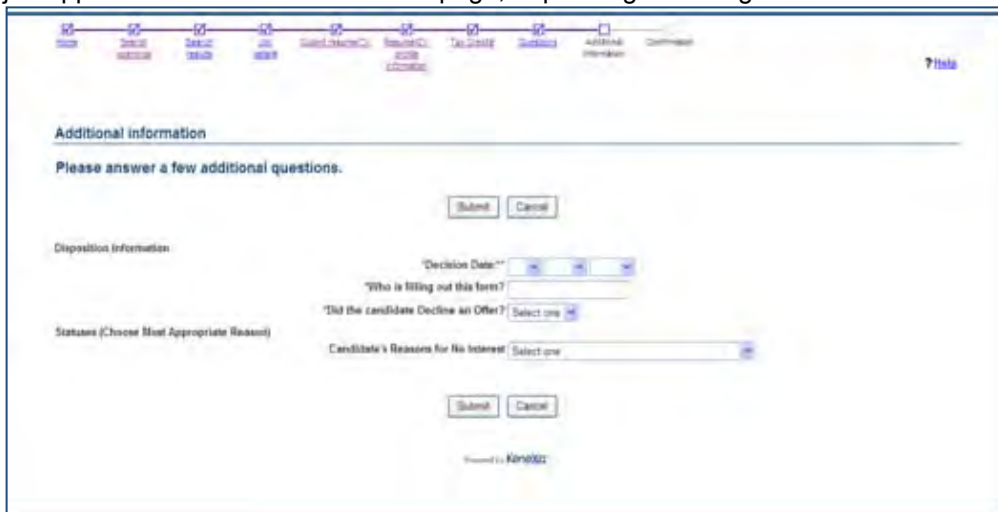
3. Candidate clicks **Take Survey** and elects to participate. The WOTC questionnaire begins.



4. Candidate clicks **Next** answering the series of questions. A Survey Status progress bar displays in the lower right-hand corner. The system notifies the candidate when the survey is complete.




- Candidate clicks **Finish** and is returned to the TG/GQ to complete the remainder of the job application or to the confirmation page, depending on configuration.



The WOTC results form that indicates a candidate's eligibility is attached to the candidate's Talent Record on the Attachments tab.



For candidates who need to complete the WOTC questionnaire post-apply, 2xB users can send an email communication containing WOTC merge tokens (eLinks) to the required TG-hosted WOTC questionnaire. The look and feel of the WOTC questionnaire will match the job application process.

 **Note:** Recent regulation changes now allow the WOTC 8850 form to accept eSignature. Clients are no longer required to print this form and have the candidate sign it. Any forms associated with additional credits will still be available for printing/sharing from 2x BrassRing.

If a candidate is hired, a Rules Automation Trigger (RAM) notifies E&Y. E&Y then sends the required WOTC tax forms to the Attachment tab of the candidate's Talent Record. Clients must access and print the hard-copy WOTC documents, obtain the candidate's signatures, and submit the signed forms to E&Y for tax credit processing.

Notes

- When the candidate is going through a multiple job apply process where more than one job requires the WOTC questionnaire, the candidate will only go through one WOTC questionnaire. The same results will be copied to each of the requisitions applied to.
- If your organization has Save Draft enabled, the button will be hidden on the Tax Credits screen.
- If, due to configuration, the WOTC page is also the Submit page, the Submit button will be disabled until the WOTC questionnaire is complete to ensure the candidate does not inadvertently submit their application before completing the questionnaire.
- If the candidate has completed the WOTC questionnaire within the past 60 days, they will not be required to complete it again. Results already on file will be retrieved.

Candidates will automatically be presented with the tax credits questionnaire when the following is true:

- Talent Gateway has WOTC enabled
- Requisition has WOTC set to “Yes” and WOTC has a valid location selected

2xB User Experience

2xB users add the WOTC eligibility check to their requisitions by setting the WOTC custom field on the requisition to “Yes.” Enabling this field launches the WOTC questionnaire when candidates apply. The location field is required.

Once a candidate applies, the configured WOTC candidate results form is attached to the Talent Record for any candidate who was presented with the tax credits screen. The WOTC form indicates whether the candidate is eligible or if they opted out of participating. You access the WOTC form on Attachment tab of the Talent Record.

Best Practice Recommendations

When enabling the WOTC functionality on a requisition, it is recommended that two custom req fields, WOTC Eligibility Check and Location, be set as required. Both custom req fields **must** be Verity enabled. Best Practice is to make the Location field single-select.

During TG text customization, select the Display Exit Link checkbox to enable the Exit Link. In the WOTC questionnaire workflow, clicking this link returns the candidate to the TG/GQ.

Limitations and Known Issues

WOTC Tax Credit feature:

- cannot be used with jobless apply
- is only available on Full Talent Gateways
- is only available on US based English Gateways

When enabling the “Default site for WOTC access for non-logged in with profile with matching locale setting,” only one TG per language can have this feature enabled

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 and for details on initiating a new relationship. .

Workbench Self-Service Certified Users

Once configured during the setup process, the **WOTC Eligibility Check** custom req field must be added to req templates so it can be selected when appropriate reqs are created. Additionally, your client-specific custom requisition field that indicates the job’s location in WOTC’s required format must also be added to the req template.

1. **Tools > Forms > Reqs > Req forms > Administer req fields [for selected template] > Select custom req fields**
2. Select the **WOTC Eligibility Check** and custom WOTC Location fields.
3. Click **Save**.

2x BrassRing Admin/Admin+ Users

When the WOTC integration is set to Yes, 2xB Administrators can create email templates using WOTC merge tokens. The merge tokens represent two types of eLinks: a “Click here” hyperlink (#WOTC_URL#) or a full URL (#WOTC_RAWURL) that can be pasted into the candidate’s browser. Using both WOTC merge tokens in candidate communications ensures a candidate can access and complete the WOTC questionnaire.

2x BrassRing Users

When 2xB administrators configure email templates using the WOTC merge tokens, 2xB users can now use those email templates and WOTC merge tokens to send email communications to candidates to facilitate the WOTC application process.

Kenexa Tasks

Configuration includes:

- [New client setting](#)
- [Talent Gateway Text Customization](#)
- [Two new custom Req fields](#)
- [One TG Admin setting](#)
- [One new GQ widget](#)
- [Candidate Forms](#)
- [Candidate Form Fields](#)
- [Candidate Import Subscription](#)
- [Code Types](#)
- [Maintenance Ticket](#)
- [Two RAM Triggers](#)



Note: Use Ctrl+Click to jump to each section. Use ALT+LEFT ARROW to return to your point of origin.

Workbench

Client Setting

New WB client setting **Work Opportunity Tax Credit Integration**

1. **WB > Admin > Manage Clients > Edit client settings.**

When the client setting is set to **Yes**, it cannot be disabled if there are:

- Any Talent Gateways with the “WOTC Integration” Admin setting enabled; or
- Any db fields are mapped for use with the WOTC integration.

VersionTGbasic 2.0

Years exp\Grad year config Display both min and max search field

Work Opportunity Tax Credit Integration No Yes

Restricted Settings: These Settings are not available for general use

Talent Gateway Text Customization


Talent Gateway text customization allows you to customize displayed when a candidate begins the WOTC process.

1. **WB > Admin > Talent Gateway > Text customization.**

2. Scroll to the WOTC tab.




3. Complete the Page Title and Instruction Text fields.

 **Note:** For the E&Y integration, **DO NOT** check the Enable Opt Out.

4. **(Highly Recommended)** Select the Display Exit Link checkbox to enable the Exit Link. When a candidate clicks this link, the candidate is returned to the TG/GQ.
5. Check the Default site checkbox. Checking this box ensures the WOTC questionnaire is available to candidates who do not apply through a Talent Gateway but need to complete the WOTC questionnaire at a later date. Restriction: Only one TG per language can have this enabled.

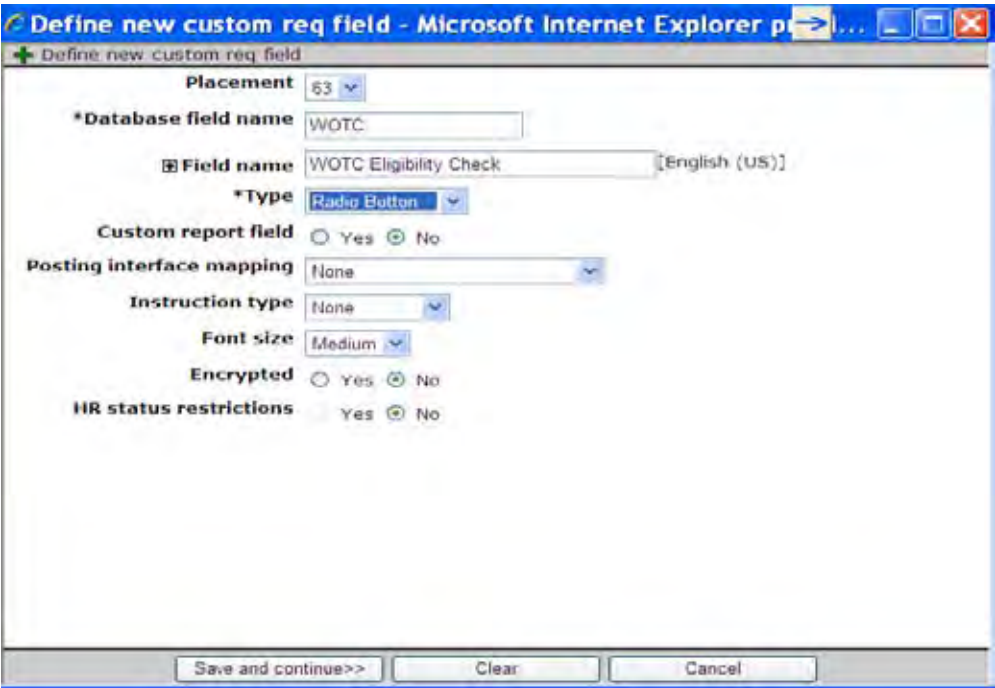
Custom Req Field

When the client setting “WOTC Integration” is first set to “Yes” a new custom Req field, “WOTC Eligibility Check” displays.

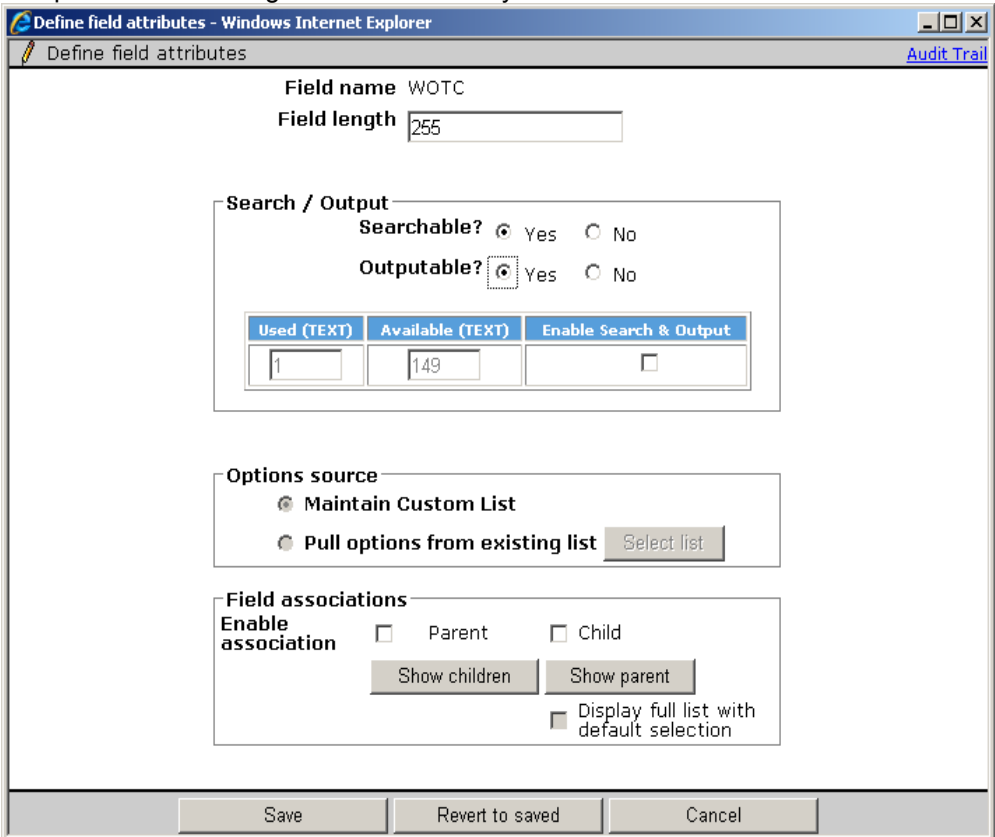
 **Note:** This req field is **Required** and **must** be attached to the req and be Verity enabled.

An additional client-specific custom requisition field needs to be used to indicate the job’s location in WOTC’s required format. This must also be Verity enabled. **Best practice is to make this a single-select.** The ID is sent to E&Y, so should match the list they are expecting for the client.

1. **Tools > Forms > Reqs > Req Forms > Define Custom Req Fields.**
2. Select **Save and Continue** on the Define new custom req field dialog box in order to edit the req field attributes of the WOTC Eligibility Check field.



3. Select the **Yes** radio button for Searchable and Outputable.
4. Complete the remaining fields as necessary.

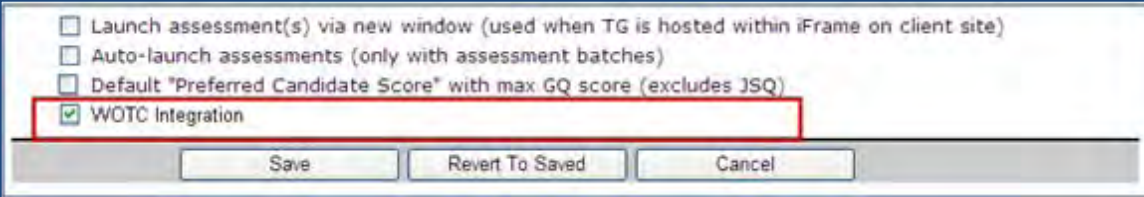


5. Click **Save**. The WOTC Eligibility Check req field is now mapped to Verity.

Talent Gateway Admin Setting

The new **WOTC Integration** setting (Special Configuration option) controls whether the TG presents the WOTC questionnaire when reqs with WOTC set to “Yes” are posted to it. The setting must be checked.

1. **Tools > Talent Gateways > Admin.**
2. Select the checkbox for WOTC Integration.



3. Click **Save**.
4. When the WOTC option enabled, and the req “WOTC” field is set to “Yes,” and the location field populated, the candidate will be presented with the WOTC questionnaire. In a non-GQ flow, the questionnaire launches after the Attachments page in the TG, prior to the Additional Questions page. The questionnaire matches the look and feel of the TG.



Note: If the Tax Credits questions are the last step before Submit, the page button states **Continue** rather than **Submit**.

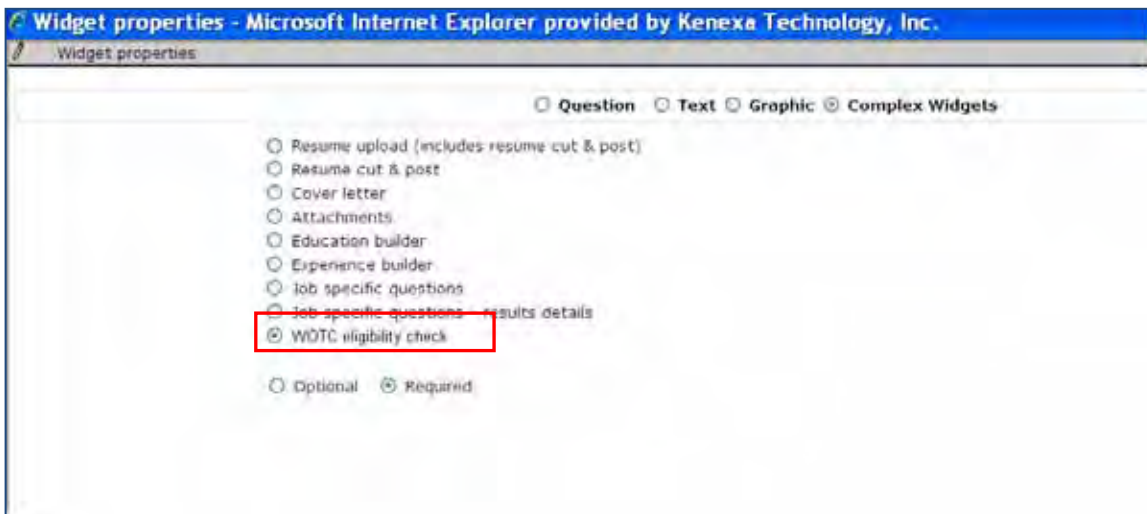
Business Rules

- The option is disabled if the client setting “WOTC Integration” is set to “No.”

Gateway Questionnaire Widget

A new complex widget, **WOTC eligibility check**, indicates where in the application process the candidate will be presented with the WOTC questionnaire.

1. **Tools > Gateway Questionnaires > Administer Widgets.**
2. Select the radio button or WOTC eligibility check.
3. Select the radio button Required.



4. Ensure that your configuration adheres to the following business rules:

Business Rules

- The widget must be on its own page, there cannot be any other widgets on a shared page.

- When the widget is selected, the “Required” attribute will automatically be selected.
- The widget requires the following profile fields precede it: firstname, lastname, address, city, state, zip (this information is needed to initiate the WOTC questionnaire, recommendation is to make the fields required).
- The widget will be respected when the TG Admin setting “WOTC integration” is enabled AND the custom Req field “WOTC” is set to “Yes.” In this case, the candidate will be moved into the WOTC eligibility check when arriving on the GQ page with the GQ widget. It is also a best practice to have the WOTC location field populated.

Candidate Forms

A new candidate form, WOTC Results, is created to store a candidate’s WOTC eligibility results. Form privileges need to be configured for each client.

1. Tools > Forms > Candidate Forms.

All fields can be manually updated unless otherwise noted.

- Database Title = WOTC. This is not editable
- Title = WOTC Results.
- Disclaimer = blank
- Search = No selection
- Output = No selection
- Email = blank
- Approval process = No. This is not editable.
- Form Multiples = Single Per Candidate/Req Combination. This is not editable.
- Send existing form in edit mode = No. This is not editable.

- Gateway candidate integration form? = No. This is not editable.
- Create form from TG = IGNORE all... This is not editable.
- Erase with candidates = Set with standard default
- Enable language toggle = Set with standard default
- Event Manager Event Form = No. This is not editable.
- Add/View/Modify My = No selection.
- View All = No selection
- Modify – my reqs = No selection. This is not editable.
- Modify all = No selection. This is not editable.

All the fields on the special “WOTC” form must have these business rules applied at all times, irrespective of the client setting. Only at form level inactivation/deletion must the client setting must be considered.

Candidate Form Fields

The following fields are added to the form. The following fields are **NOT** applicable for the E&Y Integration and should be hidden for all users:

- WOTC_FED_CR
- WOTC_ST_CR
- WOTCResults1
- WOTC_OUTPUT
- LAST_EDITED_BY (not shown)

Other fields’ privileges should be configured as desired by client.

Administer form fields: [WOTC]

VIEW: [[Active fields](#) | [Inactive fields](#)]

Showing 6 fields

Select	Order	Database field name	Display name	Primary field	Field type	Searchable	Deletable	Verify enabled	Encrypt	Sort type	Custom report field	Edit field attributes	Administer field settings
<input type="checkbox"/>	1	WOTC_APPID	Applicant ID		text	No	No	No	No	N/A	No		
<input type="checkbox"/>	2	WOTC_SCRNDATE	Screen Date		date	No	No	No	No	N/A	No		
<input type="checkbox"/>	3	APP_NAME	Applicant Name		text	No	No	No	No	N/A	No		
<input type="checkbox"/>	4	WOTC_FED_CR	Federal Credits		text	No	No	No	No	N/A	No		
<input type="checkbox"/>	5	WOTC_ST_CREDIT	State Credits		text	No	No	No	No	N/A	No		
<input type="checkbox"/>	6	WOTC_GFTOUT	Opt Out		text	No	No	No	No	N/A	No		

Business Rules

DB field name	Display name	Field type	Length or Date	Searchable	Outputable	Verify enabled	Encrypt	Sort type
Not editable	Editable	Not editable	Not editable	=No (all fields)	=No (all fields)	=No (all fields)	=No (all fields) & Not editable	=N/A (all fields)

None of the fields can be inactivated/deleted if the client setting “Work Opportunity Tax Credit Integration” is set to Yes. All fields will be hidden for all languages by default (this can be modified by privileged WB users).

Values

Order	Database field name	Display name	Field type	Length or Date	Notes
1	WOTC_APPID	Applicant ID	Text	255	This will be populated with the ApplicantID returned by partner (First Advantage)
2	WOTC_SCRNDATE	Screen Date	Date	25 years up/ 25 years down	This will be populated with the date the candidate completed the questionnaire, the current date on the date the form is created
3	APP_NAME	Applicant Name	Text	255	The candidate’s name in Lastname, Firstname MI format

Candidate Import Subscription

Create a new candidate import subscription for WOTC.

1. **Tools > Integration > Admin.**

2. Add Integration Type = “Candidate Import” if not already created
3. Under Subscription admin add new: create Subscription and Manifest names, Stacking Logic is required, other items are optional (names must be ALL CAPS)
4. Select “DefaultVendor” for subscriber
5. Click **Save**.

Code Types

Tools > Settings > Code Types.

Create a new WOTC code for both Import and Source code types. If these code types do not exist, you must create the Import and Source types first.

Maintenance Ticket

Two maintenance tickets must be created for this integration. Create the second maintenance ticket after configuring the two RAM triggers, as a completion step for the second RAM trigger.

To create the maintenance ticket:

1. Create a project ticket.
2. Create a Work ticket from the project ticket and assign it to: Queue – Engineering, Type – Maintenance.

3. Ensure the ticket contains the following:

- Client Name
- Staging or Production
- WOTC Vendor Name (E&Y)
- WOTC Company ID (must get this from E&Y)
- Name of Requisition field(s) that will be used for WOTC Location (must get this list and format from client or E&Y)
- Username/Password for client to access vendor's system (must get this from E&Y)

Two RAM Triggers

Two RAM triggers must be created, one to obtain eligibility results and one to obtain a client's Hired status.

Eligibility Results:

A RAM trigger must be created to get the candidate's WOTC eligibility results. This occurs within a few minutes of a candidate's submittal.

1. Create a RAM trigger with a Triggering Mechanism = "Form Insert or Update". The trigger should be based on the "WOTC Results" form and named to reflect its use, WOTC Eligibility Check.

The screenshot shows the 'Rules Automation Manager' interface. The 'Trigger Name' is 'WOTC Eligibility'. The 'Triggering Mechanism' is 'Candidate Form Insert or Update'. The 'Select Trigger Event' is 'Selected (1)'. The 'Trigger Delay (hrs)' is '0'. The 'Trigger Context' is 'None'. Below these fields, the 'Candidate Form' is 'WOTC'. There is an 'Add Rule' button. Below the 'Add Rule' button, there is a section titled 'Defined Rules (in sequence)'. This section contains two rules: 'Eligibility Check' and 'Req Template 2'. Each rule has 'Edit' and 'Delete' buttons.

2. Within the trigger, create 1 rule for each Req template containing the WOTC field:

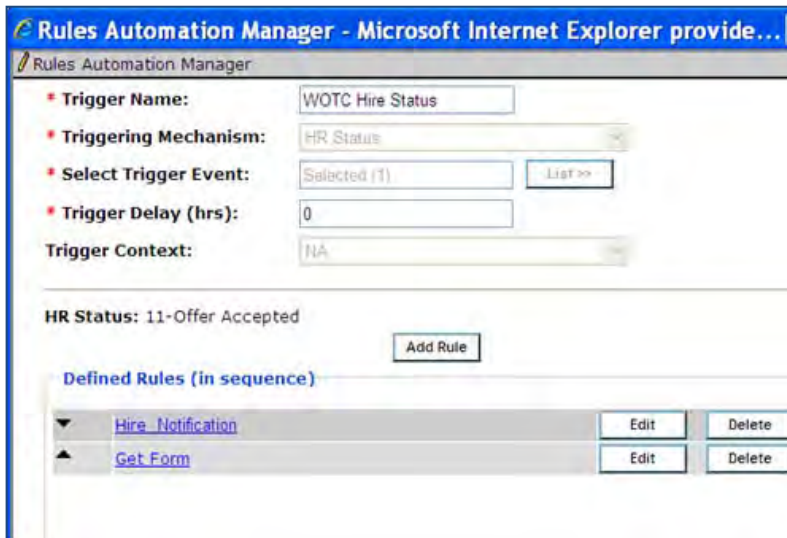
- Rule name – if multiple Req templates are impacted, it may help to include the template name
- Conditions – Check Req template with WOTC enabled
– WOTC form field "LAST_EDITED_BY" = "Submission, System"
- Action Types: – "Populated Field Values" update WOTC form field
– "LAST_EDITED_BY" to Manager Automation
– "Send Data to External System" (engineering will add this)



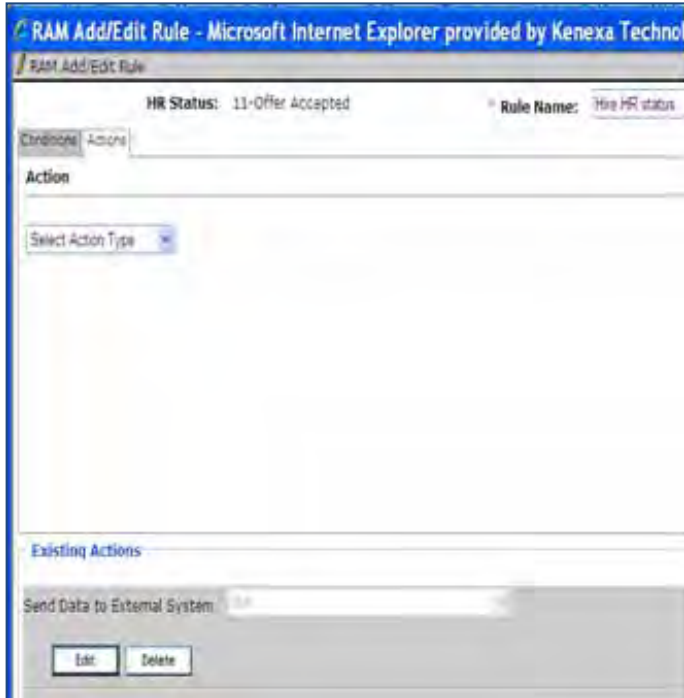
Hired Status

A RAM trigger must be created to notify E&Y of the applicant's hire status and to receive back the required tax forms.

1. Create a RAM trigger with a Triggering Mechanism = "HR Status". The trigger should be based on the client's Hired status.



2. Within the trigger, create 2 rules, for each Req template containing the WOTC field.
 - Rule name – "HIRE NOTIFICATION" (or similar) if multiple Req templates are impacted, it may help to include the template name in each rule
 - Conditions – Check for Req template with WOTC enabled
 - Action Types: – "Send Data to External System" (engineering will add this)



3. Create rule 2:

- Rule name – “Get Form” (or similar) if multiple Req templates are impacted, it may help to include the template name in each rule
- Conditions – Check for Req template with WOTC enabled (if multiple templates are used for WOTC) check that “Tax Credit Eligible = Yes”
- Action Types: – “Send Data to External System” (engineering will add this)

4. Create a maintenance ticket requesting assistance with the RAM WOTC trigger set up. (This is the second maintenance ticket required.)

- Client Name
- Staging/Production
- Name of Trigger created for WOTC
- Manifest name, Import Code, Source code (used with attaching .pdf to attachments tab)
Form fields where Start Date is stored (this is required and must be captured on a candidate form). The form should be completed before the HR status is updated to the hired status, otherwise, a delay should be built into the trigger.

Integrations – WOTC First Advantage

Kenexa has partnered with First Advantage (FADV) to offer Work Opportunity Tax Credits (WOTC) services via a Web service integration with 2x BrassRing.

Product Release: 13.1 LDP105	↳ 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

This standard integration service of Kenexa 2x BrassRing and FADV offers clients Work Opportunity Tax Credits (WOTC) services. WOTC is a US federal tax hiring incentive (applicable to US only), heavily used in the high-volume hourly hiring process. The credits can be significant per hire, which represents great cost savings to companies.

The integration provides your organization with the means to obtain and submit required paperwork within federal time constraints and ensures candidates are asked the qualifying questions in order to receive the tax credits. When configured, WOTC questions can be displayed during the job application process from the Talent Gateway (TG) site or recruiters can send email communications using WOTC merge tokens inviting candidates to complete a WOTC eligibility screening as part of their continuing or new job application.

When a candidate completes the WOTC questionnaire, the WOTC eligibility results form that indicates eligibility status is accessible on the candidate's Talent Record. When a candidate is hired, clients can access the required WOTC tax forms, print them out for the candidate's signature, and forward the signed hard copy forms to FADV for tax credit processing.



Note: Recent regulation changes now allow the WOTC 8850 form to accept eSignature. Clients are no longer required to print this form and have the candidate sign it. Any forms associated with additional credits will still be available for printing/sharing from 2X BrassRing.

WOTC Integration is available on Full Talent Gateways and Gateway Questionnaires.

Candidates

Candidates will automatically be presented with the tax credits questionnaire when the following is true:

- Talent Gateway has WOTC enabled
- Requisition has WOTC set to “Yes”
- If using a Gateway Questionnaire, the WOTC widget must also be present

For Talent Gateways, WOTC question screens display after the Attachments page and before the Additional Questions page. For Gateway Questionnaires, WOTC question screens display wherever the widget has been placed, although the widget must be placed after profile data, including after where the address is collected because this information is required for WOTC.



Note: Profile and address fields are required.

A cookie crumb “Tax Credits” progress bar displays whenever WOTC tax credit questionnaires are used.

Candidate Experience

This section describes the candidate experience when a candidate has applied to a position that requires a WOTC eligibility check. This screen has configuration options using text customization.

In 2xB:

1. Candidate applies for a position and lands on the WOTC Tax Credit Questionnaire:
The SSN page displays:



The screenshot shows a web browser window titled "Tax Credits". The page has a navigation bar at the top with tabs for "Home", "Search", "Search", "Search", "Search", "Search", "Tax Credits", "Additional Information", and "Confirmation". The main content area is titled "Tax Credits" and contains the text "Please complete the following tax credits questionnaire:". Below this, there are two lines of text: "Please enter your Social Security Number in xxx-xx-xxxx format:" followed by a masked input field, and "Please re-enter your Social Security Number in xxx-xx-xxxx format:" followed by another masked input field. A note below the second field states "If younger than 40, you must enter your date of birth:". There is a checkbox labeled "I do not opt to purchase" and two buttons at the bottom: "Continue" and "Close".

2. Candidate enters the requested information and clicks **Continue**.
3. Candidate is prompted to verify their address, even if candidate opted out.



The screenshot shows the same "Tax Credits" web browser window. The main content area now displays "Please review your address for accuracy and make corrections as necessary:". Below this, there are four input fields: "Address", "City", "State in us format", and "Zip Code". At the bottom, there are two buttons: "Continue" and "Back". A link "Exit Tax Credits System" is visible on the right side of the page.

4. Candidate clicks **Continue** or **Exit Tax Credits System**. If candidate has chosen to participate, a series of WOTC questions begin. There may be several question screens. If candidate opts out, they are returned to

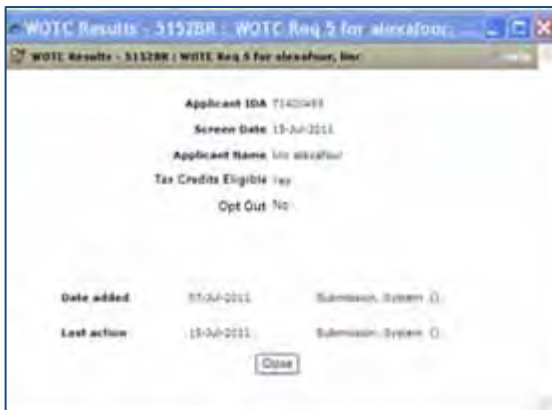
the job application process.

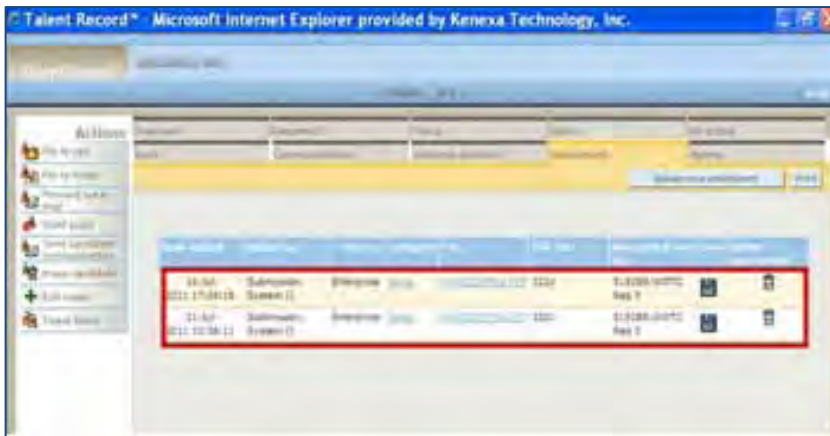


- Candidate completes questionnaire and is returned to either the job application process or the confirmation screen.



The WOTC results form that indicates a candidate's eligibility is attached to the candidate's Talent Record on the attachments tab, even if the candidate chose not to participate.





For candidates who need to complete the WOTC questionnaire post-apply, 2xB users can send an email communication containing WOTC merge tokens (eLinks) to the required TG-hosted WOTC questionnaire. The look and feel of the WOTC questionnaire will match the job application process.

If a candidate is hired, a Rules Automation Trigger (RAM) notifies FADV. FADV then sends the required WOTC tax forms to the Attachment tab of the candidate's Talent Record. Clients can access and print the hard-copy WOTC documents, obtain the candidate's signatures, and submit the signed forms to FADV for tax credit processing.



Note: Recent regulation changes now allow the WOTC 8850 form to accept eSignature. Clients are no longer required to print this form and have the candidate sign it. Any forms associated with additional credits will still be available for printing/sharing from 2X BrassRing.

Notes

- When the candidate is going through a multiple job apply process where more than one job requires the WOTC questionnaire, the candidate will only go through one WOTC questionnaire. The same results will be copied to each of the requisitions applied to.
- If your organization has Save Draft enabled, the button will be hidden on the Tax Credits screen.
- If, due to configuration, the WOTC page is also the Submit page, the Submit button will be disabled until the WOTC questionnaire is complete to ensure the candidate does not inadvertently submit their application before completing the questionnaire.
- If the candidate has completed the WOTC questionnaire within the past 60 days, they will not be required to complete it again. Results already on file will be retrieved.

Candidates will automatically be presented with the tax credits questionnaire when the following is true:

- Talent Gateway has WOTC enabled
- Requisition has WOTC set to "Yes" and WOTC has a valid location selected

2xB User Experience

2xB users add the WOTC eligibility check to their requisitions by setting the WOTC custom field on the requisition to "Yes." Enabling this field launches the WOTC questionnaire when candidates apply. The location field is required.

Once a candidate applies, the configured WOTC candidate results form is attached to the Talent Record for any candidate who was presented with the tax credits screen. The WOTC form indicates whether the candidate is eligible or if they opted out of participating. You access the WOTC form on Attachment tab of the Talent Record.

Best Practice Recommendations

When enabling the WOTC functionality on a requisition, it is recommended that two custom req fields, WOTC Eligibility Check and Location, be set as required. Both custom req fields **must** be Verity enabled. Best Practice is to make the Location field single-select.

During TG text customization, select the Display Exit Link checkbox to enable the Exit Link. In the WOTC questionnaire workflow, clicking this link returns the candidate to the TG/GQ.

Limitations and Known Issues

WOTC Tax Credit feature:

- cannot be used with jobless apply
- is only available on Full Talent Gateways
- is only available on US based English Gateways

When enabling the “Default site for WOTC access for non-logged in with profile with matching locale setting,” only one TG per language can have this feature enabled

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. Clients must have a direct relationship with FADV to use the WOTC service.

Workbench Self-Service Certified Users

Once configured during the setup process, the **WOTC Eligibility Check** custom req field must be added to req templates so it can be selected when appropriate reqs are created. Additionally, your client-specific custom requisition field that indicates the job’s location in WOTC’s required format must also be added to the req template.

1. **Tools > Forms > Reqs > Req forms > Administer req fields [for selected template] > Select custom req fields**
2. Select the **WOTC Eligibility Check** and custom WOTC Location fields.
3. Click **Save**.

2x BrassRing Admin/Admin+ Users

When the WOTC integration is set to Yes, 2xB Administrators can create email templates using WOTC merge tokens. The merge tokens represent two types of eLinks: a “Click here” hyperlink (#WOTC_URL#) or a full URL (#WOTC_RAWURL) that can be pasted into the candidate’s browser. Using both WOTC merge tokens in candidate communications ensures a candidate can access and complete the WOTC questionnaire.

2x BrassRing Users

When 2xB administrators configure email templates using the WOTC merge tokens, 2xB users can now use those email templates and WOTC merge tokens to send email communications to candidates to facilitate the WOTC application process.

Kenexa Tasks

Configuration includes:

- [New client setting](#)
- [Talent Gateway Text Customization](#)
- [Two new custom Req fields](#)
- [One TG Admin setting](#)
- [One new GQ widget](#)
- [Candidate Forms](#)
- [Candidate Form Fields](#)
- [Candidate Import Subscription](#)
- [Code Types](#)
- [Candidate import subscription](#)
- [Maintenance Ticket](#)
- [Two RAM Triggers](#)



Note: Use Ctrl+Click to jump to each section. Use ALT+LEFT ARROW to return to your point of origin.

Workbench

Client Setting

New WB client setting **Work Opportunity Tax Credit Integration**

1. **WB > Admin > Manage Clients > Edit client settings.**

When the client setting is set to **Yes**, it cannot be disabled if there are:

- Any Talent Gateways with the “WOTC Integration” Admin setting enabled; or
- Any db fields are mapped for use with the WOTC integration.

VersionTGbasic 2.0

Years exp\ Grad year config Display both min and max search field

Work Opportunity Tax Credit Integration No Yes

Restricted Settings: These Settings are not available for general use

Talent Gateway Text Customization

Talent Gateway text customization allows you to customize displayed when a candidate begins the WOTC process.


1. **WB > Admin > Talent Gateway > Text customization.**

2. Scroll to the WOTC tab.

3. Complete the Page Title and Instruction Text fields.
4. Select the radio button for Enable Opt Out.
5. (Not Applicable) The Display Exit Link option is not applicable. Do Not Select.
6. Check the Default site checkbox. Checking this box ensures the WOTC questionnaire is available to candidates who do not apply through a Talent Gateway but need to complete the WOTC questionnaire at a later date. Restriction: Only one TG per language can have this enabled.

Custom Req Field

When the client setting “WOTC Integration” is first set to “Yes” a new custom Req field, “WOTC Eligibility Check” displays.



Note: This req field is **Required** and **must** be attached to the req and **must** be Verity enabled.

An additional client-specific custom requisition field needs to be used to indicate the job's location in WOTC's required format. This must also be Verity enabled. **Best practice is to make this a single-select.** The ID is sent to FADV, so should match the list they are expecting for the client.

1. **Tools > Forms > Reqs > Req Forms > Define Custom Req Fields.**
2. Select **Save and Continue** on the Define new custom req field dialog box in order to edit the req field attributes of the WOTC Eligibility Check field.

Define new custom req field - Microsoft Internet Explorer

Define new custom req field

Placement: 63

*Database field name: WOTC

Field name: WOTC Eligibility Check [English (US)]

*Type: Radio Button

Custom report field: Yes No

Posting interface mapping: None

Instruction type: None

Font size: Medium

Encrypted: Yes No

HR status restrictions: Yes No

Buttons: Save and continue>>, Clear, Cancel

3. Select the **Yes** radio button for Searchable and Outputable.
4. Complete the remaining fields as necessary.

Define field attributes - Windows Internet Explorer

Define field attributes

Field name: WOTC

Field length: 255

Search / Output

Searchable? Yes No

Outputable? Yes No

Used (TEXT)	Available (TEXT)	Enable Search & Output
1	149	<input type="checkbox"/>

Options source

Maintain Custom List

Pull options from existing list [Select list](#)

Field associations

Enable association Parent Child

[Show children](#) [Show parent](#)

Display full list with default selection

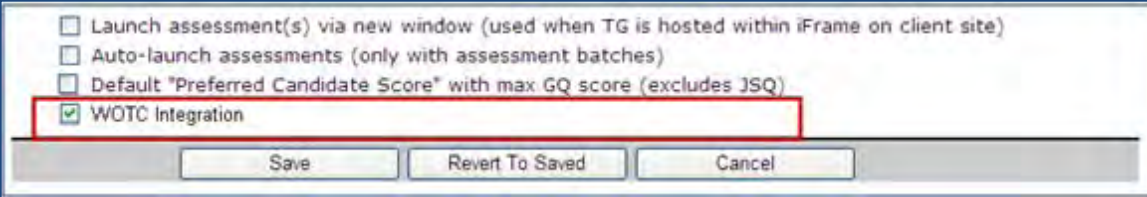
Buttons: Save, Revert to saved, Cancel

5. Click **Save**. The WOTC Eligibility Check req field is now mapped to Verity.

Talent Gateway Admin Setting

The new **WOTC Integration** setting (Special Configuration option) controls whether the TG presents the WOTC questionnaire when reqs with WOTC set to “Yes” are posted to it. The setting must be checked.

1. **Tools > Talent Gateways > Admin.**
2. Select the checkbox for WOTC Integration.



3. Click **Save**.
4. When the WOTC option enabled, and the req “WOTC” field is set to “Yes,” and the location field populated, the candidate will be presented with the WOTC questionnaire. In a non-GQ flow, the questionnaire launches after the Attachments page in the TG, prior to the Additional Questions page. The questionnaire matches the look and feel of the TG.



Note: If the Tax Credits questions are the last step before Submit, the page button states **Continue** rather than **Submit**.

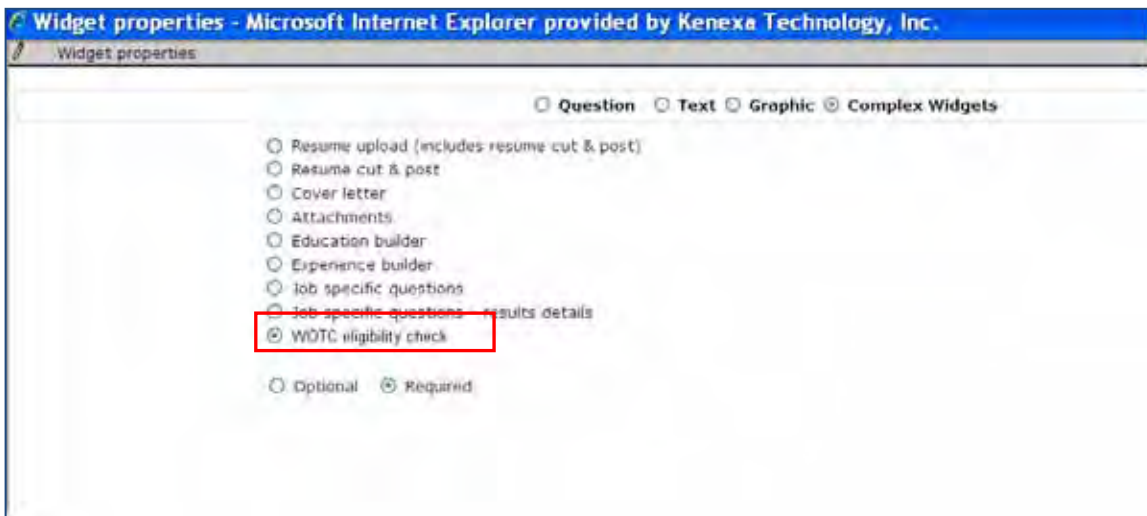
Business Rules

- The option is disabled if the client setting “WOTC Integration” is set to “No.”

Gateway Questionnaire Widget

A new complex widget, **WOTC eligibility check**, indicates where in the application process the candidate will be presented with the WOTC questionnaire.

1. **Tools > Gateway Questionnaires > Administer Widgets.**
2. Select the radio button for WOTC eligibility check.
3. Select the radio button Required.



4. Ensure that your configuration adheres to the following business rules:

Business Rules

- The widget must be on its own page, there cannot be any other widgets on a shared page.

- When the widget is selected, the “Required” attribute will automatically be selected.
- The widget requires the following profile fields precede it: firstname, lastname, address, city, state, zip (this information is needed to initiate the WOTC questionnaire, recommendation is to make the fields required).
- The widget will be respected when the TG Admin setting “WOTC integration” is enabled AND the custom Req field “WOTC” is set to “Yes.” In this case, the candidate will be moved into the WOTC eligibility check when arriving on the GQ page with the GQ widget. It is also a best practice to have the WOTC location field populated.

Candidate Forms

A new candidate form, WOTC Results, is created to store a candidate’s WOTC eligibility results. Form privileges need to be configured for each client.

1. Tools > Forms > Candidate Forms.

All fields can be manually updated unless otherwise noted.

- Database Title = WOTC. This is not editable
- Title = WOTC Results.
- Disclaimer = blank
- Search = No selection
- Output = No selection
- Email = blank
- Approval process = No. This is not editable.
- Form Multiples = Single Per Candidate/Req Combination. This is not editable.
- Send existing form in edit mode = No. This is not editable.

Add new form - Microsoft Internet Explorer provided by Kenexa Technology, Inc.

Add new form

Gateway candidate integration form? Yes No

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

Erase with candidates Yes No

Form field alignment Default Left

Enable language toggle

Event Manager Event Form? Yes No

Add / View / Modify My

View all

Modify - my reqs

Modify all

- Gateway candidate integration form? = No. This is not editable.
- Create form from TG = IGNORE all... This is not editable.
- Erase with candidates = Set with standard default
- Enable language toggle = Set with standard default
- Event Manager Event Form = No. This is not editable.
- Add/View/Modify My = No selection.
- View All = No selection
- Modify – my reqs = No selection. This is not editable.
- Modify all = No selection. This is not editable.

All the fields on the special “WOTC” form must have these business rules applied at all times, irrespective of the client setting. Only at form level inactivation/deletion must the client setting must be considered.

Candidate Form Fields

The following fields are added to the form. The following fields are **NOT** applicable for the FADV Integration and should be hidden for all users:

- WOTC_FED_CR
- WOTC_ST_CR
- WOTCResults1
- LAST_EDITED_BY (not shown)

Other fields’ privileges should be configured as desired by client.

Administer form fields: [WOTC]

View: [[Active fields](#) | [Inactive fields](#)]

Showing 6 fields

Select	Order	Database field name	Display name	Primary field	Field type	Searchable	Outputable	Verify enabled	Encrypt	Sort type	Custom report field	Edit field attributes	Administer field options
<input type="checkbox"/>	1	WOTC_APPID	Applicant ID		text	No	No	No	No	N/A	No		
<input type="checkbox"/>	2	WOTC_SCRNDATE	Screen Date		date	No	No	No	No	N/A	No		
<input type="checkbox"/>	3	APP_NAME	Applicant Name		text	No	No	No	No	N/A	No		
<input type="checkbox"/>	4	WOTC_FED_CR	Federal Credits		text	No	No	No	No	N/A	No		
<input type="checkbox"/>	5	WOTC_ST_CREDIT	State Credits		text	No	No	No	No	N/A	No		
<input type="checkbox"/>	6	WOTC_OPTOUT	Opt Out		text	No	No	No	No	N/A	No		

Business Rules

DB field name	Display name	Field type	Length or Date	Searchable	Outputable	Verify enabled	Encrypt	Sort type
Not editable	Editable	Not editable	Not editable	=No (all fields)	=No (all fields)	=No (all fields)	=No (all fields) & Not editable	=N/A (all fields)

None of the fields can be inactivated/deleted if the client setting “Work Opportunity Tax Credit Integration” is set to Yes. All fields will be hidden for all languages by default (this can be modified by privileged WB users).

Values

Order	Database field name	Display name	Field type	Length or Date	Notes
1	WOTC_APPID	Applicant ID	Text	255	This will be populated with the ApplicantID returned by partner (First Advantage)
2	WOTC_SCRNDATE	Screen Date	Date	25 years up/ 25 years down	This will be populated with the date the candidate completed the questionnaire, the current date on the date the form is created
3	APP_NAME	Applicant Name	Text	255	The candidate’s name in Lastname, Firstname MI format

Candidate Import Subscription

Create a new candidate import subscription for WOTC.

1. **Tools > Integration > Admin.**

2. Add Integration Type = “Candidate Import” if not already created
3. Under Subscription admin add new: create Subscription and Manifest names, Stacking Logic is required, other items are optional (names must be **ALL CAPS**)
4. Select “DefaultVendor” for subscriber
5. Click **Save**.

Code Types

Tools > Settings > Code Types

Create a new WOTC code for both Import and Source code types. If these code types do not exist, you must create the Import and Source types first.

Maintenance Ticket

Two maintenance tickets must be created for this integration. Create the second maintenance ticket after configuring the two RAM triggers, as a completion step for the second RAM trigger.

To create the maintenance ticket:

1. Create a project ticket.
2. Create a Work ticket from the project ticket and assign it to: Queue – Engineering, Type – Maintenance.

3. Ensure the ticket contains the following:

- Client Name
- Staging or Production
- WOTC Vendor Name (FADV)
- WOTC Company ID (must get this from FADV)
- Name of Requisition field(s) that will be used for WOTC Location (must get this list and format from client or FADV)
- Username/Password for client to access vendor's system (must get this from FADV)

Two RAM Triggers

Two RAM triggers must be created, one to obtain eligibility results and one to obtain a client's Hired status.

Eligibility Results:

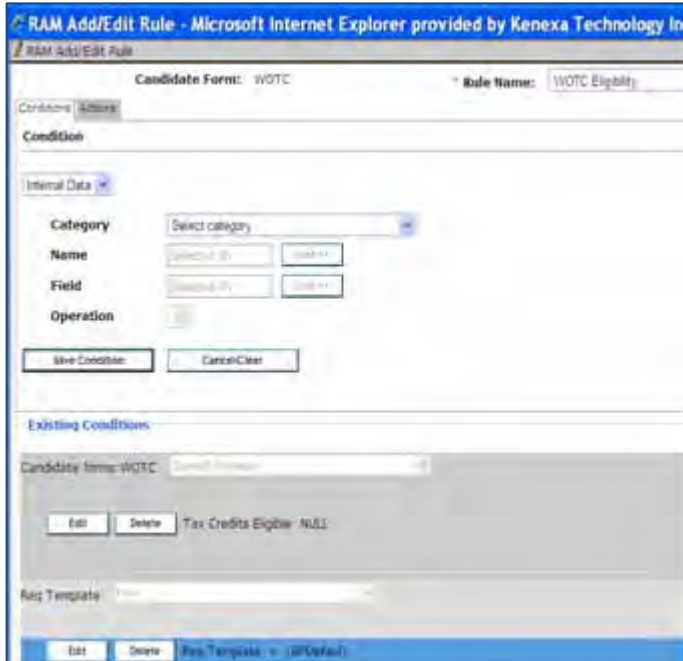
A RAM trigger must be created to get the candidate's WOTC eligibility results. This occurs within a few minutes of a candidate's submittal.

1. Create a RAM trigger with a Triggering Mechanism = "Form Insert or Update". The trigger should be based on the "WOTC Results" form and named to reflect its use, WOTC Eligibility Check.

The screenshot shows the 'Rules Automation Manager' interface. The 'Trigger Name' is 'WOTC Eligibility'. The 'Triggering Mechanism' is 'Candidate Form Insert or Update'. The 'Select Trigger Event' is 'Selected (1)'. The 'Trigger Delay (hrs)' is '0'. The 'Trigger Context' is 'None'. The 'Candidate Form' is 'WOTC'. There is an 'Add Rule' button. Below, the 'Defined Rules (in sequence)' list includes 'Eligibility Check' and 'Req Template 2', each with 'Edit' and 'Delete' buttons.

2. Within the trigger, create 1 rule for each Req template containing the WOTC field:

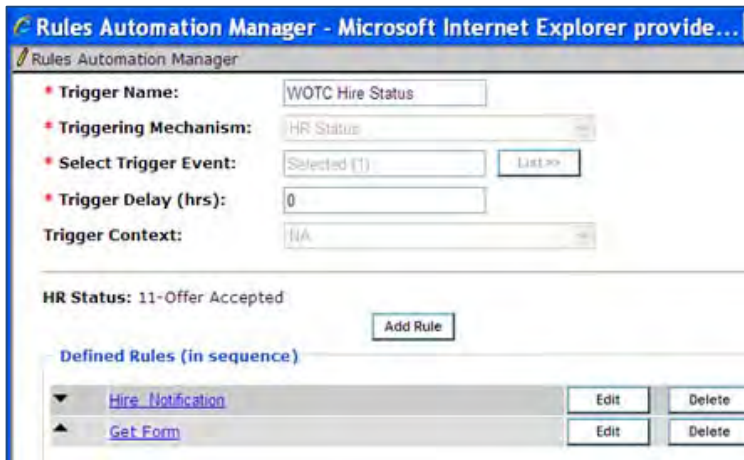
- Rule name – if multiple Req templates are impacted, it may help to include the template name
- Conditions – Check Req template with WOTC enabled
– WOTC form field "LAST_EDITED_BY" = "Submission, System"
- Action Types: – "Populated Field Values" update WOTC form field
– "LAST_EDITED_BY" to Manager Automation
– "Send Data to External System" (engineering will add this)



Hired Status

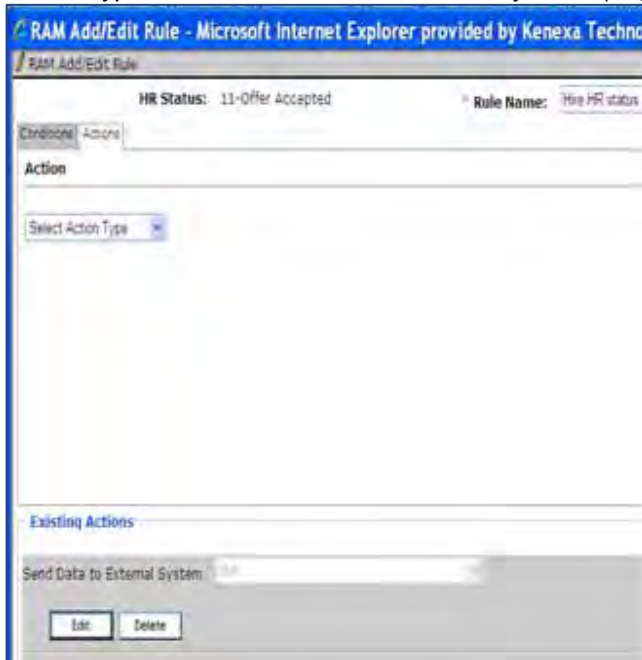
A RAM trigger must be created to notify FADV of the applicant’s hire status and to receive back the required tax forms.

1. Create a RAM trigger with a Triggering Mechanism = “HR Status”. The trigger should be based on the client’s Hired status.



2. Within the trigger, create 2 rules, for each Req template containing the WOTC field.
 - Rule name – “HIRE NOTIFICATION” (or similar) if multiple Req templates are impacted, it may help to include the template name in each rule
 - Conditions – Check for Req template with WOTC enabled

- Action Types: – “Send Data to External System” (engineering will add this).



3. Create rule 2:
 - Rule name – “Get Form” (or similar) if multiple Req templates are impacted, it may help to include the template name in each rule
 - Conditions – Check for Req template with WOTC enabled (if multiple templates are used for WOTC) check that “Tax Credit Eligible = Yes”
 - Action Types: – “Send Data to External System” (engineering will add this)
4. Create a maintenance ticket requesting assistance with the RAM WOTC trigger set up. (This is the second maintenance ticket required.)
 - Client Name
 - Staging/Production
 - Name of Trigger created for WOTC
 - Manifest name, Import Code, Source code (used with attaching .pdf to attachments tab)
Form fields where Start Date is stored (this is required and must be captured on a candidate form). The form should be completed before the HR status is updated to the hired status, otherwise, a delay should be built into the trigger.

Internal – 2x Onboard-2x BrassRing Configuration Enhancements

This internal project provides an easier process for Kenexa staff configuring the integration between 2x Onboard and 2x BrassRing.

For complete configuration information, Kenexa staff should see the **Kenexa 2x BrassRing® to 2x Onboard™ Integration Configuration Guide** in the Kenexanet Product Documentation Library (2x Onboard tab).

Product RDP351 Release 13.1	↳ 2x BrassRing	↳ Integrations – 2x Onboard™
Visible Changes	↳ Not applicable – Internal project	
How do I get this feature?	↳ 2x Onboard is a separate product and requires configuration – contact your Kenexa Support Team for implementation price and details.	

Feature Description

Several improvements were made to the configuration of the 2xB-2xO integration. They include:

- Credential information such as Account Name, service User Name, service Password & Service URL can now be input in Workbench.
- A new “Map All” button is shown at the top of each mapping section. Clicking on this button automatically maps all fields to the standard user area section and adds a Candidate Info Label.
- The XPath can be verified and obtained within Workbench.

No changes were made to the recruiter or candidate experience.

How Do Clients Get this Feature?

2x Onboard is a separate product and requires configuration – contact your Kenexa Support Team for implementation price and details.

Kenexa Tasks

The following highlights the Workbench changes (see the **Kenexa 2x BrassRing® to 2x Onboard™ Integration Configuration Guide** for complete information).

Workbench

Tools > Integrations > Manage hosts > Add/Edit host

- Manage hosts area supports the ability to include the 2xO client Account Name, web service User Name for the 2xO client, web service Password for the 2xO client, and Service URL used within the subscription when selecting the host.
- Select “2xO” in Type drop down.
- Existing 2xO integrations are automatically migrated, so that the host will already be created for existing 2xO clients.

The screenshot shows a web browser window titled "Add host" with the following fields and options:

- *Host name: [Text input]
- *Contact name: [Text input]
- Phone: [Text input]
- *Email: [Text input]
- Troubleshoot routing email: [Text input]
- Host description: [Text area]
- Hide contact information upon errors
- Hide system-generated error message from users
- Custom error text [Text area] [English - United States]
- Default posting URL: [Text input]
- Account Name: [Text input] (highlighted in red)
- User Name: [Text input] (highlighted in red)
- Password: [Text input] (highlighted in red)
- Information link URL: (export only) [Text input]
- Service URL: [Text input]
- Target URL: [Text input]
- Type: 2xO [Dropdown menu]

Buttons at the bottom: Save, Clear, Cancel.

The host created previously is now selected within the subscription.

Tools > Integrations > Administration > Candidate export subscription admin > Add/Edit subscription > Mappings

A **Map All** button appears at the top of each section, removing the need to click **Map** for each field.

- Use Map All only for custom req and candidate form fields:
 Custom req fields are mapped to req user area section
 Custom candidate form fields are mapped to candidate user area section
- Candidate info label automatically populates using the database field name.

Tools > Integrations > Administration > Candidate export subscription admin > Preview XML/XML Path

- XPath can be viewed for all mapped fields and used for verification when filling out the mapping doc.
- Bottom section is formatted as follows:
 - DB Field Name:
 - Candidate Info Label:
 - CND#:
 - XPath



New UI – Automatic Panel Mapping

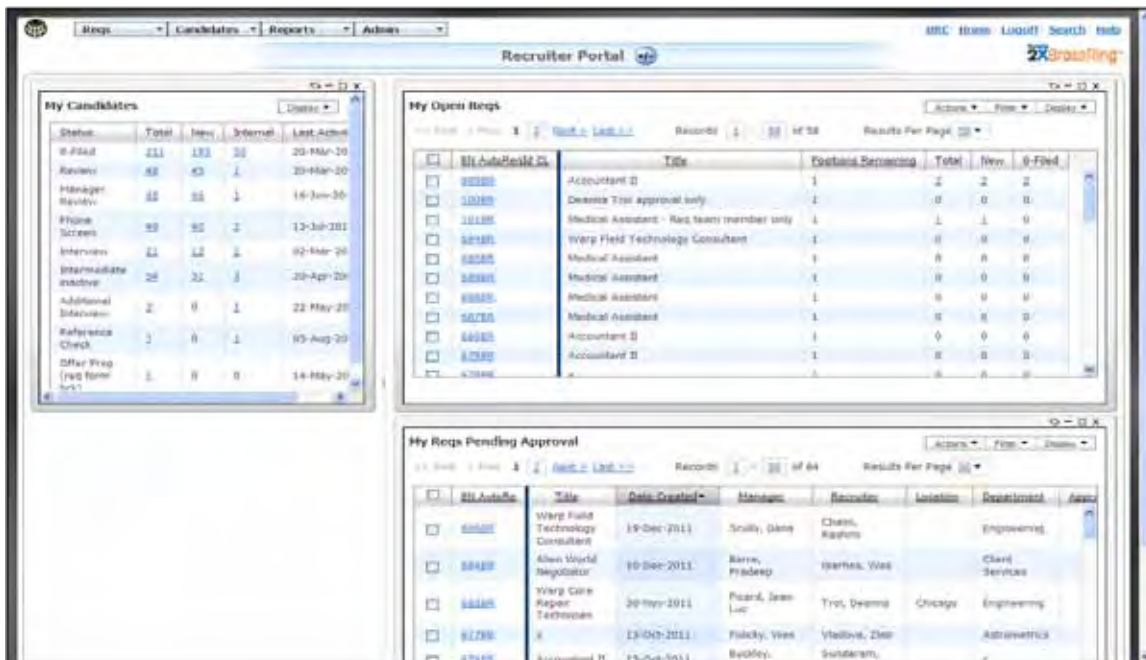
The New UI was enabled for all users just prior to Release 13.1. For clients' convenience, any user types that were not updated prior to this have default panel mappings for the New UI automatically applied. Clients can also set up different panel mappings for their own user types according to their business needs.

Product	⌘ New UI
RDP634 Release 13.1	
Visible Changes	⌘ Yes – details in <i>Visible Changes</i> document sent for each release build.
How do I get this feature?	⌘ Automatic – see details below.

Feature Description

The New UI was enabled for all users just prior to Release 13.1. For clients' convenience, any user types that were not updated prior to this have default panel mappings for the New UI automatically applied. Clients can also set up different panel mappings for their own user types according to their business needs.

The following is an example of the Welcome Page with default panel mapping (for user types that do not have active panels mapped). This mapping is for a user with all of the associated privileges for the panels with “Default” layout setting as defined in the Default Panel Mapping rules described in the next section.



If the user doesn't have the associated privileges, then only the “Welcome message” panel is visible.

Workbench Self-Service

In Workbench Self-Service (**Tools > Users > User types > [Select a user type] > User type Panel Mapping**), the option to “Activate new UI for this user type” checkbox was removed since it is no longer needed. Automatic panel mapping in Workbench will follow these business rules:

- If user type has active panel mapping, then there are no updates to panel mapping (“Activate...” checkbox removed).
- If user type has inactive panel mapping with no previously selected panels, “Default panel mapping rules” defined in the next section, will be applied.

- If user type has inactive panel mapping with at least one panel selected, the currently configured panel mapping will be activated.
- Default panel mapping rules defined in the next section are not applicable to the QuickStart user types. If any user does a “Save as new” for the QuickStart user type, only the default Welcome message mapping will be applied.

Default Panel Mapping Rules

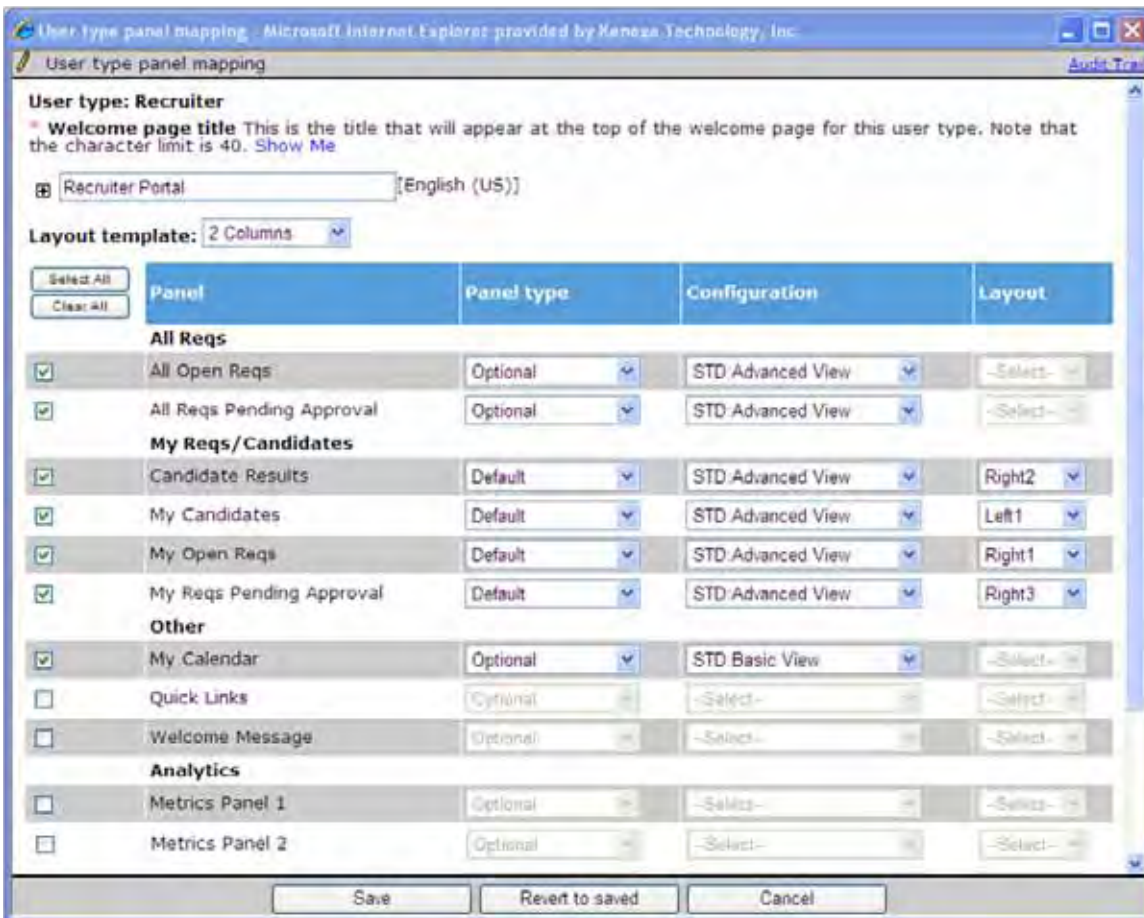
For user types meeting the conditions in the previous section, these rules will be applied. If user type has the associated privilege for a panel, then that panel will be mapped based on the following configuration table. The Layout will be two columns:

Panel	Associated Privilege	Panel Type/Configuration/Layout if Associated Privilege is Present
All Open Reqs	Reqs – All reqs – View open	This panel is selected with the following configuration: Panel Type = Optional Configuration = STD: Advanced View Layout = N/A
	If the user has only this privilege (to view all) but not “My reqs – View open”then panel type and layout will be the same as what is listed for “My Open Reqs”
All Reqs Pending Approval	Reqs – All reqs – View pending	This panel is selected with the following configuration: Panel Type = Optional Configuration = STD: Advanced View Layout = N/A
	If the user has only this privilege (to view all) but not “My reqs – View pending”...	...then panel type and layout will be the same as what is listed for “My Reqs Pending Approval”
Candidate Results	No current associated privilege, but mapped if <i>one</i> of the following is present: My reqs/All reqs – View open –OR– Candidate categorization – My Candidates menu	This panel is selected with the following configuration: Panel Type = Default Configuration = STD: Advanced View Layout = Right 2
My Candidates	Candidate categorization – My Candidates menu	This panel is selected with the following configuration: Panel Type = Default Configuration = STD: Advanced View Layout =Left1 –OR– Right 1 (if privilege for My or All Open Reqs is NOT present)
My Open Reqs	My reqs – View open	This panel is selected with the following configuration: Panel Type = Default Configuration = STD: Advanced View Layout = Right 1

My Reqs Pending Approval	My reqs – View pending	This panel is selected with the following configuration: Panel Type = Default Configuration = STD: Advanced View Layout = Right 3 –OR– Right 1 (if privilege for My or All Open Reqs or My Candidates is NOT present)
My Calendar	None – but only select if ONE or more of the above panels that are of the Panel Type = Default are mapped	This panel is selected with the following configuration (no privilege required for selection): Panel Type = Optional Configuration = STD: Basic View

The following is an example of the automatic panel mapping for a user that has all of the “associated privileges” described in the preceding mapping rules.

Workbench > Tools > Users > User types > Select a user type > Actions > User type Panel Mapping



If *none* of the above associated privileges are present for panels that have associated privileges (i.e., not including My Calendar), then only the following would be mapped:

Welcome Message	Panel Type = Default Configuration = CUS: Default Layout = Left 1
-----------------	---

Panels NOT selected

The following panels are not selected as part of the automatic panel mapping in ANY scenario:

- Other – Quick Links
- Analytics – all panels
- Integration – My Social Source

How Do Clients Get this Feature?

This feature is available automatically without configuration. To add your own panel mappings, please contact your Kenexa Support Team or Certified Workbench User for more information.

Kenexa Tasks

Client Settings

For all the clients, these client settings will automatically be set to “Yes”:-

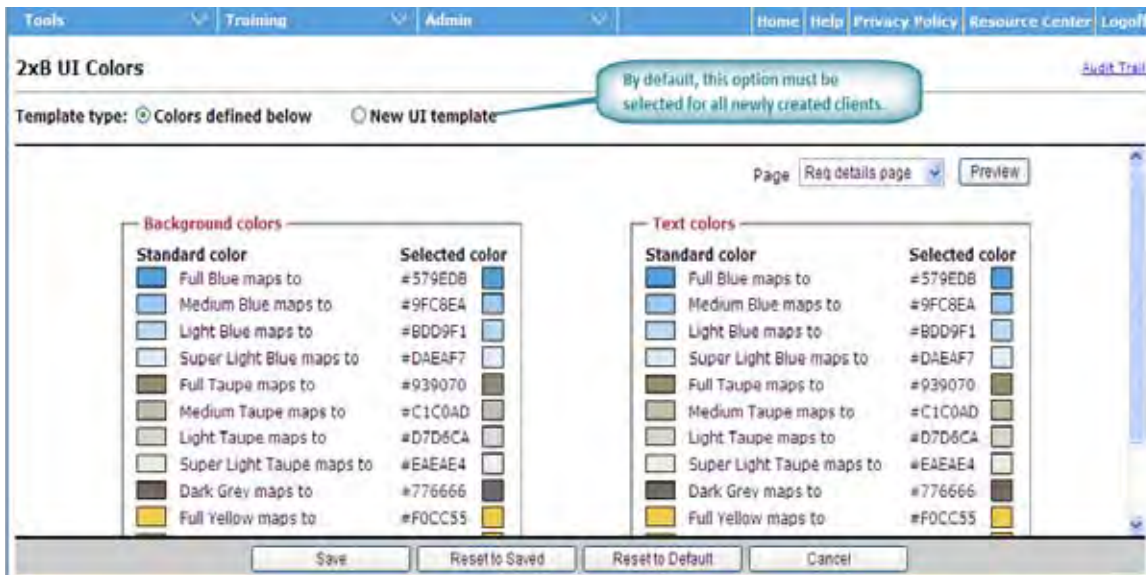
- New UI
- New UI Default panel mapping for new user types

Once enabled by the release scripts, these two settings will be disabled so that they can no longer be turned off.

Update 2xB UI custom colors:

- By default, “New UI template” will be selected for all the newly created clients. This is a best practice recommendation for all existing clients, but this will not be enforced.
- For clients utilizing custom colors, the New UI template is not available (per current functionality).

Workbench > Tools > Settings > 2xB UI Colors



New UI – Candidate Filter and Display Enhancements

This feature provides the ability to display multi-select, checkbox, and grid field types on the Candidate Results panel and Talent Record, as well as providing additional filtering options and functions.

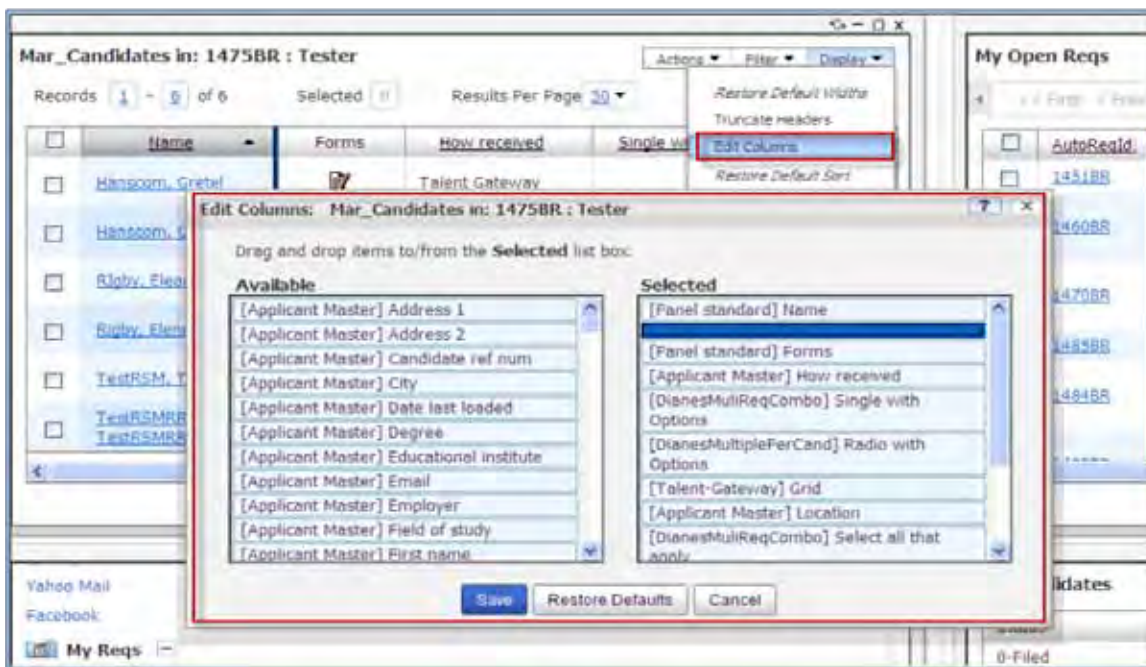
Product	<ul style="list-style-type: none"> 2x BrassRing Workbench Self-Service
LDP102 Rel 13.1	<ul style="list-style-type: none"> New UI
Visible Changes	<ul style="list-style-type: none"> No – requires specific conditions / configuration for visibility.
How do I get this feature?	<ul style="list-style-type: none"> Specific conditions required – see details below.

Feature Description

This feature provides the ability to display multi-select, checkbox, and grid field types on the Candidate Results panel and Talent Record, as well as providing additional filtering options and functions on Candidate panels. Users can more quickly find candidates that meet the qualifications that they are looking for, especially when sifting through a high volume of applicants.

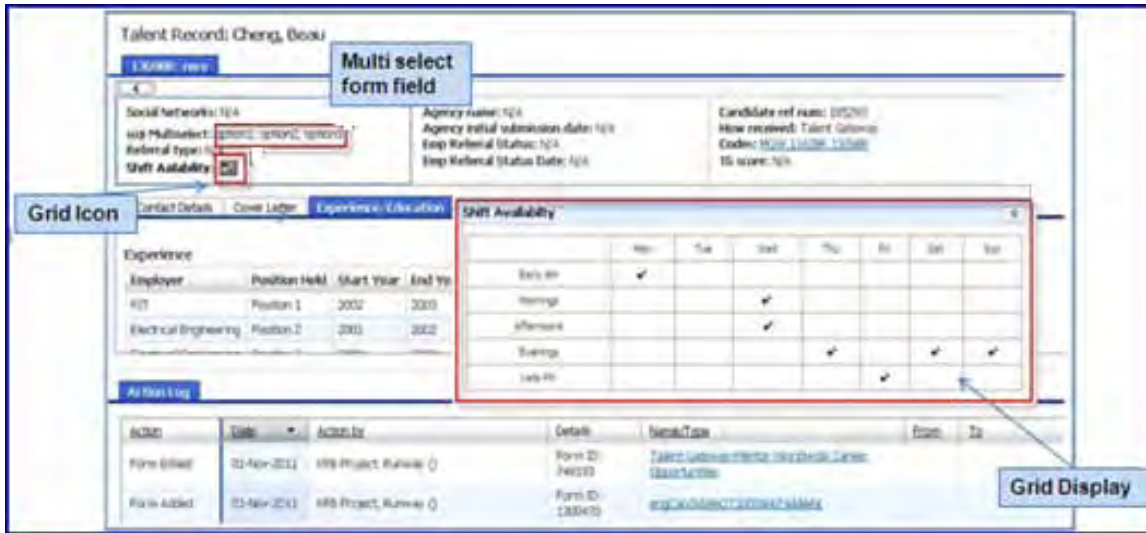
Display Columns

Multi-select, checkbox, and grid field types, when designated as "Outputable" through the form field attributes, can now be displayed as a column in the Candidate Results panel. User types that are allowed to edit panel display options will see these field types included on the Edit Columns widget when they select **Display > Edit Columns**.

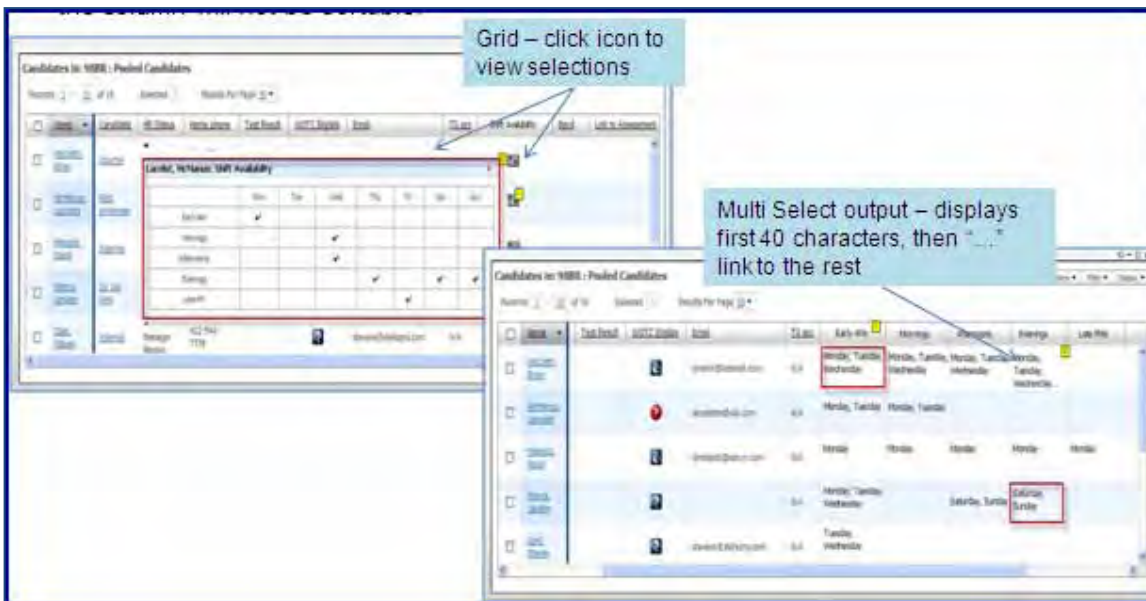


When a multi-select or checkbox field type is configured to appear in the column display, the column is not sortable.

Outputable multi-select, checkbox, and grid field types can also be added to the Talent Record Ribbon (via Screen Display Defaults in Workbench).



- For a grid, click the grid icon (📊) to view the values.
- For a multi-select field, the column displays the first 40 characters, with an ellipsis link you can click to display the remainder.



Filtering

Other enhancements to Candidate Results filters include:

- Additional filters besides the standard “HR Status” and “Candidate Type” can be added to the filter menu.
- Several new filter functions are available: **Save filters**, **Save current filter**, **Manage saved filters**, and **Last executed filter**.

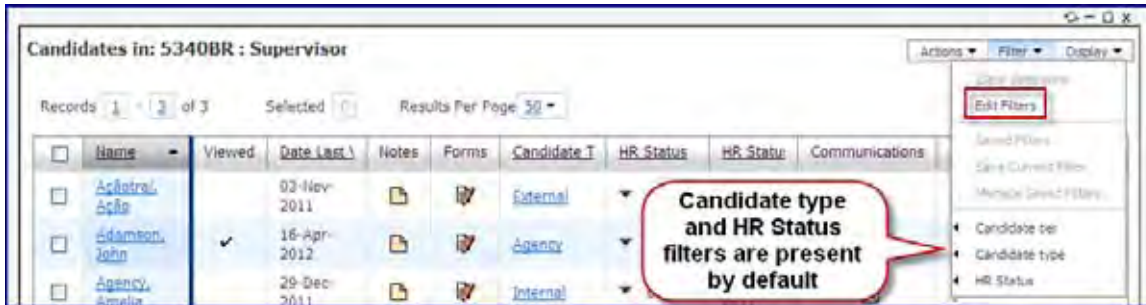
Adding Filters

You can now add searchable fields to the Filter menu of the Candidate Results panel or to a custom Candidate Results subpanel. This is available for results panels launched from any panel *except* My Candidates).

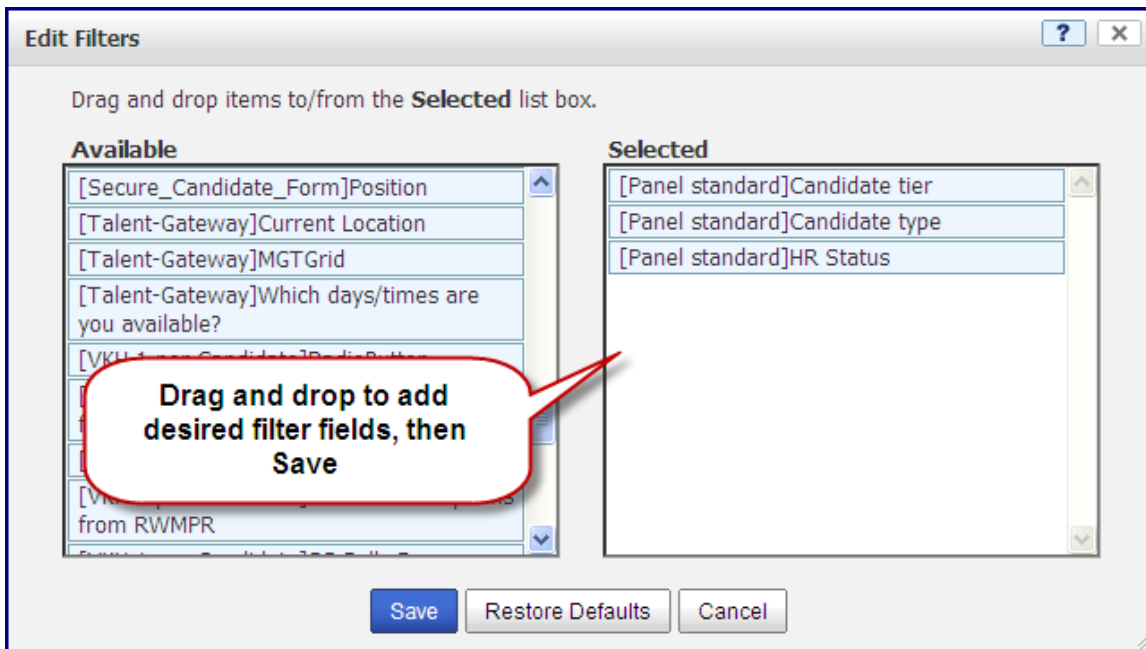
The Edit Filters option appears if the user has access to the Filter menu; no additional privileges are required. Filter categories appear in alphabetical order by field label. If no filters have been added (through Edit Filters or Workbench configuration), only the standard "Candidate type" and "HR Status" filters appear by default.

To add searchable fields to the Filter menu:

1. Click **Edit Filters** on the Filter menu of the Candidate Results panel or to a custom Candidate Results subpanel. This is available for results panels launched from any panel *except* My Candidates).



2. Select and drag the desired filter fields from the Available pane to the Selected pane. Up to 25 fields can be saved for use as filters. Field types available for selection include:
 - Applicant Master (How Received, Location, Country)
 - Panel Standard (HR Status, Candidate Type, Forms, Forms excluded)
 - Code Types (all active code types)
 - Candidate Form Fields (mapped "Searchable" single-select, multi-select, radio button, and checkbox fields where the user type is selected for "Search" at the form attribute level).

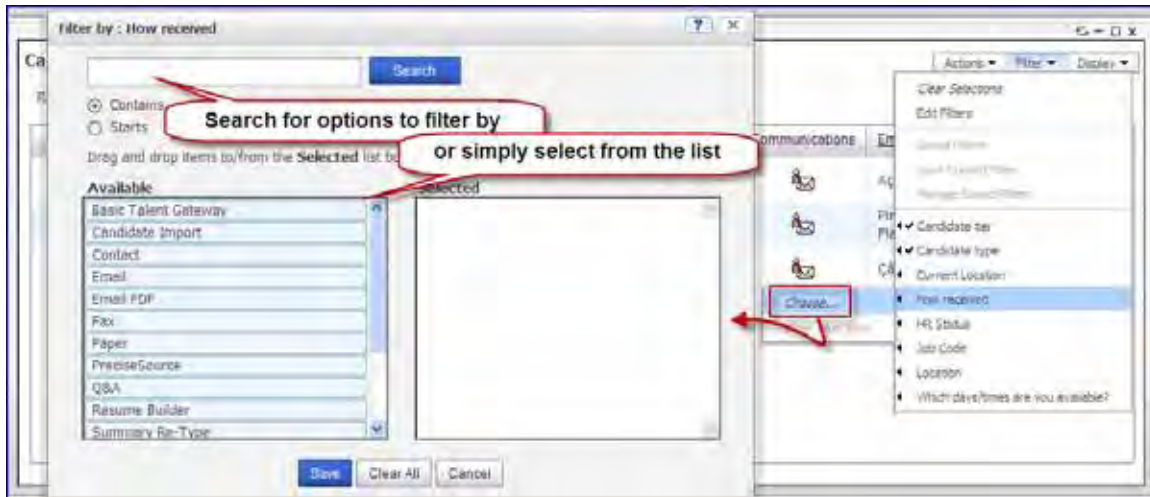


3. Click **Save**.
 –OR–
 To reset the Selected box with the fields that are currently configured in Workbench, click **Restore Defaults**, or to close the window without saving, click **Cancel**.

Executing Filters

To execute a filter:

1. Click the **Filter** menu.
2. Select the filter and its desired filter values.
 - When a filter is selected for the Filter menu but is not part of the Candidate Results display columns, you execute it through a Choose widget (similar to the one used for req panel filters).



Select the values to filter by and drag to the Selected box before saving. You can use the search feature to find the desired values more quickly.

- When a grid field type is configured to appear in the Filter menu, selecting it launches a new Grid selection widget rather than the Choose widget.

Filter by : Which days/times are you available? ✕

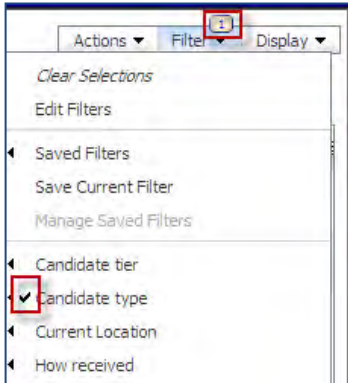
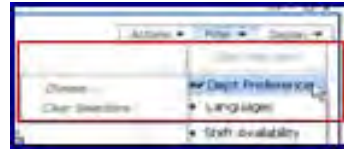
Select All	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
11 PM - 7 AM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7 AM - 3:30 PM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 PM - 11 PM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8 AM - 5 PM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9 AM - 5:30 PM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10 AM - 7 PM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Make your selections. You can:

- Check individual boxes
- Select/clear all by clicking the Select All or Clear All link
- Select/clear all in a row or column by clicking the row or column links.

Click **Save**. This closes the grid and refreshes the panel with the selected checkboxes executed as filter criteria.

For grid field types, the selected values do not display in the sub-menu. To view the selected values, click **Choose** to launch the Grid Choose widget once again with the selected values.

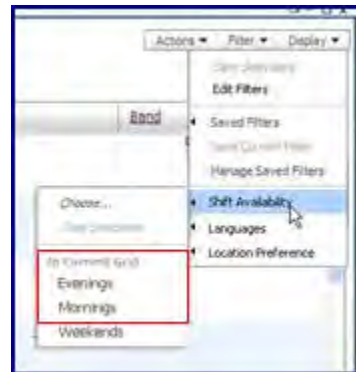


After filters have been applied, the number of “filter categories” in place appears above the filter menu, and check marks appear next to the filter category and filter options in the sub-menu.

In Current Grid is added to the submenu if the filter field is configured to appear as a column in the current panel display (i.e., on the current page that is displaying in the panel) *and* has some values entered.

For multi-select and checkbox fields, only the first option that appears for each candidate displays.

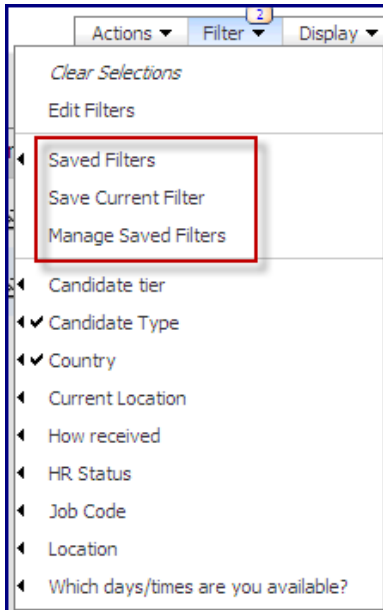
"In Current Grid" does not display for the following fields: HR Status, Candidate Type, Candidate forms fields of the types *other than* single- and multi-select, check box, radio button, Forms, and Forms Excluded.



The filtered list of candidates will apply to the life of the panel, but if you launch a new panel (by selecting a different group of candidates to view from the launching Req panel), all filters are cleared. To apply the same filter again, select the “Last Executed Filter” option (described in the following section).

New Filter Functions

Additional filter functions now include: **Saved Filters**, **Manage Saved Filters**, **Save Current Filter**, and **Last Executed Filter**.

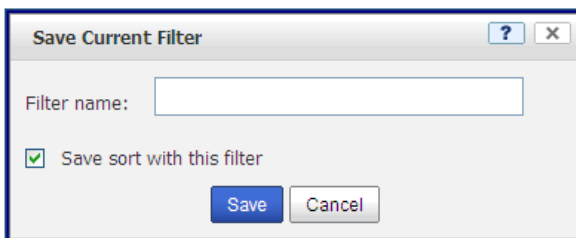


Saved Filters and Manage Saved Filters work similarly to those functions on Req panels.

- To access previously saved filters or the filter most recently executed, click **Saved Filters**. Select **Last Executed** to execute that filter (saved or unsaved filter). “No records found” appears if the filter does not apply to the current Candidate Results view (for example, if HR Status filter is in place, but that HR Status is not included in the CR view).
- To rename or delete existing saved filters, click **Manage Saved Filters**.



Once a filter is in place, select **Save Current Filter** from the Filter menu to open the Save Current Filter widget, which behaves the same as the save option in the Req panels.



- Enter a unique name of up to 255 characters.
- To save the default sort with the filter (if enabled for your configuration), check “Save default sort with this filter.”

Any filters that are executed from the Candidate Results Panel will be logged with the appropriate data for the standard "OFCCP Search Activity" report.

Reports > Standard Reports > System reports > OFCCP search activity > Run>Summary OR Detail

Summary report					
Search ID	User	Search date	Search type	AutoReqId	Search reason
293376	Russ Jenkins (I)	23-Jan-12	Filter folder	1331BR	
293376	Russ Jenkins (I)	23-Jan-12	Filter folder	1331BR	
293377	Russ Jenkins (I)	23-Jan-12	Filter folder	1332BR	
297838	Diane Crusco (I)	24-Jan-12	Filter folder	1362BR	
297899	Diane Crusco (I)	25-Jan-12	Filter folder	1344BR	
297956	Diane Crusco (I)	26-Jan-12	Filter folder	1362BR	

Detail report						
Search ID	User	Search date	Search type	AutoReqId	Search	Search criteria
293376	Russ Jenkins (I)	23-Jan-12	Filter folder	1331BR		Candidate type current type: External Inactive Internal Past employee Agency Language: English (Int)
293376	Russ Jenkins (I)	23-Jan-12	Filter folder	1331BR		Candidate type current type: External Inactive Internal Past employee Agency Language: English (Int)
293377	Russ Jenkins (I)	23-Jan-12	Filter folder	1332BR		Candidate type current type: External Inactive Internal Past employee Agency Language: English (Int)
297838	Diane Crusco (I)	24-Jan-12	Filter folder	1362BR		Candidate type current type: External Inactive Internal Past employee Agency HR Status: O-Fied
297899	Diane Crusco (I)	25-Jan-12	Filter folder	1344BR		Candidate type current type: External Inactive Internal Past employee Agency Language: English (US)
297956	Diane Crusco (I)	26-Jan-12	Filter folder	1362BR		Candidate type current type: External Inactive Internal Past employee Agency Language: English (US)

- All executed filters for all users who have the user type privilege of either of the following is logged as a separate line in the report:
 - Search - ReqID to conduct search – required
 - Search - ReqID to conduct search – optional
- **Search Type** is always "Filter folder"
- **AutoReqid** column displays associated Req ID for the launching Candidate Results panel
- **Search reason** is always blank
- **Search criteria** column in the Detailed report lists the filter criteria that was set.

How Do Clients Get this Feature?

This feature is controlled by form field attributes and your panel configuration in Workbench. Please contact your Kenexa Support Team or Certified Workbench User for more information.

Workbench Self-Service Certified Users

Workbench task for this feature include:

- displaying multi-select, checkbox, and grid field types on the Candidate Results panel and/or Talent Record
- enabling additional filtering options and functions.

Displaying Multi-select, Checkbox, Grid Field Types

To display multi-select, checkbox, and grid field types on the Candidate Results panel or Talent Record, they must first be made outputable.

To designate as "Outputable":

1. **Tools > Forms >Candidate Forms > Administer form fields > Edit field attributes for specified field > Save and Continue** [to page 2].
 –OR–
Tools > Forms >Candidate Forms > Administer form fields > Add form fields > Save and Continue

[to page 2].

The screenshot shows the 'Define field attributes' dialog box for the field 'MaritalStatus'. The field length is set to 255. The 'Required for form creation from TG' option is set to 'No'. The 'Search / Output' section has 'Searchable?' set to 'No' and 'Outputable?' set to 'Yes', with a red box highlighting the 'Outputable?' options. Below this, there are three columns: 'Used (TEXT)' with value 126, 'Available (TEXT)' with value -1, and 'Enable Search & Output' with an unchecked checkbox. The 'Options source' section has 'Maintain Custom List' selected. At the bottom are 'Save', 'Clear', and 'Cancel' buttons.

2. Set **Outputable?** to **Yes** .
Once you save the field with this attribute set, it becomes available for Candidate Results panel configuration and Talent Record display.

To add to Candidate Results:

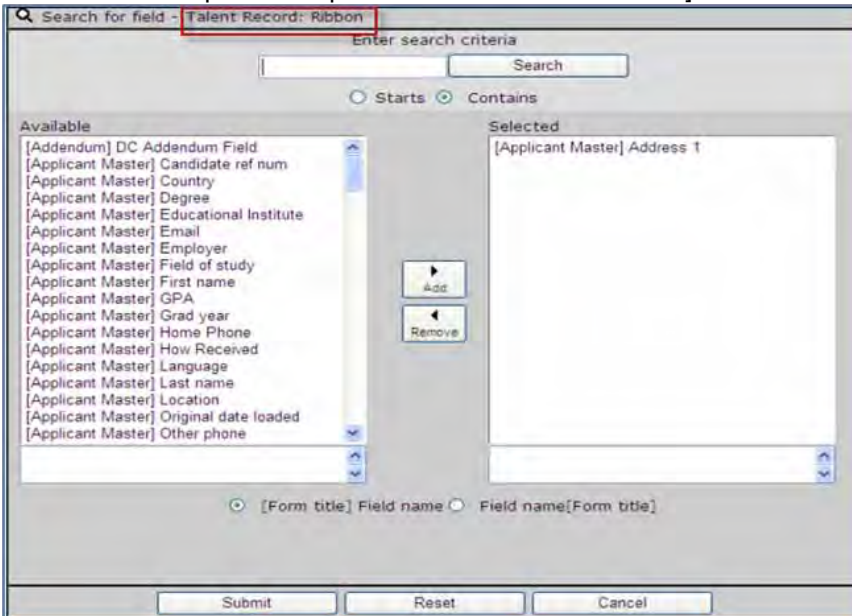
1. Select **Tools > Settings > Panel Configuration > Administer Configuration** [for Candidate Results Panel OR Custom Subpanel (Custom Candidate Results type)] > **Edit** [existing configuration] OR **Add new configuration > Add row > Select field.**

The screenshot shows the 'Search for field - Candidates in: panel configuration' dialog box. It has a search bar and a 'Search' button. Below the search bar are radio buttons for 'Starts' and 'Contains', with 'Contains' selected. The 'Available' list on the left contains various fields such as '[Addendum] AddendumNewField', '[AddModifyViewMy] Salary', and '[Applicant Master] Address 1'. The 'Selected' list on the right contains '[Panel standard] Name'. There are 'Add' and 'Remove' buttons between the lists. At the bottom are 'Submit', 'Reset', and 'Cancel' buttons.

2. Move the desired field to "Selected" and click **Submit**.
3. Check "Allow users to edit panel display options" if desired and save configuration.

To add to Talent Record Ribbon:

1. Select **Tools > Users > User Types > select user type > Screen Display Defaults > Select field** [in desired or added pane of expanded Talent Record section].



2. Move the desired field to “Selected” and click **Submit**.-
3. Check “Allow users to edit display” if desired and save the display defaults.

Enabling Filter Options

To enable additional filter options:

1. Select **Tools > Settings > Panel Configuration > Administer configuration** [for Candidate Results Panel OR Custom Subpanel (Custom Candidate Results type)] > **Edit** [desired CR configuration] > **Edit** [Panel attributes]. The Panel attributes screen appears.

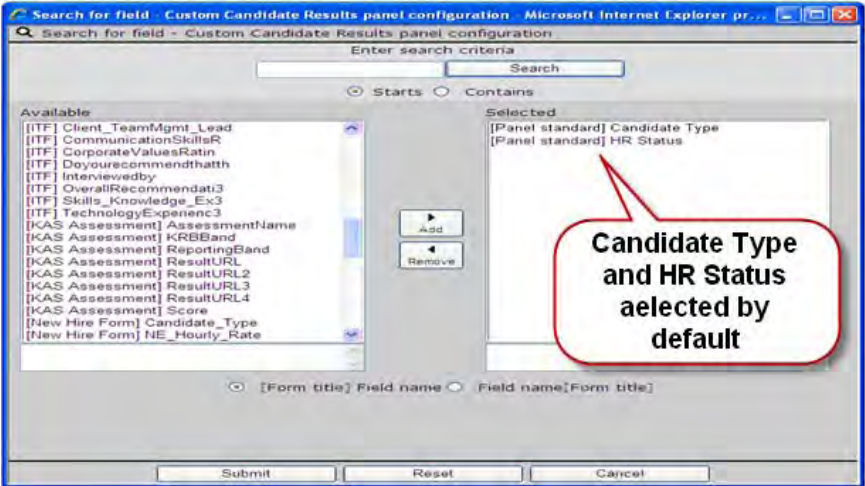
Panel attributes screen for Candidate Results

The **Allow user to save default sort** checkbox (in the Default Sort Options section for Candidate Results or Custom Candidate Results Subpanel configurations) controls whether users can see and use “Save sort with this filter” checkbox when saving a filter.

Panel attributes screen for Custom Subpanels

For custom subpanels, this new **Available filter fields** field replaces the checkboxes that used to be in the Filter Options section.

2. In the Filter Options section, click **List >>**. The Search for field screen appears.



- 3. Move the desired field to “Selected” and click **Submit**. Up to 25 can be selected and submitted.
- 4. Click **Done** on the attributes page and save the configuration.

 When you administratively change Filter Option selections, it triggers the same override message logic as for other panel changes if users have made changes to their panel filters. You can choose to override or preserve user customization.

Reqs – Embedding Video and QR Codes

This feature gives clients the ability to embed Quick Response Codes (QR) or videos in job description fields when creating or editing a requisition. A QR code is a two-dimensional bar code that is readable by dedicated QR barcode readers and camera phones. When users with QR code readers scan the QR code with their smartphones or click on the QR code, they are automatically directed to a more comprehensive jobs information page. Requisitions containing embedded QR codes and videos display on Talent Gateways (TG), Agency Manager (AM), and in hard copy requisitions.

Product	⌋ 2x BrassRing	⌋ Agency Manager
Release 13.1 RDP 636	⌋ 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

2xB users with the “Add Req” privilege can now embed Quick Response Codes (QR) and/or videos in the job description field when editing or creating requisitions. When the requisition’s jobs details page displays on a TG or in AM, candidates can view videos, click the QR code in a digital interface, or scan the QR code in a hard copy document to directly link to a more comprehensive job details page. Candidates do not have to be logged into a TG to view this functionality. Clients can now use this effective method to quickly provide additional job information.

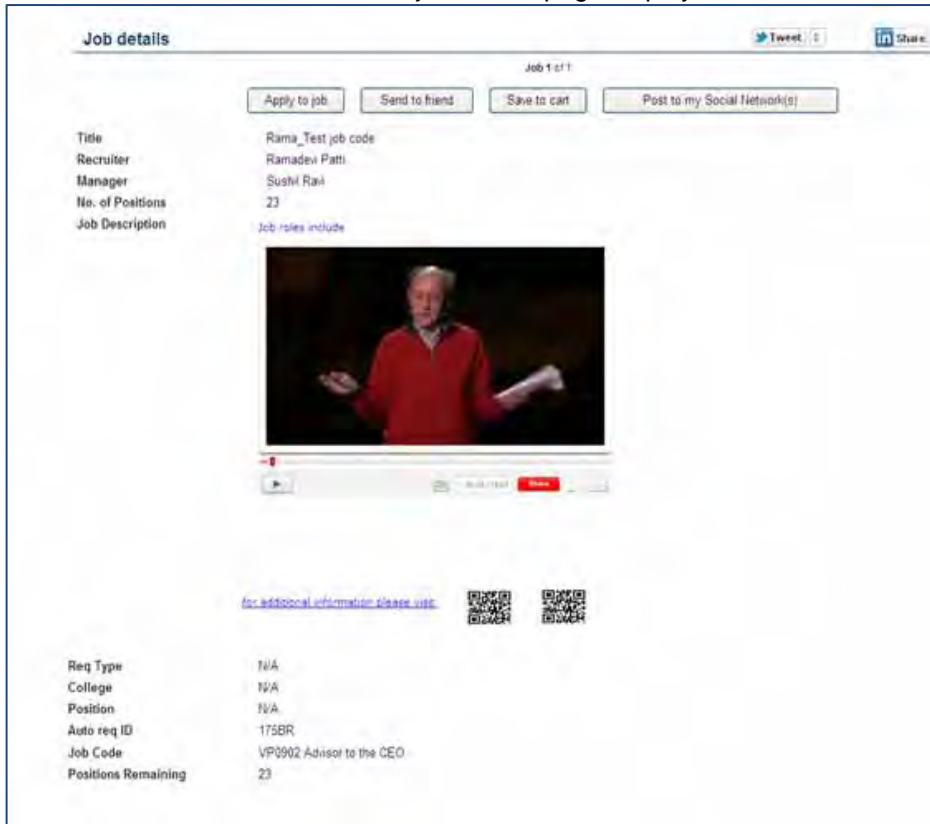
Candidate Experience

Candidates can view videos or click a QR code on a digital interface, or scan a QR code in a hard copy document to view the embedded content (video or text). This functionality is available when candidates click View Job on either a TG or in AM.

Requisition with Embedded Video

1. Candidate uses job search on a TG.

- Candidate clicks View Job and the job details page displays with an embedded video.



- Candidate clicks the Play button to view the video.

Requisition with QR Code

- Candidate uses job search.
- Candidate clicks View Job and the job details page displays with an embedded QR code.



- Candidate clicks the QR code and is directed to a more comprehensive job details page.

Requisition in Hard Copy Document with QR code

1. Candidate scans QR code on a hard copy document with their smartphone.
2. Candidate is directed to a more comprehensive job details page.

2x BrassRing User Experience

2xB users who have the Add Req user privilege can embed videos in requisitions. The video displays when candidates access the jobs description page. Users can also embed QR codes to direct candidates to a particular website with additional material or videos provided there for them.

Embedding a Video

To embed a video, in 2xB:

1. **Req > Add new Req > Select Req Form.**
2. Click **Continue.**
3. Add Job Code. Click **Continue.**
Req details page displays.

Add a new req - Microsoft Internet Explorer provided by Kenexa Technology Inc...

+ Add a new req Help

Select Req Form > Select Jobcode

English (US) Arabic English RTL French English US Government Italian Portuguese (Portuguese) Russian Slovak Chinese (Traditional) Chinese (Simplified)

Req details Spell check

Jobcode ___11__JobCode : ___11__JobCode

Position Title??â&((Edited)

*Job description

Text Editing Area

Font Name and Size: Arial 13 Font style: B I U Lists: [bulleted list] [numbered list]

Indenting: [left indent] [right indent] Alignment: [left align] [center align] [right align] [justify] Colors: [color picker] [highlighter]

___11__JobCode

[Clear formatting](#) [Expanded view](#) [Embed URLs](#)

4. Enter job description text.
5. Click the **Embed URLs** hyperlink.
The Embed URL Dialog box displays.

6. For URL Type, select Video.



- Enter the full URL format (http://www.kenexa.com). [#video#<URL>#/video#]



Currently, the system supports the following video sources: YouTube, Vimeo, and Metacafe.

7. Click **Preview**.
Video preview launches in the dialog box.



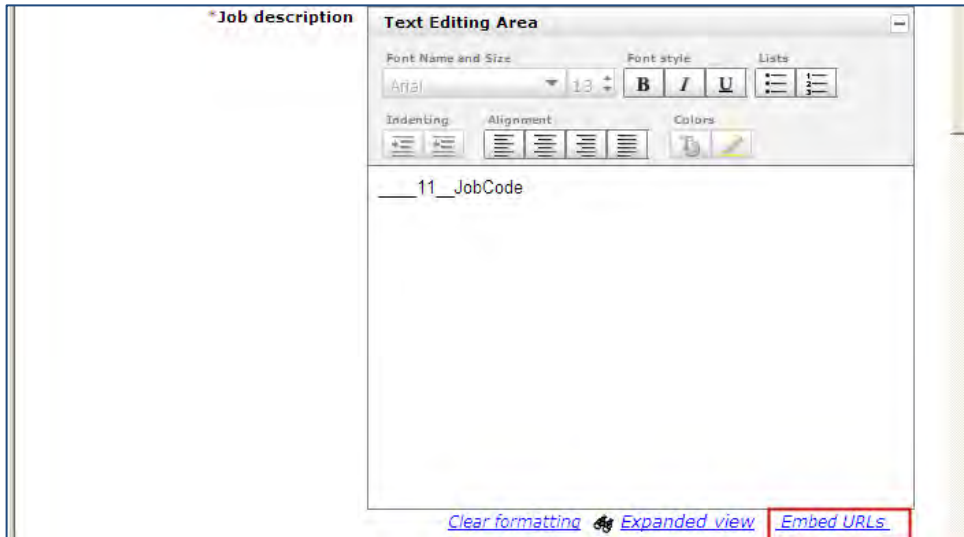
8. Adjust video pixels display size, width and height, if desired.
9. Click **OK**.

The video is automatically added to the bottom of the job description field.

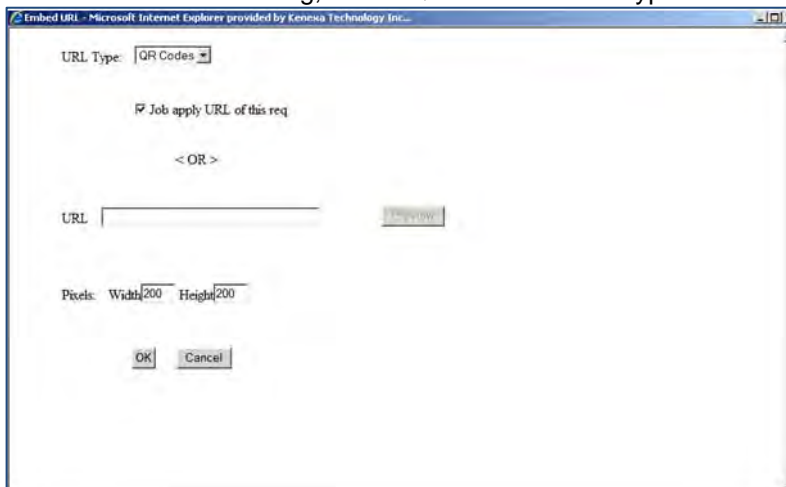
Embedding QR Codes

To embed a QR code, in 2xB:

1. **Req > Add new Req > Select Req Form.**
2. Complete required information, clicking **Continue** until you reach the Req details page, enter the job description text and click **Embed URL**.



3. On the Embed URL dialog, select QR code for URL Type.



4. To enable the Preview option, uncheck “Job Apply URL of this req.”
5. Enter the full URL format (http://www.kenexa.com).
[#qrcode#<http://www.kenexa.com>#/#qrcode#]

- Click **Preview**.
The QR code preview displays.



- Adjust QR code pixels display size, width and height, if desired.
- Click **OK**.

The QR code is automatically added to the bottom of the job description field.

Limitations and Known Issues

- Currently, the system supports the following video sources: YouTube, Vimeo, and Metacafe.
- If the **Embed URLs** client setting is disabled, the existing Videos/QR Codes continue to display on the Talent Gateway and in Agency Manager.

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

2xB users must have the “Add Req” user privilege enabled to use this feature (**Tools > Users > User Types > Edit Type Permissions > Set privileges [for Reqs]**).

Kenexa Tasks

Workbench

This feature is controlled by a new client setting, **Embed URLs**.

1. **WB > Admin > Manage Clients > Edit client settings**, or click the pencil icon after selecting the client.
2. The Edit Client setting screen displays.

The screenshot shows a web browser window titled "Edit client settings - Microsoft Internet Explorer provided by Kenexa Technology Inc...". The page content is titled "Edit client settings" and includes an "Audit Trail" link. The form contains several settings: "ElinkExpirationClicks (1-99)" is a text input with "99"; "ElinkExpirationTime (DD:HH:MM)" is a text input with "N/A"; "ElinkMessage" is a dropdown menu with "Optional - attachment default"; "Email Notification - move/copy/file to folder or req (& integration update to HR status)" has radio buttons for "No" and "Yes" (Yes is selected); "Email tokens - enable Order ID in 2xB" has radio buttons for "No" and "Yes" (Yes is selected); "Embed URLs" has a dropdown menu with "Video - job description" and "QR code - job description" (both are visible, and "Video - job description" is highlighted); "Enable 'To' field in e-mail templates" has radio buttons for "No" and "Yes" (Yes is selected); "Enable additional user information merge fields" has radio buttons for "No" and "Yes" (Yes is selected); "Enable Agency merge fields in blurbs and e-mail templates" has radio buttons for "Yes" and "No" (Yes is selected). At the bottom, there are three buttons: "Save", "Revert to saved", and "Cancel".

3. Click to select one or both of the **Embed URLs** options.
4. Click **Save**.

Reqs – Evergreen Requisitions

“Evergreen” requisitions are used for high turn-over roles for which organizations are continually accepting applications. Our new Evergreen Requisition feature provides a means to keep such requisitions posted for an indefinite period of time. A new optional Archive feature ensures continued acceptable performance, reducing the number of candidates associated with a requisition without removing them altogether.

Product	↳ 2x BrassRing	↳ Workbench Self-Service
LDP091 Re1 13.1	↳ Talent Gateways	↳ Data Insight Tool (post Release 13.1)
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

Evergreen” requisitions are used for high turn-over roles for which organizations are continually accepting applications. This feature provides a means to keep “evergreen” requisitions posted for an indefinite period of time, removing the previous limitation that forced a re-post on an annual basis. Your organization can also define automation triggers for the optional Archive feature. Archiving candidates periodically ensures continued acceptable performance, reducing the number of candidates associated with a requisition without removing them altogether.

Evergreen reqs allow you to:

- Post evergreen reqs for an indefinite period; removing the forced annual re-posting
- Modify the Number of positions, so you can hire an unlimited number of candidates for evergreen reqs
- Manage candidate volume in req folders with the archive folder feature
- Bypass “Enforce final status of all candidates” in primary folder when closing evergreen reqs. (Archive folder does not have enforced disposition when reqs are closed.)
- Optionally exclude evergreen reqs and/or archived candidates for evergreen reqs from Data Insight reports (this feature is coming soon).

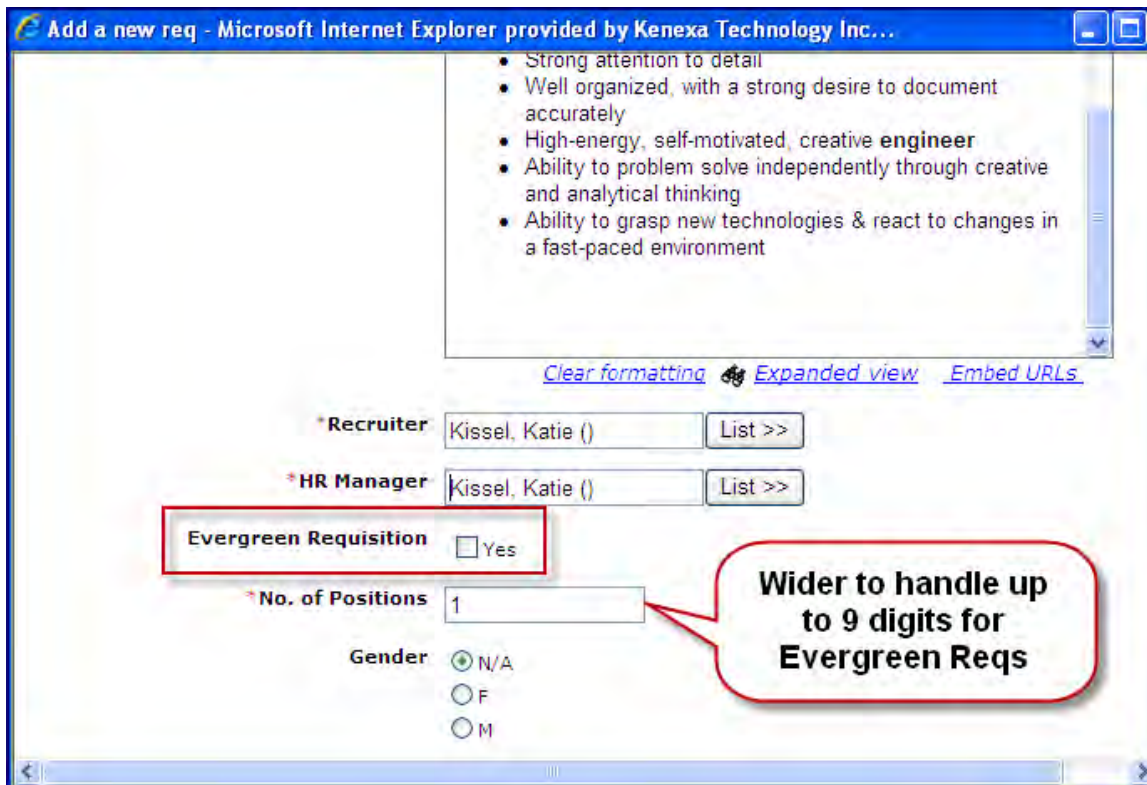
2xB User Experience

When Evergreen Requisition functionality is enabled, 2xB users can mark a req as evergreen when adding reqs, and allow the req to remain posted to Talent and Agency Gateways indefinitely when posting reqs.

Adding Evergreen Reqs

You easily enable evergreen functionality on a per-req basis, using a new custom “Evergreen Req” checkbox field when adding the req.

1. On the “Add new req” or “Edit req” page, check **Evergreen Requisition**.
2. Enter the number of positions to be allowed for the req, up to nine digits (the higher the number, the longer the req can remain open).

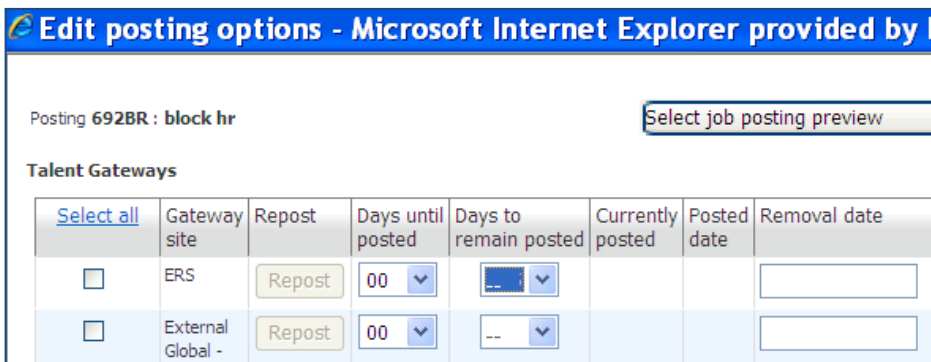


Once the Evergreen Requisition field is checked and saved, the field becomes non-editable in Edit mode.

Posting Evergreen Reqs

When a requisition has the “Evergreen Req” field checked, the “Days to remain posted” drop-down list includes “- -” as an option. This is the default for evergreen reqs. When set to this option, the *requisition has no removal date*. This applies to Talent Gateways and Agencies.

Reqs > All reqs/My reqs > Posting Options Page



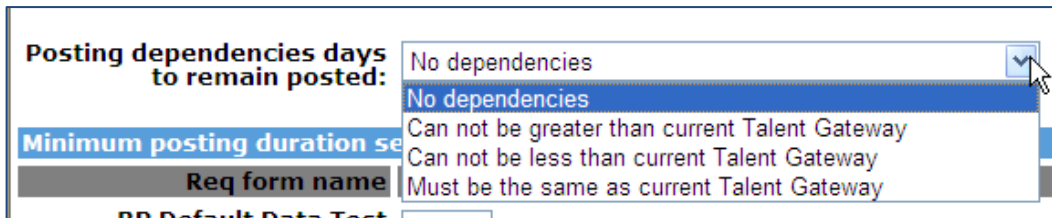
Best Practice Recommendation for Days to remain posted

Set **Days to remain posted** as “- -” for evergreen reqs so they will not automatically unpost for as long as they remain open. The posting remains active until either the option is changed from “- -” to a numeric value, or the req is manually unposted. (If configured to automatically unpost when manually closing, the automatic unposting will still occur.)

Business Rules for Days to remain posted

- Once a req is posted with **Days to remain posted** as “- -”, if the “EvergreenReq” field is unchecked, the existing postings remain unchanged with “- -”. Unposted reqs revert back to standard non-evergreen behavior and options (default to max of 365 days to remain posted).
- The behavior for posting partners is not modified for evergreen reqs
- Effects of **Posting dependencies days to remain posted** rules when **Days to remain posted** is “- -” are as follows:

No dependencies	no business logic required
Can not be greater than current Talent Gateway	any selection meets this requirement
Can not be less than current Talent Gateway	selected gateway must also be set at “- -”
Must be the same as current Talent Gateway	selected gateway must also be set at “- -”



Talent Record Archive Display

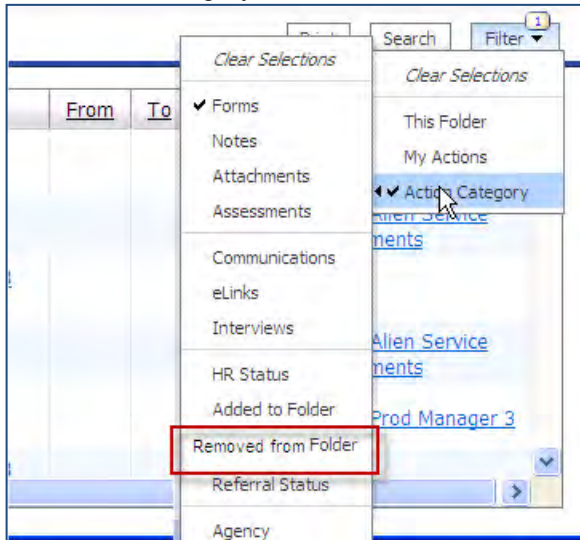
Archiving of candidates for evergreen reqs is done automatically when the candidate meets the criteria of Automation Manager triggers defined for your account. Your organization also sets the schedule desired for the frequency of candidate archiving. The candidate’s Action Log displays new information for a candidate that has been archived:

- When archived, two new lines appear in the Action Log. One indicates the removal from the main folder, the other indicates the addition to the archive folder.
- When reinstated from the archive folder two new lines appear in the Action Log. One indicates the removal from the archive folder, the other indicates the addition to the original req folder

Action	Date	Created by	Details	Request type	Folder	Request
Added to Folder	31-Jan-2012	Buckley, Laurel		Archived		61735 (Archived) Prod Manager 3
Removed from Folder	31-Jan-2012	Buckley, Laurel		Archived		61735 Prod Manager 3
Form Edited	06-Dec-2011	Integration System	Form ID: 59020659	Background Check Results (Standard)		61735 Prod Manager 3
Form Edited	06-Dec-2011	Integration System	Form ID: 59020807	Background Check Results (Standard)		61735 Prod Manager 3

- Archive folders have the same name as the req folders, except with “Archived” appended at the end.

- New Action Category “**Removed From Folder**” is available as an option in the filter list.



- When candidates are archived, their HR Status history for the req no longer displays in the Action Log or HR Status history screen. Forms continue to be displayed/available for the req, similar to when a candidate is moved from a req folder.

Viewing Archive Folders

To view archive folders for evergreen reqs, you must have either “my reqs” or “all reqs” archive viewing privileges. In that case, you see a new Evergreen Archive Folder column (if configured for the your My Open Req and/or All Req panel).

To access the archive folder display:

Click the icon in the Evergreen Archive Folder column.

Req Panel > Archive Folder column

Eln Act	Title	Manager	Total Actr	New	Emp	Review	Evergreen Archive Folder	Phone Scrs	Manager Review	Interview
27HS	Accountant II	Sheppard, Trina	11	2	0	0		2	0	2
30HS	Lead Designer	Sheppard, Trina	2	1	0	0		0	1	0
31BR	General Medical II	Hiring, Joe	52	46	2	1		11	6	9
32BR	Customer Service Rep	Sheppard, Trina	8	2	0	4		3	0	0
34BR	Assistant Accountant	Hiring, Joe	1	1	0	0		0	0	0
38BR	Client Services Rep	Sheppard, Trina	2	1	0	0		0	0	0
44BR	Client Services Rep	Sheppard, Trina	9	8	1	2		2	0	2
45BR	Assistant Accountant I	Hiring, Joe	11	11	1	6		0	2	0
50BR	Security Officer	Sheppard, Trina	0	0	0	0		0	0	0
51BR	Assistant Accountant	Hitterman,	1	1	0	0		0	0	0

If you have the appropriate privileges and aren't seeing the column, you may be able to add it using **Display > Edit Columns** on All Open Reqs or My Open Reqs panels:

Locate [**Custom Subpanel**] **Evergreen Archive** in the Available pane (the name may be customized), move it to **Selected** pane and **Save**. (If the subpanel title has been renamed for your account, the revised name will display in place of “Evergreen Archive.”)

Archive folders are not available for classic UI.

Archive Folder View and Reinstating Candidates

The archive folder view includes the candidate's name, HR Status (at time of archiving), Date Last Viewed, and Date Archived are available for display.

The Reinstatement action is the only action available when a candidate is in archive status. Reinstatement removes candidates from the archive folder and returns them to the Req folder.

To reinstate a candidate:

Select one candidate and click **Actions > Reinstatement**.

You must have the "**Candidates – Reinstatement from Evergreen archive folder (un-archive)**" privilege to use this action.

<input type="checkbox"/>	Name	HR Status	Date Last Viewed	Date Archived
<input type="checkbox"/>	Abboff, Brady	Reference Check	03-Jan-2012	30-Jan-2012
<input type="checkbox"/>	Lariosco, Armando	Reference Check	30-Nov-2011	30-Jan-2012
<input type="checkbox"/>	Tester, Mary	Reference Check	03-Jan-2012	30-Jan-2012

- When candidates are archived, their HR Status history for the req no longer displays in the Action Log or HR Status history screen. If a candidate is reinstated the history will be restored.

Searching for Archived Candidates

The following search conditions apply for archived candidates. You will continue to find archived candidates, but not in the Req folder.

- Candidate Search is independent of any folders the candidate may be filed to, so **Candidate Search** includes candidates who are "archived" in the results.
- For **My Candidate Search**, an archived candidate is not returned.
- For **Filter Req Folder**, an archived candidate is not returned.

Candidate Experience

On the Talent Gateway's "Job submission status" page, archived candidates will continue to see the HR status for the req for which they were archived.

Archived candidates who re-apply to the req are treated as re-applies, and given the HR status designated by your organization. The archive job submission continues to display along with new submission, but the HR status and HR status date are always the most recent value (which would be from non-archive folder).

status 7/15/11

Job submission status

Check the status of your job submission.

- You can withdraw or reactivate your job submission only when the job is "Open" or "On hold" and when no one is being considered for the position.
- If you choose to withdraw or re-activate your job submission, your request will be processed and the updated information will be available at a later time.

ID	Job Submission Date	Job Submission ID	Job Title	Job Status	Job Status Date	URL Link	URL Link Date
18-Aug-2008	32BR	Accountant 3	On hold	27-Oct-2008			
22-Oct-2008	35BR	Assistant Accountant 1	Open	22-Oct-2008			
12-Nov-2008	40BR	Head Accountant IV	Open	22-Apr-2009			
12-Nov-2008	41BR	Elementary Teacher	Open	12-Nov-2008			
12-Nov-2008	42BR	Application Specialist VI	Open	22-Apr-2009			
12-Nov-2008	43BR	Security Team Member 1	Open	18-Mar-2009			
15-Jan-2009	33BR	LB Way Field-BP Test 1	Closed	12-Sep-2011			
15-Jan-2009	34BR	LB Star Chart BP	Open	22-Apr-2009			
12-Oct-2005	145BR	Elementary 5	Open	30-Sep-2005			
17-Feb-2010	125BR	Product Manager - Waltham	Open	09-Dec-2009	0-Filed		18-Feb-2010
26-Feb-2010	134BR	LF135en	Open	22-Apr-2009	0-Filed		26-Feb-2010

- The "Withdraw" button is disabled with tool tip stating, "This record has been archived and is already withdrawn from consideration."
- The "Reactivate" button is disabled with tool tip stating, "This record has been archived. If you wish to be reconsidered for this role, please apply again."

On the Job details page, candidates see these changes, "Removal Date" is blank.

Home
 Search openings
 Search results
 Job details

Job details

Job 1 of 1

Job Code CL 123456 HRIS Manager
Job Description Julie test
Title block hr
Removal Date

Evergreen Req features are only available on WCAG Gateways.

Limitations and Known Issues

If a candidate is archived on the same date they apply, "autofiler" will not recognize that they had already been added to the req folder, so will add them to the primary folder during the nightly processing. Best practice is to archive candidates that are at least one day old.

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

When the client setting for Evergreen Req functionality is set to **Yes**, 2xB automatically:

- Creates a new [custom req field](#), **EvergreenReq**
Add this field to req templates where you want an "evergreen" option.

2xB also makes visible:

- New option for the “Enforce final status of all candidates” req form attribute
Use to [exempt evergreen reqs from final status enforcement](#).
- New [user type privileges](#)
Grant to users who should be able to view Evergreen Archive folders or reinstate archived candidates.
- [Custom subpanel configuration option](#)
Configure the Evergreen Archive subpanel to launch from the All Open Reqqs and My Open Reqqs panels, so privileged users can view archive folders or “reinstate” archived candidates.
- [Automation trigger](#)
Define criteria and schedule for archiving candidates.

Custom Req Field

Enabling the feature automatically creates a new custom req field, **EvergreenReq**. The field can be added to all req forms from which evergreen reqs can be created, and used to indicate whether a specific req is to be treated as an evergreen req. The req field can also be used for reporting purposes, to include or remove Evergreen reqs from Data Insight reports.

You can edit or view the field’s attributes in **Tools > Forms > Reqqs > Req Forms > Define Custom Req Fields**

Defaults are:

- Placement
- Database field name = [EvergreenReq]. This field can NOT be modified
- Field name = [Evergreen Requisition]
- Field type = Check Box. This field can NOT be modified.
- Custom report field = “No”
- Posting interface mapping = “None”. This field can be NOT modified.
- Instruction type = “None”
- Font size = “Medium”
- Encrypted = “No”
- HR status restrictions = “No”
- Field length = 255

- Searchable = “No”
- Outputable = “No”
- Options Source
 - Set to “Maintain Custom List”. This field can NOT be modified
 - Custom list has just one option (which can be checked): “Yes”
 - The options list can not be deleted or inactivated, these icons will not be displayed. The options can be edited to modify label and can be translated. No new options can be added, the Add link will not be displayed.

“Evergreen Req” field options



- Field associations will not be configured by default but can be enabled.

Adding Field to Templates

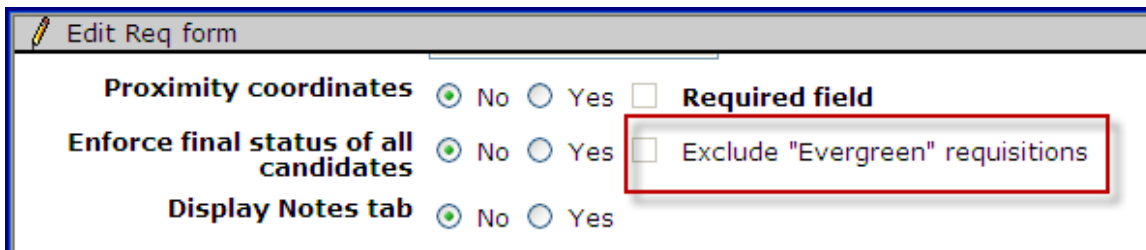
You must manually add the Evergreen Req field to each req template for which you wish to offer the “evergreen” option:

1. Select **Tools > Forms > Reqs > Req Forms > Administer req fields** [for selected form] > **Select req fields**.
2. Locate **EvergreenReq** field and click **Add**.
3. Position the field where desired and click **Save**.
4. To set the user types for whom you want to hide or require the Evergreen Req checkbox field, click **Edit field attributes** [for newly-added **Evergreen Requisition** field].
Best practice – the “EvergreenReq” field should not be unchecked once the functionality has been enable; therefore, it’s best to make it non-editable.
5. Set desired field attributes, click **Save and continue**.
6. Click **Save** when finished.

Req Form Attribute

A new option for the “Enforce final status of all candidates” req form attribute becomes available when the Evergreen Req client setting is enabled. It is **Exclude “Evergreen” requisitions**.

To bypass final status enforcement for evergreen reqs when it’s enabled for standard reqs (“Yes” is checked), check **Exclude “Evergreen” requisitions** option (in **Tools > Forms > Reqs > Req Forms > Edit Form Attributes** [for selected form] > **Enforce final status of all candidates**).



User Type Privileges

For viewing archive folders or “unarchiving” evergreen reqs, the following three user type privileges become available when Evergreen Req is enabled:

- **Reqs 2 > All reqs – view Evergreen req archived folder**
Users with this privilege can view all evergreen req archive folders.
- **My Reqs 2 > My reqs – view Evergreen req archived folder**
Users with this privilege can view their own evergreen req archive folders.
- **Candidate Actions 3 > Candidates – Reinstate from Evergreen archive folder (un-archive)**
Users with this privilege can “unarchive” candidates associated with evergreen reqs who have been archived.

The privileges for viewing the archive folders have no dependency on any other privilege. However, users must have the ability to view the originating req folder in 2xB in order to view the associated archive folder. To reinstate candidates from an archive folder, users must have the ability to view the originating req folder in 2xB and associated archive folder (and, of course, also have the “reinstate” privilege).

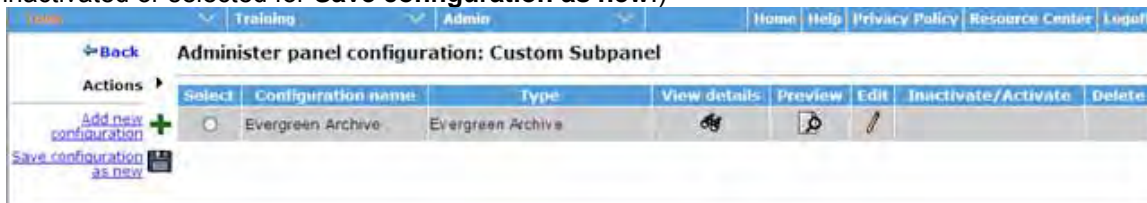
Set the privileges in **Tools > Users > User types > Edit type permissions** [for selected user type].

Evergreen Archive Custom Subpanel

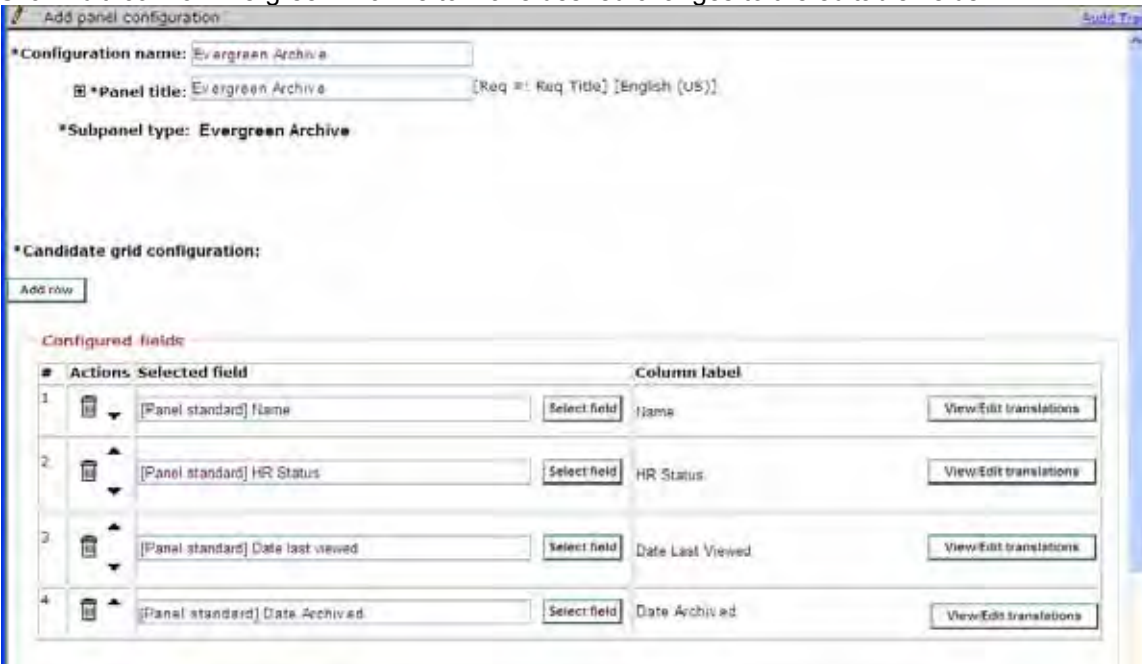
A new “Evergreen Archive” custom subpanel is available when Evergreen Req is enabled. You can optionally edit the panel’s title or remove configured fields, and configure it to launch from My Open Reqs and/or All Open Reqs panels.

To edit the subpanel:

1. Select **Tools > Settings > Panel configuration > Administer configuration** icon [for Custom Subpanel panel]. (On the resulting Administer panel configuration screen, the Evergreen Archive subpanel cannot be inactivated or selected for **Save configuration as new**.)



2. Click Edit icon for Evergreen Archive to make desired changes to the editable fields.



- Configuration name = “Evergreen Archive” (non-editable)
- Panel title = “Evergreen Archive” as a default
- Subpanel type = “Evergreen Archive” (only one subpanel of this type is available per client)
- Candidate grid configuration has following fields by default, which are the only fields that can be selected. You can remove the fields from the panel configuration:
 - [Panel standard] Name
 - [Panel standard] HR Status
 - [Panel standard] Date Last Viewed
 - [Panel standard] Date Archived (available only for Evergreen Archive panel configuration)

3. **Save** your changes.

The only action available from the Evergreen Archive subpanel is **Reinstate**. This action is available only for users **Candidate Actions 3 > Candidates – Reinstate from Evergreen archive folder (un-archive)** privilege.

To configure the Evergreen Archive subpanel to launch

Choose the Evergreen Archive subpanel for one of the columns on All Open Reqs or My Open Reqs panels:

1. Select **Tools > Settings > Panel configuration > Administer configuration** icon [for All Open Reqs or My Open Reqs panel].
2. Click Edit icon for the desired All/My Open Reqs configuration.
3. On Edit panel configuration screen, click **Add row**.
4. Select Evergreen Archive subpanel and click **Submit**.
5. **Save** the panel configuration.

Automation Trigger

Use the new “Evergreen Req – Candidate Archive” automation manager trigger type to define the criteria and frequency of the candidate archiving for evergreen reqs. Archiving should improve performance for these high volume reqs and streamline the recruiter/hiring managers experience by not displaying candidates who are no longer being considered.No new privileges are tied to the trigger.

To configure the automation trigger:

1. Select **Tools > Automation Manager > Admin > Add new trigger**.
2. Enter the trigger name and select the new trigger type **Evergreen Req – Candidate Archive**.

Add Automation Trigger

Trigger Type

***Trigger name:**

***Select trigger type:**
Trigger Description ?

- Candidate HR Status - send Talent Record
- Candidate HR Status Aging
- Evergreen Req – Candidate Archive
- Gateway Posting Expire
- HR Status update - notify candidate
- RAM Trigger
- Req Aging
- Talent Record Viewed - update HR Status
- Update HR Status Across all Reqs for Candidate in Final HR Status

3. Click **Save and continue**.

4. Set the Trigger Attributes

The screenshot shows the 'Trigger Attributes' configuration window. It has three tabs: 'Trigger Type', 'Trigger Attributes', and 'Archive Scheduler'. The 'Trigger Attributes' tab is selected. The window contains the following sections:

- *Select HR Status:** Radio buttons for 'All' (selected) and 'Select HR Status'. Below is a 'Selected (0)' box and a 'Select >>' button.
- *Select Candidate Types:** Radio buttons for 'All' (selected) and 'Select Candidate type'. Below is a 'Selected (0)' box and a 'Select >>' button.
- *Set trigger for Evergreen Req Templates:** Radio buttons for 'All' (selected) and 'Select templates'. Below is a text box containing '"RupakReqForm" Eng US'.
- *Select Candidates Where Date HR Status Last Updated is equal to or greater than:** A text box containing '90' and the label 'days'.

At the bottom of the window are 'Save' and 'Cancel' buttons.

- ***Select HR Status**
select which HR Statuses candidate must currently be in to meet the selection criteria
- ***Select Candidate Types**
select which Candidate Types candidate must currently be to meet the selection criteria
- ***Set trigger for Evergreen Req Templates**
select active evergreen req templates for which candidates should be considered for archiving
- ***Select Candidates Where Date HR Status Last Updated is equal to or greater than:**
Enter the number of days (maximum 999) to elapse since candidate's last status update in order to meet the selection criteria. The automation manager trigger runs at 6AM EST on days it is configured to run, and it considers the "exceeds" # value as anything less than or equal to (<=) today. So if the "exceeds" # = 0, then it will archive all candidates up until the point it runs (from today or any previous day). If the "exceeds" # = 1, then it will archive all candidates from yesterday, but not those from today.

Regardless of the above selections, in all cases, the archiving will only impact Reqs with the custom EvergreenReq field "Yes" box checked. Once the req form is selected in the Automation Manager Archive trigger, the "Evergreen Req" field can not be removed from the req form. Additionally, the template itself cannot be inactivated. Standard Workbench rules also apply; the Evergreen Req field cannot be removed if any data is associated with it.

5. Click the **Archive Scheduler** tab to define the frequency with which the archiving should occur.

Trigger Type **Trigger Attributes** **Archive Scheduler**

The archive scheduler determines how often your trigger will run and check for instances that have met the defined archiving parameters. For example, a weekly recurrence pattern set to Wednesday would run the trigger every Wednesday and check for candidates that have hit the archiving parameters since the last time the trigger was run (the previous Wednesday).

Run trigger recurrence:

Weekly Run trigger check every week(s):
 On the following days:
 All
 Monday Tuesday Wednesday Thursday
 Friday Saturday Sunday

Monthly Run trigger check:
 Day **OR** The
 For the following months:
 All
 January February March April May June
 July August September October November
 December

6. Select trigger recurrence:

Weekly

Run trigger check every # week(s):

- If set to 1, the trigger runs every week, starting from the date the trigger is created
- If set to 2, the trigger runs every other week, starting from the date the trigger is created
- If set to 3, the trigger runs every 3 weeks, starting from the date the trigger is created
- If set to 4, the trigger runs every 4 weeks, starting from the date the trigger is created

All are ongoing until the trigger is inactivated.

On the following days:

- Select **All** (to run trigger daily) or a specific day for the weekly trigger

Monthly

Run trigger check:

- Select a day of the month –OR– single-select from values **First, Second, Third, Fourth, Last** and from values for *day of the week* or **Day, Weekday, Weekend Day**.

For the following months:

- Select **All** (to run trigger monthly), or months desired for less frequent archiving. By default the selection is Monthly, Day 1, All months.

When the trigger runs:

- If no archive folder yet exists for a given req (of selected req template and with EvergreenReq field = Yes), trigger will create archive folder.

- Candidates in reqs that meet the trigger criteria will be moved from the req folder to the associated archive folder (along w/ associated candidate data).
- HR Status history for candidates archived for the req will no longer be displayed in the Action Log or HR Status history screen. When un-archived, the history will be restored.
- Forms will continue to be displayed/available for the rReq, similar to when a candidate is moved from a req folder
- The candidate will continue to be found in Search but they will not be found in the Req folder.
- If the candidate already has an archive record (in the event of Apply>Archive>Reapply>Archive) then any old entries in archive folder will be overwritten during the archive process for a candidate.

No. of Positions

The No. of Positions req field on req forms was extended from 4 digits to 9 digits. This allows greater hiring counts for evergreen reqs. You'll see this wider field when adding or editing req forms (in Tools > Forms > Reqs > Req Forms). 2xB users using the template see the wider field when adding or editing reqs.

Archived candidates' HR statuses do count towards # of Positions.

Kenexa Tasks

The new “Evergreen Req” client setting triggers multiple actions/enabements in Workbench.

Workbench

Admin > Manage Clients > Edit client settings > Evergreen Req

The screenshot shows the 'Edit client settings' interface for 'Evergreen Req'. The settings are as follows:

- Enable for editor: No Yes
- Encoding of Candidate Emails: UTF-8
- Encoding of System user emails: UTF-8
- EncryptFormFields: No Yes
- EncryptPassword: No Yes
- EncryptTG: No Yes
- Event Manager URL: https://qalabs1.brassring.c
- Evergreen Req (extended posting and archiving): No Yes**
- FileAttachmentSize: 500

When the WB client setting for this extended posting and archiving functionality is set to **Yes**, 2xB automatically creates:

- [EvergreenReq custom req field](#) (see Self-Service section for details). Field must manually be added to desired req forms.

2xB also makes visible:

- [Exclude “Evergreen” requisitions option](#) for the “Enforce final status of all candidates” req form template attribute (see Self-Service section for details)
- [User type privileges](#) (see Self-Service section for details):
 - Reqs 2 > All reqs – view Evergreen req archived folder**
 - My Reqs 2 > My reqs – view Evergreen req archived folder**
 - Candidate Actions 3 > Candidates – Reinstate from Evergreen archive folder (un-archive)**
- [Evergreen Archive custom subpanel configuration](#) option (see Self-Service section for details)
- New [automation trigger](#) type to define criteria for archiving of evergreen req candidates.

Once client setting is set to “Yes” it can not be reset to “No;” this must be done by engineering via a maintenance ticket.

Converting Existing Requisitions

To convert existing requisitions follow these steps:

1. Enable the client setting and add the new custom req field to the appropriate req templates. Reminder: this field is created automatically when the setting is turned on, you do not need to create the field.
2. Use the new Mass Edit feature to update the desired requisitions and set this field to “Yes” or checked.
3. Enter a maintenance ticket requesting that existing postings for Evergreen reqs are updated so the Days to Remain Posted is set to “-”.
4. Enable User Types as needed.
5. Configure Automation Manager in accordance with client’s desire.

Reqs – Font Handling in Formatting-enabled Fields

Clients can now see more predictable results for font display in the two standard requisition fields for which formatting can be enabled. The default labels for these two fields are Job Description and Requisition Notes; your organization may have given these fields custom labels. This feature is available for pre-populated and manually entered text.

Product	⌋ 2x BrassRing	⌋ Talent Gateways
Release 13.1 RDP641	⌋ Workbench Self-Service	
Visible Changes	⌋ Yes – details in <i>Visible Changes</i> document sent for each release build.	
How do I get this feature?	⌋ Automatic – see details below.	

Feature Description

With this formatting feature enabled for the Job Description and Requisition Notes standard Req fields, when 2xB users create or edit a Req form, the HTML editor module appears instead of a plain text area. (This is existing functionality.) As a result of this enhancement, when the 2xB user adds or edits either of these two Req fields using the HTML editor module, the font display is predictable and consistent throughout the workflow – both on the 2x BrassRing side and on the Talent Gateway.

If a 2xB user applies font formatting, the formatted text displays on the Talent Gateway. If a 2xB user does not apply any font formatting, the text displays with the Talent Gateway (TG) font formatting. Font formatting can be applied to pre-populated and manually entered text in the Job Description and Requisition Notes fields.

Users can see Reqs, including these two formatting-enabled fields, in the following locations:

- When adding or editing a Req on the Add new req and Edit req pages respectively in 2xB.
- When viewing a saved Req on the 2xB Job details page in 2xB.
- When previewing the posted Req on the Edit job postings page in 2xB.
- When viewing the Job Details page of the posted Req on the Talent Gateway. (This is what candidates see as well.)

When adding or editing a req, if the user applies font face and font size styles (and any other styling) to text added to the Job Description and/or Requisitions Notes fields, that styling information displays as expected in 2xB on the Add req/Edit req pages, in the Job details page of the saved Req, and in the Req preview pop-up window on the Edit job postings page; It will also show the identical styling on the Job Details page of the posted Req on the Talent Gateway.

If the user adds text to either of those formatting-enabled Req fields but does not apply any styling to that text, the text displays as entered by the user in 2xB on the Add req/Edit req pages, in the Job details page of the saved Req, and in the Req preview pop-up window on the Edit job postings page.

However, for the posted Req, the Talent Gateway font setting (set within Workbench during Talent Gateway configuration) will determine the font face and font size that is used to render the two formatting-enabled fields. In other words, if your users don't add any formatting to the two formatting-enabled fields when adding or editing requisitions, the two fields will look like all the other fields on the posted Req. This will be the candidate's view of the posted Req.



This feature does not affect existing saved and posted reqs.

This behavior is available for both classic and YUI editors.



When formatting text in HTML enabled standard req fields, 2xB users must highlight the text to activate the font formatting options.

Candidate Experience

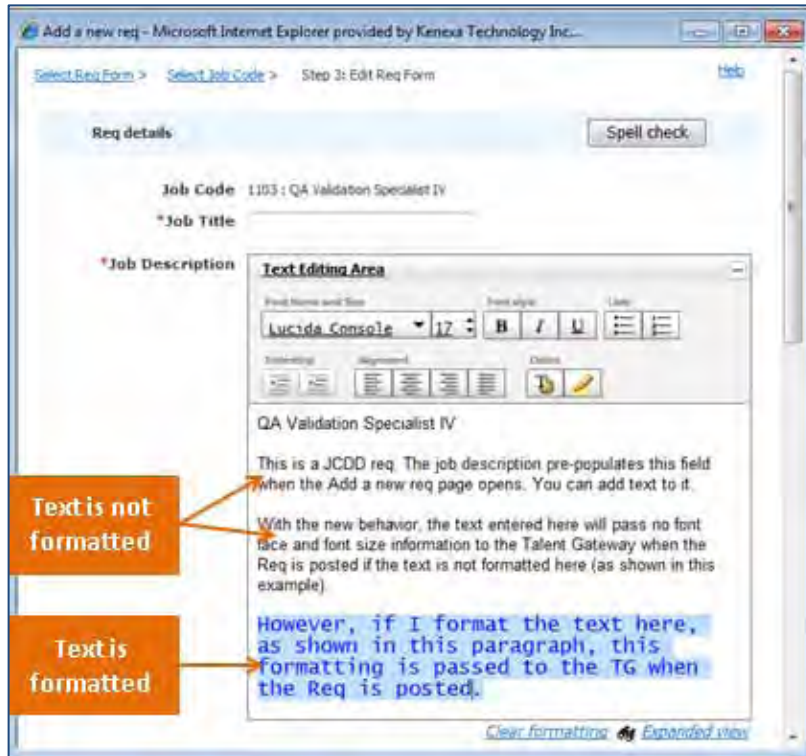
When font formatting is applied to standard HTML enabled req fields, candidates accessing the requisition on a Talent Gateway view the formatted text on the Job Details page.



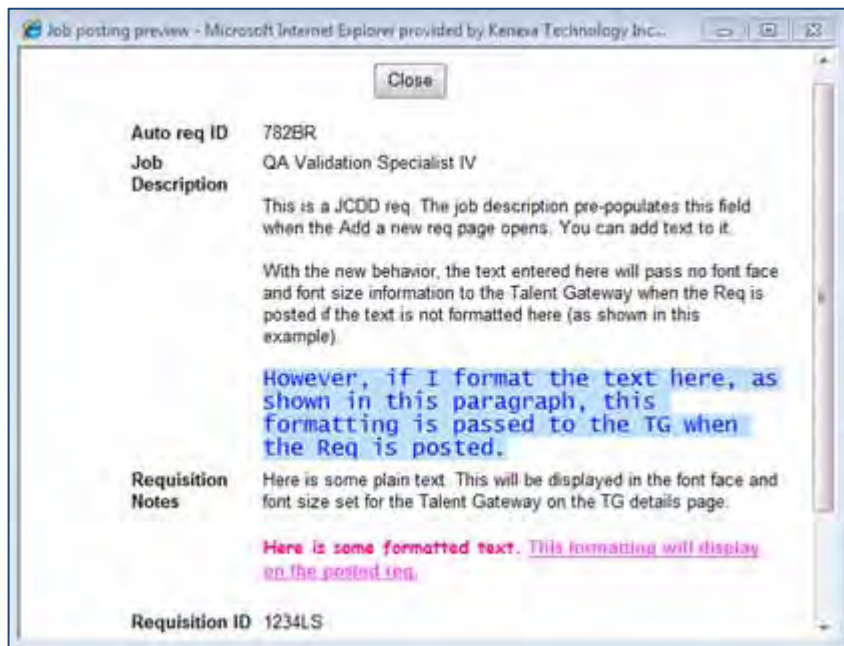
2xB Users

2xB users adding or editing a requisition with this feature enabled can highlight and format some or all of the text in the Job Description and/or Requisition Notes fields and the formatting will be maintained within all views of the req.

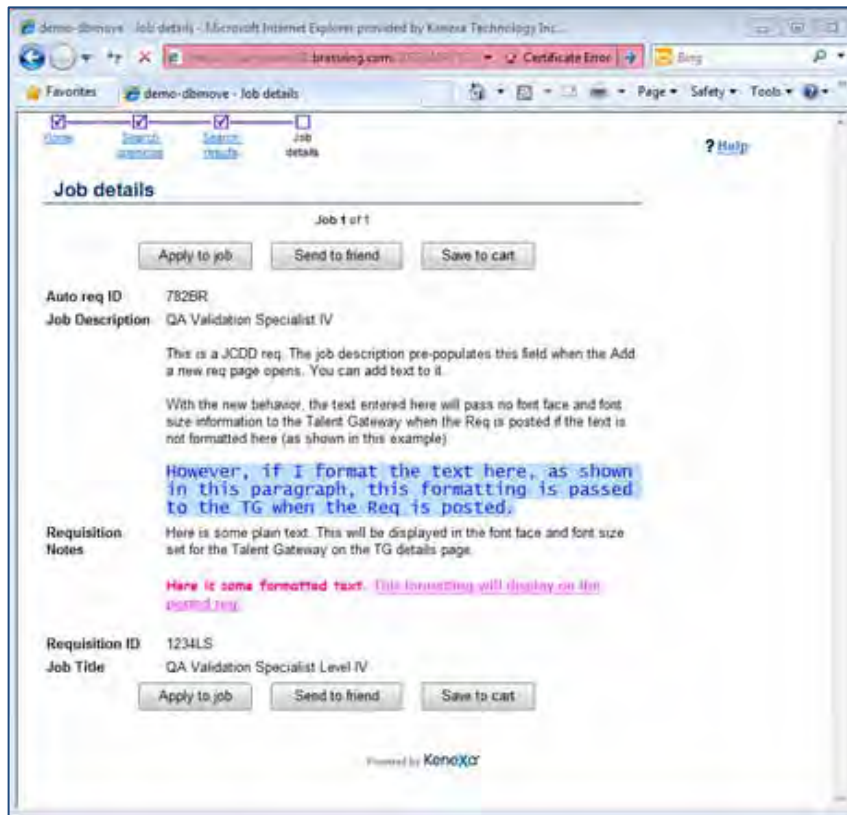
In the following example, a 2xB user added a requisition and applied font formatting to some of the text in the Job Description and Requisition Notes fields. To format text in either of the two HTML standard req fields, the 2xB user highlights the text (manually entered and pre-populated) and applies the font formatting options (font type and size).



When the 2xB user views this requisition in a Job posting preview pop-up window, the req displays the applied font formatting.



When the same requisition is viewed on a TG, the requisition retains the applied font formatting.



How Do Clients Get this Feature?

This feature is available automatically for 2xB users who have font formatting enabled. Please contact your Kenexa Support Team for more information about enabling this feature.

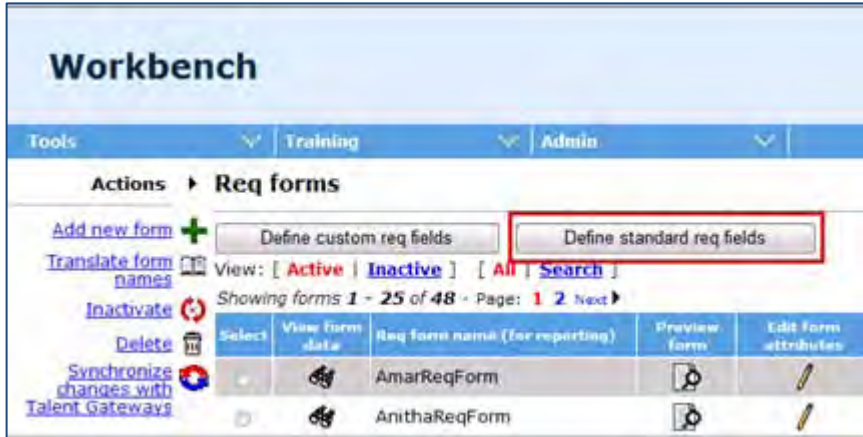
Workbench Self-Service Certified Users

This font handling feature is existing functionality. The following instructions are included as a reminder.

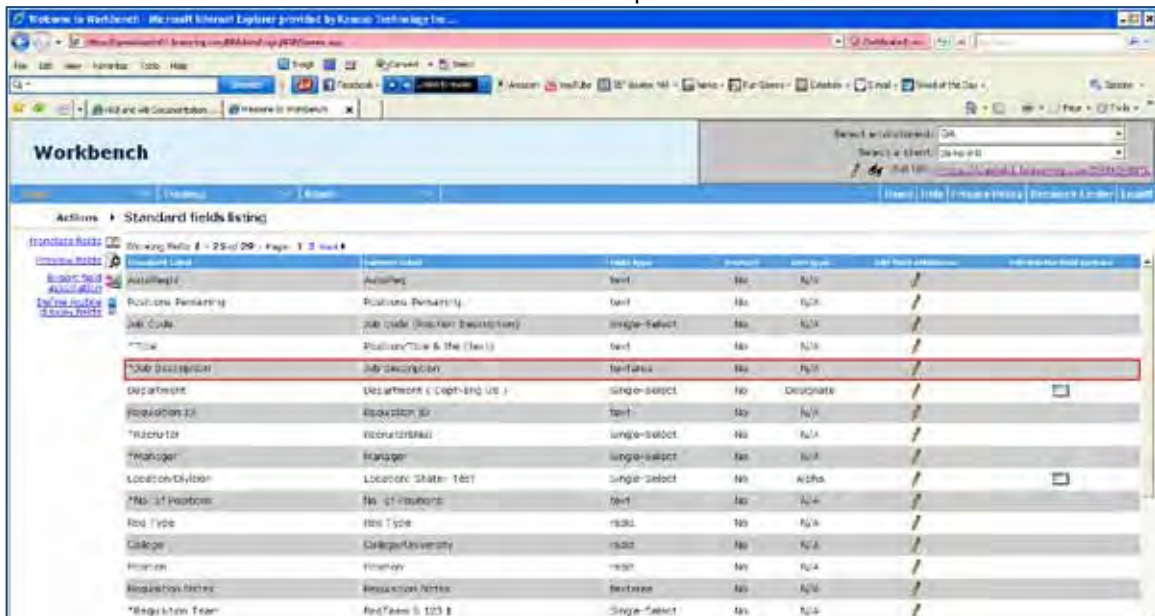
Font formatting can be enabled for two standard HTML enabled req fields, Job Description and Requisition Notes by editing the field attributes. Once enabled, 2xB can then create requisition templates and apply font formatting in these two standard req fields.

Enabling Formatting

1. **WB > Tools > Forms > Reqs > Req forms.**
2. Select a requisition and click **Define standard req fields.**



3. Click the **Edit Field attributes** icon for the Job Description field.



- Select the **Yes** radio button for **Enable Formatting**.

Edit standard Req fields

Placement: 3

Default label: Job Description

Custom label: Job Description [English (US)]

Field type: textarea

Posting interface mapping: Job Description

Font size: Medium

Enable formatting Yes No

Enable spell check Yes No

Hide for these user types: Not applicable, this field will display for all users who have access to view this requisition.

Show in these languages: English (US), Danish, Dutch, English (Int), English US Government, French, German, Italian, Japanese, Spanish

Required for these user types: This field will be required for all users who have access to view this requisition.

Required in these languages: English (US), Danish, Dutch, English (Int), English US Government, French, German, Italian, Japanese, Spanish

Field associations

Enable association: Parent Child

Buttons: Save, Revert to saved, Cancel

- Click **Save**.
- Click the **Edit Field attributes** icon for the Requisition Notes field.

Workbench

Standard fields listing

Field Name	Default Label	Field Type	Required	Form Type	Job Post Attributes	Job-Related Field Controls
Activated	Activated	Text	No	N/A	/	
Positions Remaining	Positions Remaining	Text	No	N/A	/	
Job Code	Job code (Requisition)	Single-Select	No	N/A	/	
Title	Position Title & the (Int)	Text	No	N/A	/	
Job description	Job description	Textarea	No	N/A	/	
Department	Department (English US)	Single-Select	No	Designate	/	
Requisition ID	Requisition ID	Text	No	N/A	/	
Recruiter	Recruiter	Single-Select	No	N/A	/	
Manager	Manager	Single-Select	No	N/A	/	
Location/Division	Location/State/Text	Single-Select	No	Alpha	/	
No. of Positions	No. of Positions	Text	No	N/A	/	
Req. Type	Req. Type	Radio	No	N/A	/	
College	College/University	Radio	No	N/A	/	
HiLevel	HiLevel	Text	No	N/A	/	
Requisition Notes	Requisition Notes	Textarea	No	N/A	/	
*Requisition Team	Req/Team ID	Single-Select	No	N/A	/	

7. Select the **Yes** radio button for **Enable Formatting**.

The screenshot shows a web browser window titled "Edit standard Req fields" with a URL of "microsoft.internetExplorer, provided by Google Technology Inc...". The page content is a configuration form for requisition fields. The "Enable formatting" section is highlighted with a red border, and the "Yes" radio button is selected. Below it, the "Enable spell check" section also has "Yes" selected. The "Hide for these user types" section contains a list of user types: "###LukeTest - all priv", "##Rest", "#rest", "\$D10Mar209-0719", and "\$gpuser type". The "Non-editable for these user types" section contains the same list of user types and an "Extend to add req" checkbox. The "Hide in these languages" section contains a list of languages: "English (US)", "Arabic", "Azerbaijani", "Chinese (Simplified)", and "Chinese (Traditional)". At the bottom of the form are buttons for "Save", "Revert to saved", and "Cancel".

8. Click **Save**.

Reqs – JCDD Update on Approval eLink

This feature automatically updates requisition Job Code Default Data (JCDD) fields on the Approval eLink page during routing approval when a new JCDD is selected for the requisition.

Product Release 13.1 RDP574	⌋ 2x BrassRing
Visible Changes	⌋ Yes – details in <i>Visible Changes</i> document sent for each release build.
How do I get this feature?	⌋ Automatic – see details below..

Feature Description

For clients with “Session.JobCodeDefaultData” and “Session.JobCodeDefaultData Auto-fill on edit” client settings enabled, JCDD fields on the Approval eLink page now update automatically during routing approval when an approver selects a new JCDD code. During the update, if a JCDD field does NOT have an updated value, the saved values in the requisition are retained for all fields (including Job Title and Job Description).

2xB User Experience

2xB users receiving requisitions via eLink approval can now view the Approval eLink details page and select an alternate job code. The Approval eLink page refreshes the eLink Approval page with updated values for JCDD fields.

Limitations and Known Issues

Smart Approval is not supported. 2xB users must have the following client settings enabled: “Session.JobCodeDefaultData” and “Session.JobCodeDefaultData Auto-fill on edit”.

How Do Clients Get this Feature?

This feature is available automatically without configuration.

2x BrassRing Users

In 2xB:

1. User creates a requisition with a specific JCDD code and routes the requisition for approval.
2. Approver receives eLink email and clicks the eLink Approval page.
The eLink Approval page displays.



3. Approver clicks the **List** button and selects an alternate JCDD code. The eLink Approval page refreshes with updated JCDD fields.
4. Approver clicks **Save**.

Reqs – Notification Alerts

This feature provides real-time notification alerts for requisition approval requests, requisition status updates, and 2xB new user req additions. Alerts display as an icon to the right of the 2xB menu bar and as a desktop alert. 2xB users can click the alert icon to access detailed requisition information (hyperlinks) and to approve or decline requisitions. Both notification alerts display throughout the 2xB application.

Product RDP633 Release 13.1	⌘ 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

Real-time (with a minimal buffer) notification alerts for requisition approval requests, requisition status updates, and new user req additions can now be configured to display in 2xB. Notification alerts display as an icon to the right of the 2xB menu bar and as desktop alerts. When a notification alert is received, the desktop alert displays in the lower left of the application and then fades.



Simultaneously, the alert icon to the right of the 2xB menu bar turns red and displays a numeral representing the number of unread alert notifications.

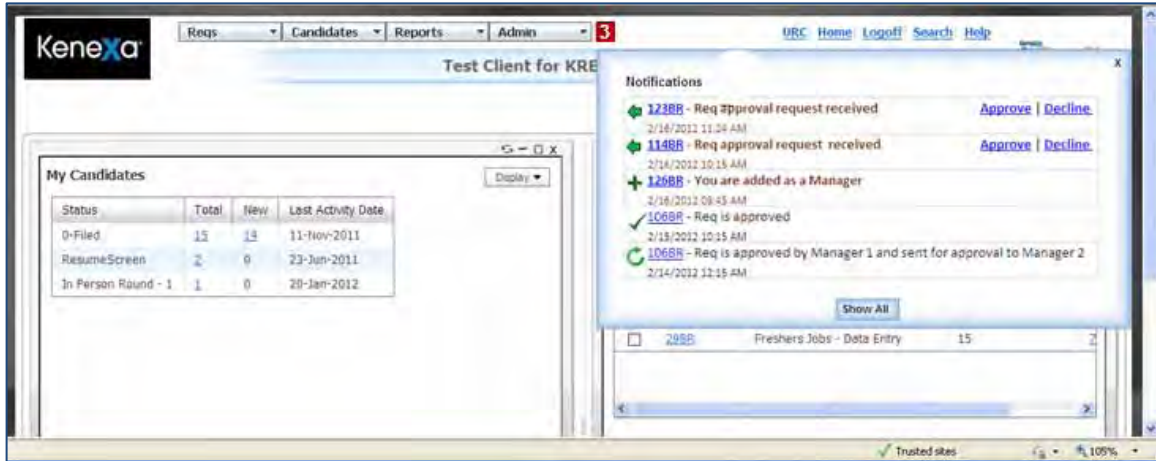


In addition, 2xB users can click the alert icon to access a drop-down notification window listing the five most recent requisition alerts. In this window, 2xB users can approve, decline, click the hyperlinked Req ID to view details about each requisition, or click Show All to view all alerts received in the last 30 days.

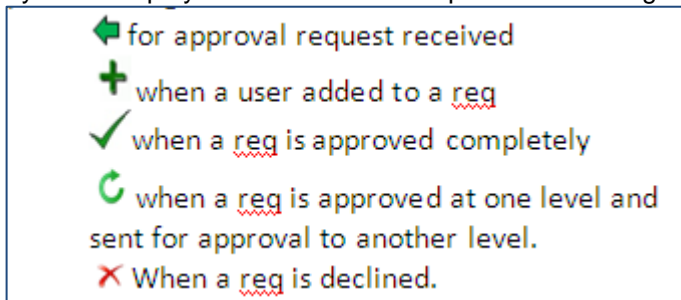
2xB User Experience

- To activate the drop-down notification window that displays the last five active and past alerts, click the alert icon. Alerts are listed in descending order according to the date the alert was received. Dates are localized within the 2xB application. 2xB users with multiple roles on one requisition receive only one alert notification.
- To display all notifications received within the last 30 days, click “Show All.”

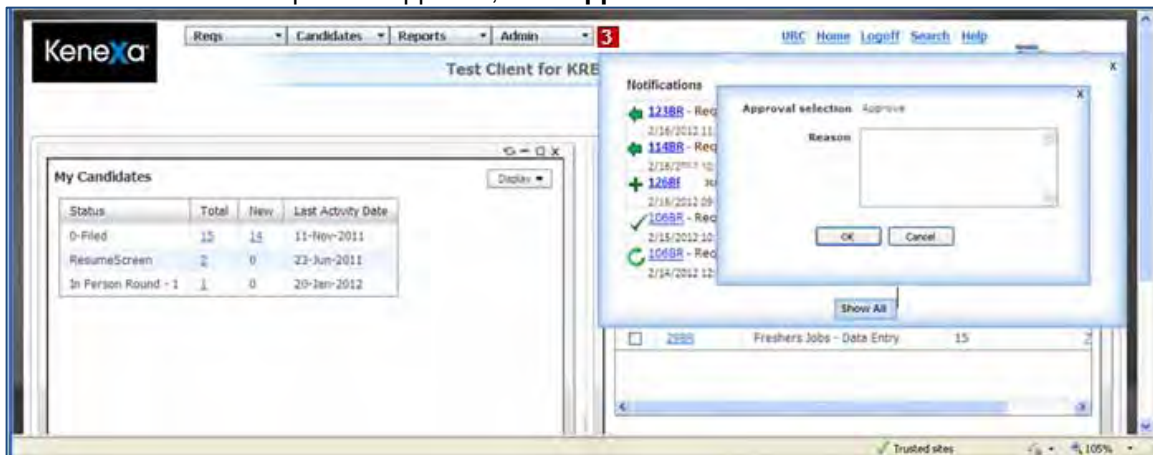
The following example shows the icon representing the three (3) unread alerts and the notifications window displaying the last five notification alerts. Once you access the notification, alert icons turn grey.



Symbols display to the left of each requisition indicating the requisition's status.




- To view requisition details, click the hyperlinked Req ID
- To take action on the requisition approval, click **Approve** or **Decline**.



To approve, enter comments in the text box and click **OK**. The updated requisition status displays in the notifications window.

- To close the notifications window, click the X in the upper right hand corner. The alert icon number changes zero (0) and the background changes to grey.

 **Note:** 2xB users must ensure their Account: Disable Notifications setting is set to No in order to receive notification alerts. Disable Notifications is set to No by default.

2x BrassRing Admin/Admin+ Users

2xB users with “Edit My Account” privileges can temporarily disable notification alerts. To disable requisition notification alerts:

1. **Admin > Edit My Account.**
The Edit Account screen displays.
2. Select the **Yes** radio button to disable notifications.



3. Click **Save**.

If a 2xB user re-enables notification alerts, the system displays notifications received for the last 30 days.



2xB users must ensure their Account: Disable Notifications setting is set to **No** in order to receive notification alerts. Disable Notifications is set to No by default.

Limitations and Known Issues

When disabling this feature, user type privileges must be disabled first before the client setting can be inactivated. The rules-based SmartApproval flows are out of scope at this time.

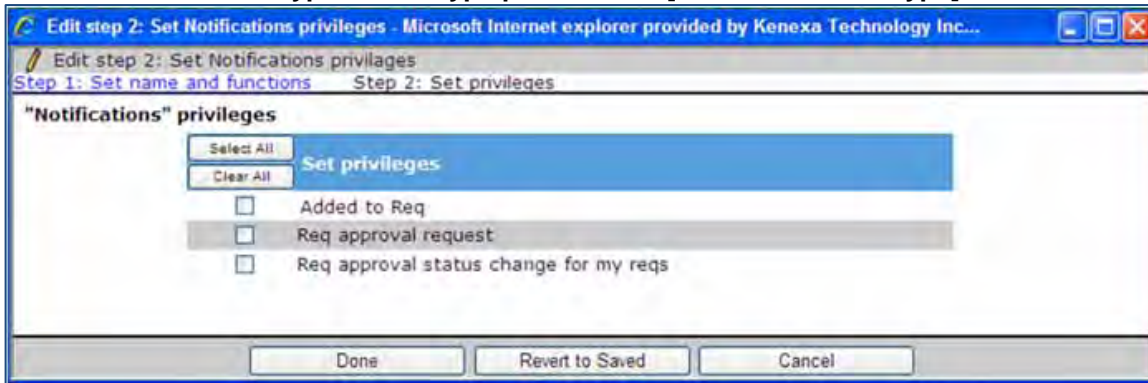
How Do Clients Get this Feature?

This feature is controlled by a new client setting and three new Notifications user type privilege settings. At least one of the three user privileges must be enabled for alert notifications to display. Please contact your Kenexa Support Team or certified Workbench Self-Service user for more information about enabling this feature.

Workbench Self-Service Certified Users

Before enabling the user privilege for req notifications, the notification client setting must be set to Yes.

Tools > Users > User Types > Edit type permissions [for selected user type] > Notifications > Edit



Check the checkbox next to the user privileges you want to enable. You must enable at least one of the user privileges to display the notification alerts. The following table describes the functionality each privilege enables.

Privilege	Description
Added to Req	Enabling this setting sends alerts to 2xB user when he/she is added to a req.
Req Approval Request	Enabling this setting sends alert to 2xB user if a req is sent for his/her approval.
Req approval Status change for my reqs	Enabling this setting sends alert if a req approval status changes for all reqs he/she has a my req relationship with.

Kenexa Tasks

Workbench

This feature requires a new client setting.

Admin > Manage Clients > Edit Client Settings.

Edit client settings - Microsoft Internet Explorer provided by Kenexa Technology Inc...

Edit client settings [Audit Trail](#)

New UI Analytics No Yes

New UI Default panel mapping for new user types No Yes

New/Viewed tied to Req No Yes

Notifications No Yes

Password Frequency 2xB N/A

Password Frequency Agency N/A

Password Frequency Gateway N/A

PasswordFrequency N/A

Posting partner vendor

- Arbita
- Broadbean
- eQuest
- First Advantage

Preferred candidate email (Notify the following users when a candidate meets or exceeds...) Recruiter & Hiring Manager

Save Revert to saved Cancel

Select **Yes** for the **Notifications** setting.

Reqs – Workflow Enhancements

Enhancements for requisition workflow include:

- New mass update capability for updating requisition details in bulk (controlled by new user type privileges)
- Separation of **Add job req** and **Save req as new** user type privileges for more flexible control
- Existing Rules Automation Manager (RAM) triggers with an action to update a req field will also automatically re-post the req (if currently posted).

Product LDP082 Release 13.1	↳ 2x BrassRing	↳ Workbench Self-Service
Visible Changes	↳ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	↳ Specific user type privileges required – see details below.	

Feature Description

Enhancements to improve requisition workflow include:

- New mass update capability for updating requisition details in bulk (controlled by new user type privileges)
- Separation of **Add job req** and **Save req as new** user type privileges for more flexible control.

Mass Update

For organizations that maintain a large number of similar requisitions, mass update provides a convenient way to update and re-post them to your Talent Gateways in a consistent, efficient manner for scenarios such as company reorganizations. Appropriately-privileged users can update “My Reqs” or “All Reqs” associated with a specific Req form.

- Search feature provides a means of defining which requisitions are to be included in the update.
- All requisitions meeting the search criteria will be updated, there is no limit to the number of requisitions updated
- You can update fields that have options associated with them (a future release will allow update of text, text area, and numeric fields).



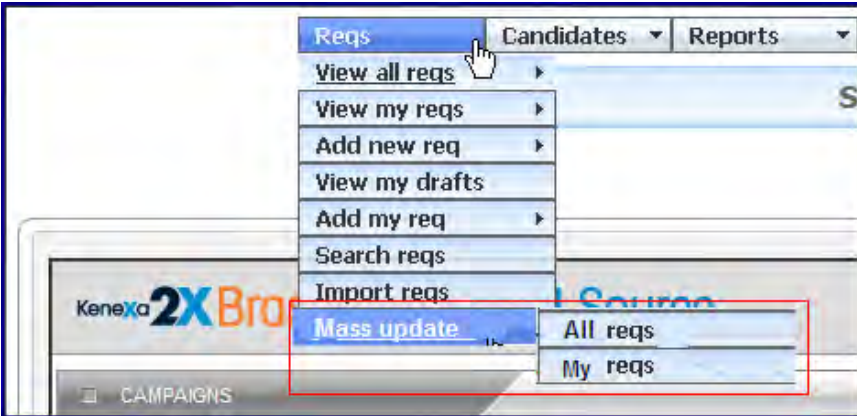
Mass Update does not automatically re-post to posting partners, to avoid potentially incurring additional costs for clients.

2xB User Experience

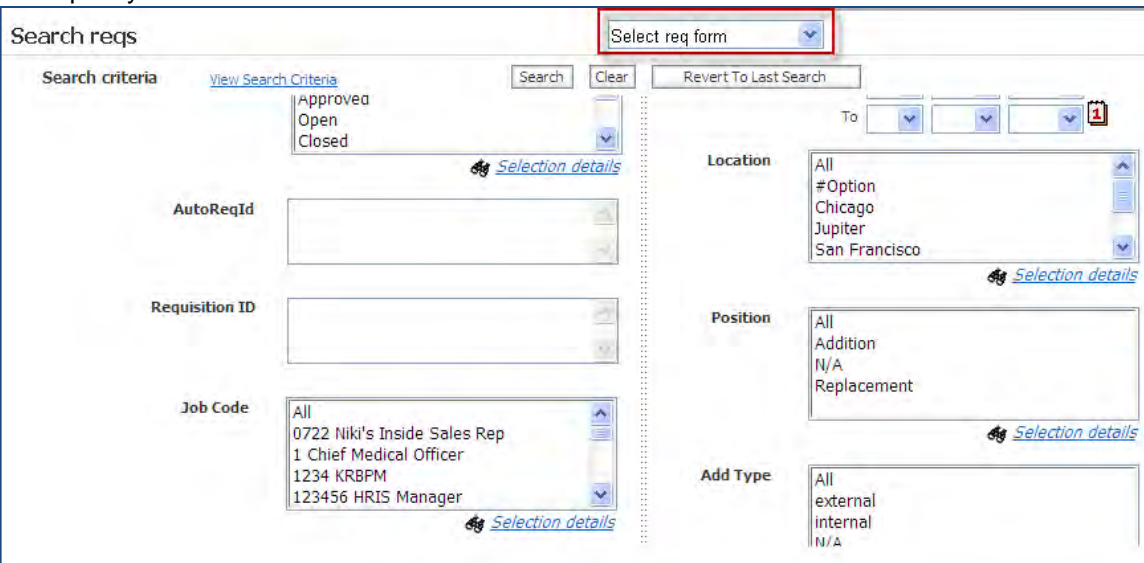
Users must have either the new **All reqs – mass update** or **My reqs – mass update** privilege.

To perform a mass update:

1. Select **Mass Update** from the Reqs menu, and either All reqs or My reqs (as appropriate) from the sub-menu. You see only the sub-menu items for which you have privileges.

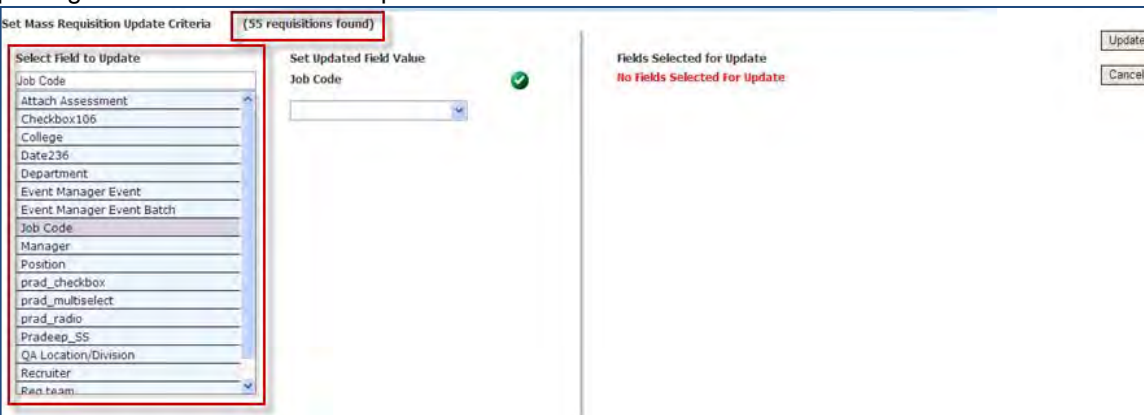


2. On the Search reqs page, you set the criteria for which reqs are subject to the update. Select a req form, then specify the desired criteria.

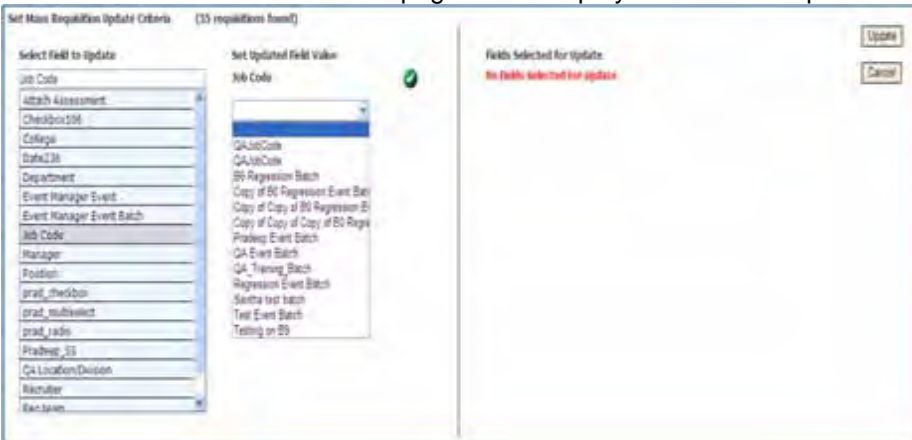


To delete specific reqs, you can specify the up to 100 Auto Req IDs or Req IDs, comma-separated. *Auto req ID must include the full ID including the "BR" designation.*


3. Click **Search**. The "Set Mass Requisition Update Criteria" page opens. All reqs matching the search criteria will be updated within the parameters set on this page. The page shows the fields for which you have privileges in the "Select field to update" box.



4. Click a desired field to refresh the page with a display of that field's options.



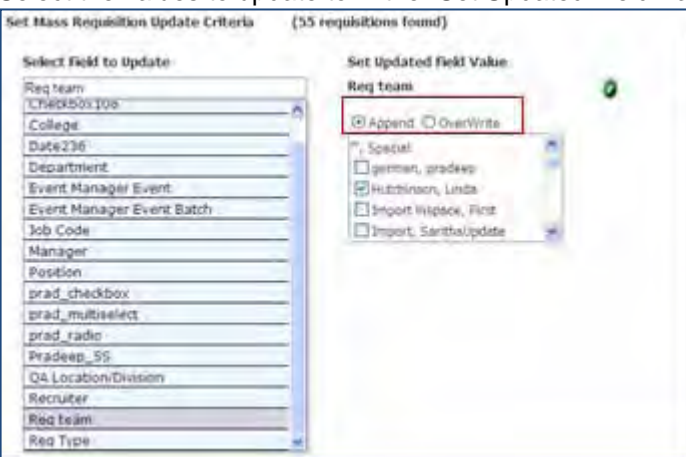
- You can use automated wildcard search to locate the desired field. As data is typed, the list displays only those fields that contain the text being typed (in any part of the field, not simply matching the first letters typed).

 Mass Update respects all user type privileges. For example: if you select **Mass Update > My reqs** and have view privileges only to Open and Pending reqs, then the results set that is used for the Mass Update includes only My Req's in either an Open or Pending state (in addition to whatever search criteria is used to further /refine the results set). When selecting fields to update, you see no fields that are "Hidden" for your user type. If a field is editable by your user type on one req template but not on another, then the field is displayed and you can set criteria. However, when the update is run, only the reqs for which the user has Edit rights are updated, the others will be bypassed.

Fields and options display in the your logged-in language. If not translated into that language, the field or option does not display. If, however, you search for reqs in only one language, the field names and options will display in the selected language.

Only fields that appear at time of req creation are displayed. Fields that are displayed on the req only after creation are not listed (specifically: Keyword, AutoReqID, DateReqPosted, EmployeeName, StartDate, AddType).

5. Select the values to update to in the "Set Updated Field Value" box to the right of the field list.



- To replace current field values with a null value, make no selections for the field value.

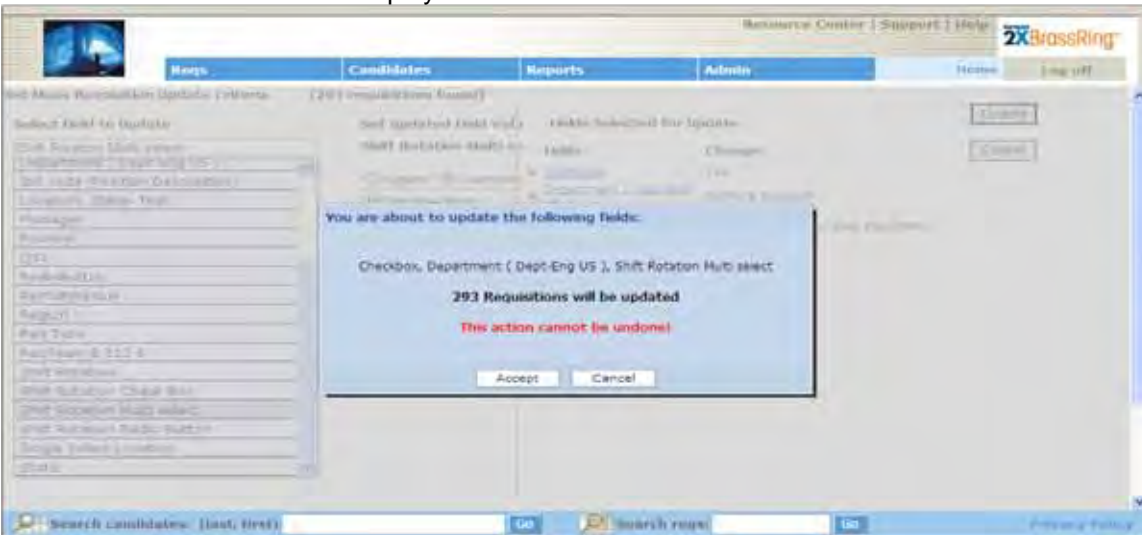
- For multi-select fields, choose the **Append** or **Overwrite** options to determine whether the new options should be added to any existing selections for the reqs, or if they should completely replace what's currently on the reqs.

6. After selecting the options, click the green check mark. This adds your choices to the list of items selected for update and displayed on the right half of the page. (To reset/remove all selections, click the blue arrow.)



- Once update criteria has been set, “Fields Selected for Update” section will display two columns: **Fields** and **Changes**. Hovering on the Fields link will display the full list of options selected.

7. Repeat the two preceding steps as desired for additional field updates you want to make, and click **Update** when finished. A confirmation displays.



8. Click **Accept** on the confirmation if everything looks correct (or **Cancel** and re-set your criteria if it seems necessary).
9. A confirmation of submission appears. Click **OK** to close and return to the set criteria screen.

The update runs asynchronously, queuing 1000 requisitions every minute for processing. Actual processing time will vary based on the number of additional queued items.

Once the update has run, the originator of the update receives email notification that the update has run.

Add Job Req and Save Req As New Privileges

Previously, 2xB users who were given the Add job req & save as new” user type privilege could add new requisitions, and also save a req as a new one. In order to provide more flexibility in controlling the creation or cloning of reqs, these are now two distinct privileges:

- Reqs > Add job req
With this privilege, users can add new reqs. For these users, the **Add New Req** action appears on the Reqs menu and on Actions lists for pages/panels displaying req lists.
- Reqs 2 > Save req as new
With this privilege, users can save a new req from any existing req to which they have access. For these users, the Save As New action or button appears when editing a req, and on Actions lists for pages/panels displaying req lists.

All user types that currently have the “Add job req & save as new” privilege will be given both of the new privileges automatically.

Reqs – Fields Updated by RAM Triggers

Existing Rules Automation Manager (RAM) triggers with an action to update a req field will also automatically re-post the req (if currently posted), resulting in the update being displayed on the Talent Gateway. Thus, a RAM-triggered change will now function the same way that a manual change to a req field would behave; if you edit a field on the req using the RAM, those field updates will now be shown on the Talent Gateway. Currently, they are not, since the req is not reposted with the updated data.

Limitations and Known Issues

For Mass Update:

- For the initial release, only fields with options are supported
- Users will see fields in their base language when not filtering by specific language(s), unless they are filtering for just a single language other than their base language, in that case they will see the fields in the language selected
- Req Field Association is not supported
- Updates done via Mass Update will not trigger additional system updates, other than reposting of the req. for example: reinitiating approval workflow, updating job code default data.

How Do Clients Get this Feature?

The Mass Update feature is controlled by new user type privileges. The other enhancements require no configuration. Please contact your Kenexa Support Team or Certified Workbench User for more information.

Workbench Self-Service Certified Users

Privileges are granted by selecting **Tools > Users > User types > Edit type permissions**.

Add Req and Save As New

These two privileges were created from the former “Add job req & save as new” privilege:

- **Reqs** function category > **Add job req**
Users can add a new job req for those req templates that they have been given access to.
- **Reqs 2** function category > **Save req as new**
Users can *save a new req from any existing req that they have access to*.

Mass Update

The Mass Update feature for updating all reqs or my reqs is controlled by new user type privileges:

- **Reqs 2** function category > **All reqs – mass update** (new privilege)
- **My Reqs** function category > **My reqs – mass update** (new privilege)

These two privileges are unchecked by default.

Kenexa Tasks

Notes on Add job req and Save req as new Privileges

All user types that currently have the “Add job req & save as new” privilege will be given both **Add job req** and **Save req as new** privileges automatically.

When a new client is created, both privileges are also selected by default for the following standard user types:

- Hiring Manager
- HR Coordinator
- Recruiter
- System Admin

The Kenexa logo is displayed in white text on a blue rounded rectangular background. It is centered at the top of the page.

Kenexa

Kenexa 2x BrassRing[®]
Right-to-Left Language Support
and Functionality Exclusions
for
Arabic and Hebrew

2 February 2012

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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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Right-to-Left Language Support

Arabic language support is now available for 2x BrassRing's New UI, Agency Managers, and candidate-facing Talent Gateways. In addition, Hebrew is available for Talent Gateways only. Screens will display from right-to-left (RTL) rather than left-to-right. This document highlights feature support exceptions and the screens that do not support right-to-left orientation.

Arabic

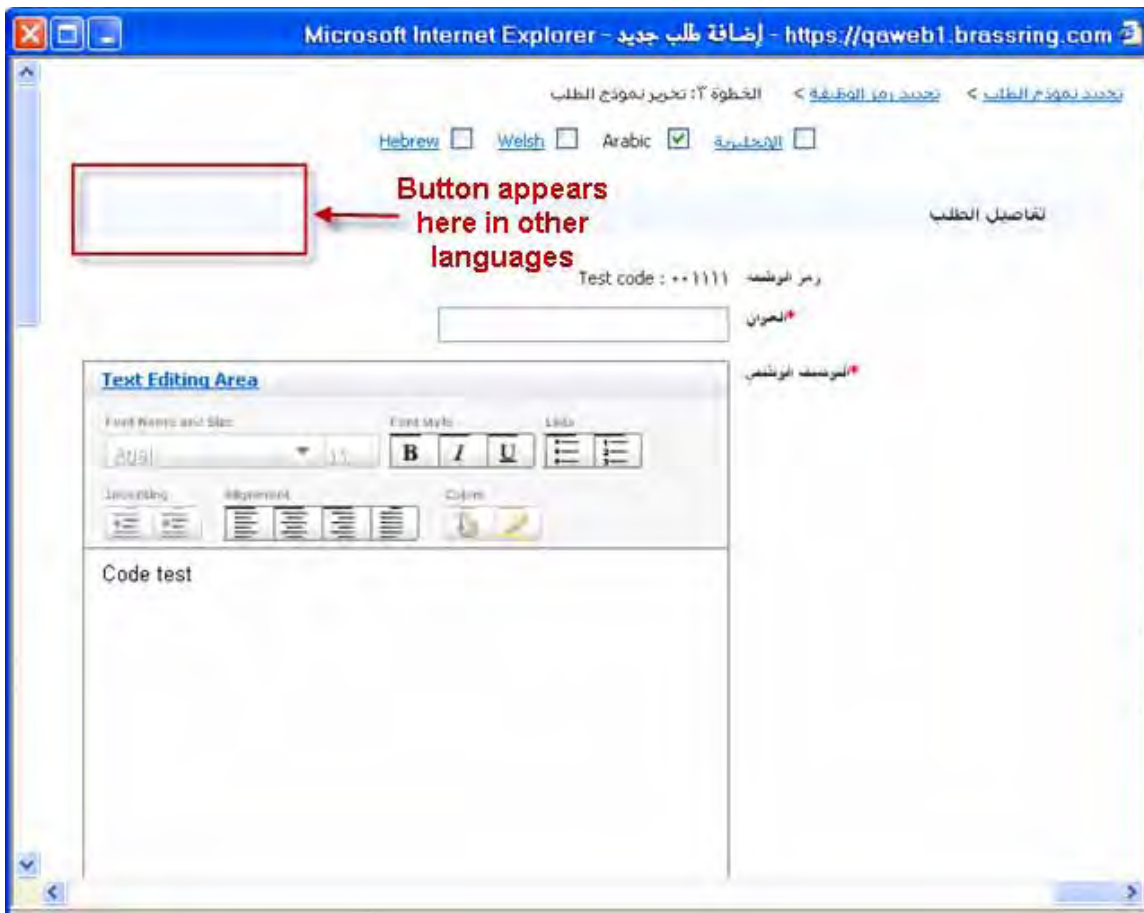
2x BrassRing New UI, Agency Manager, and candidate-facing Talent Gateway Arabic language support is available for the user locale of Saudi Arabia.

New UI 2xB – RTL Support Exceptions

The New UI Welcome page and panels, and New UI Talent Record fully support right-to-left language, with the following exceptions.

Spell Check

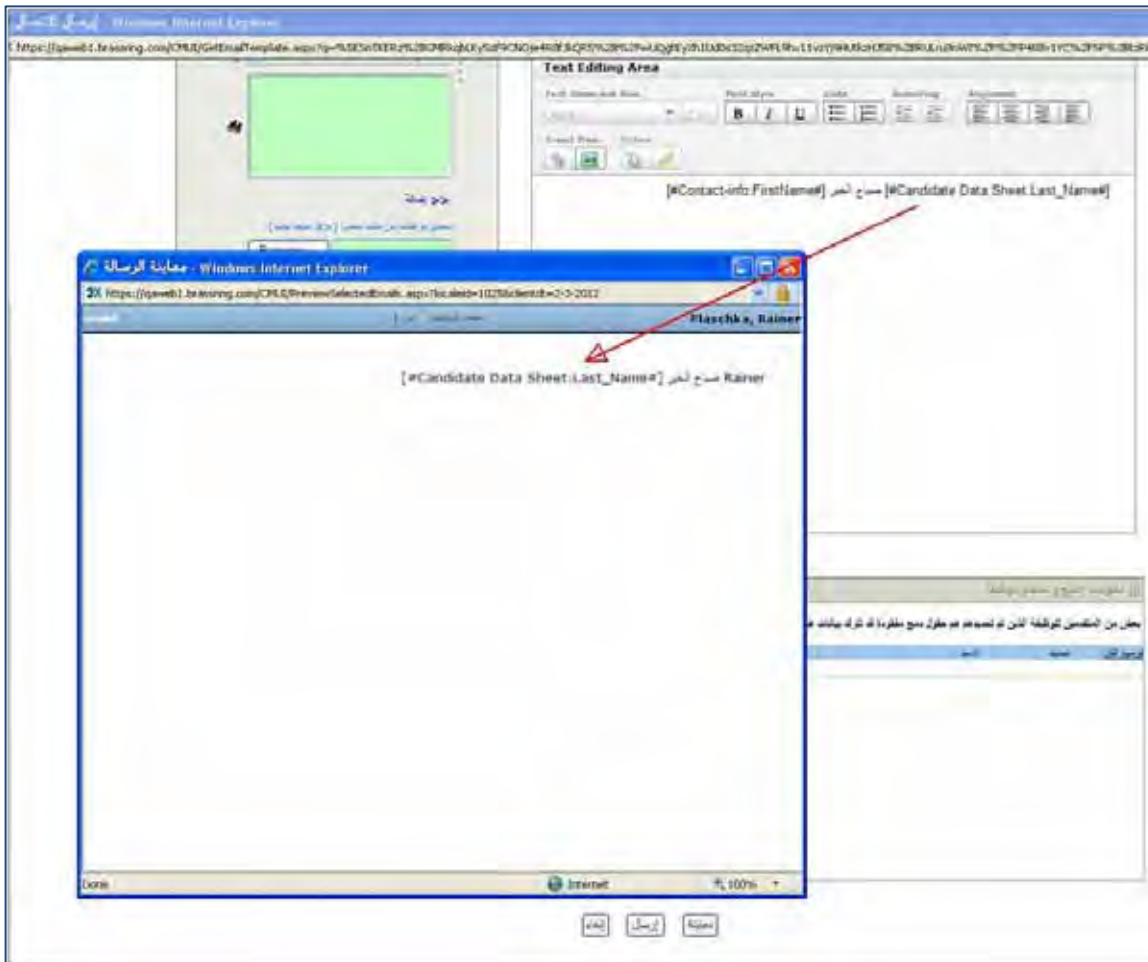
The Spell check feature will not appear for the Arabic locale. Spell check is a third party application and the dictionaries are available only for standard languages. Currently spell check is not supported for any Unicode language. The following shows an example of how the Add req screen looks without the Spell check button in its usual position (when enabled).



Template Formatting and Text Editor

The text editor that displays in the Communications module for creating email and letter templates (as well as for text areas on the Req, as shown in the preceding figure) is not fully translated and displayed in RTL. Starting with "Text Editing Area" and through the text controls, the content is in English and is read from left to right. This is the case with all 2xB supported languages, since this third-party tool is only in English.

For Arabic, the important note is that when tokens are used (for email and letter templates), the editor will switch the order of the tokens and text. The Preview button will display the correct order as it would be viewed by an Arabic user, and the user can then adjust the placement of the tokens based on this preview. Therefore, when users create email and letter templates in Arabic, it is important that they check the preview and pay special attention to the text order.



Calendar and Date/Time Format

The Hirji calendar is very much expected in Saudi Arabia for governmental companies or companies working closely with government agencies. However, multinational companies and companies with ties/relationships to Western organizations often use the Gregorian calendar. For this release, the Gregorian calendar (rather than Hirji calendar with Arabic months and years) will be presented for all calendar pop-ups. Months and Days are translated into Arabic and read from right to left, and as of Release13.0 Build 3, the calendar week for Arabic users will start on the right with Sunday (prior to that it started with Monday).

Calendar viewed on an English Operating System



Calendar viewed on an Arabic Operating System



When dates and times are written out in the application, they are presented using western characters in the following format:

hh:mm:ss yy-mm-dd

This is because time is read from left to right in Arabic (like English), but the date is read from right to left starting with the day, month, then year from the right. An example of date and time in Arabic is:

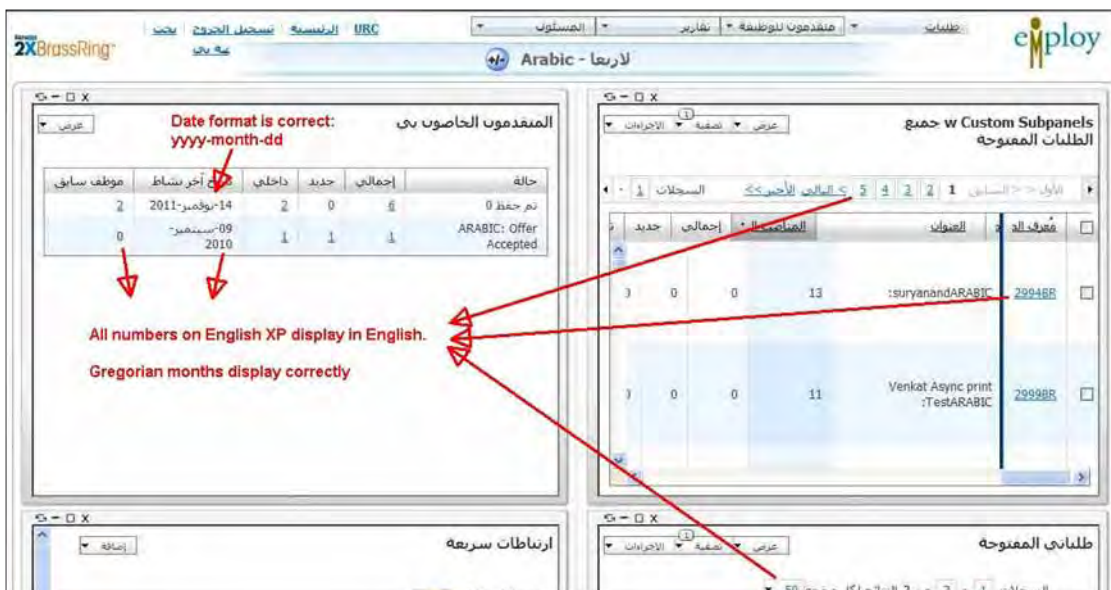
9:30:45 2011-12-11

for December 11, 2011, 30 minutes and 45 seconds after 9.

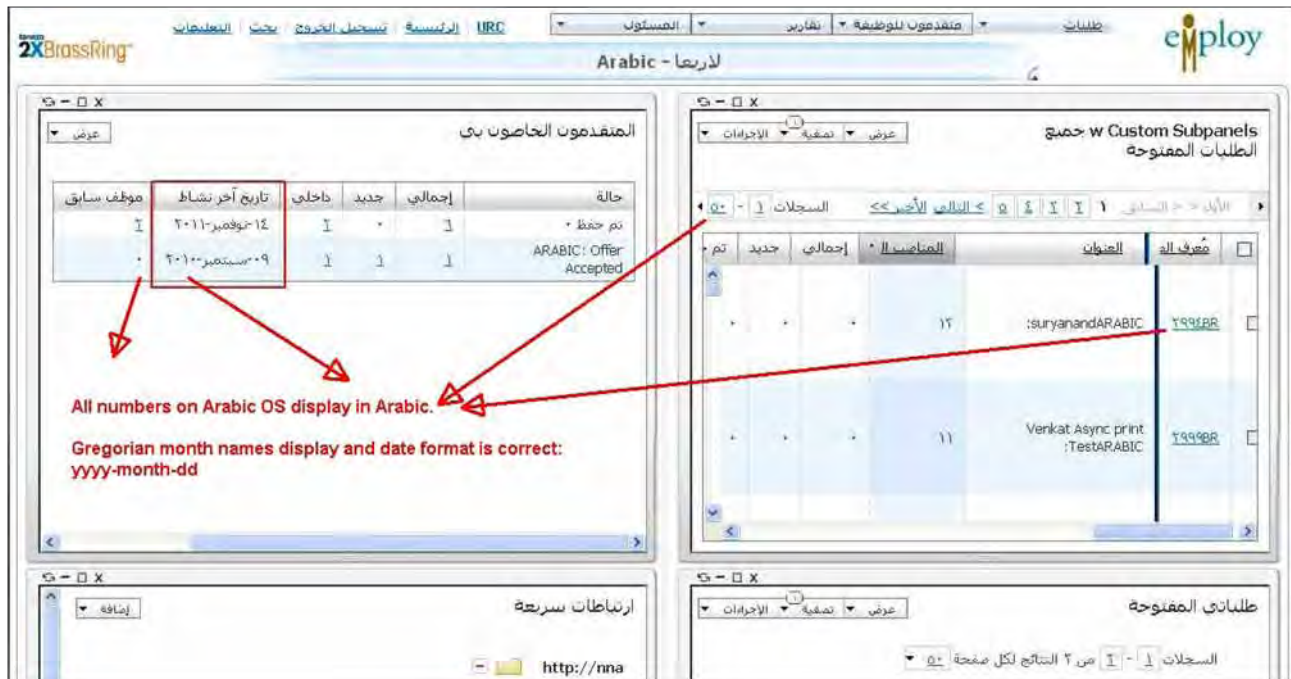
Arabic Numerals

Numbers display in western rather than Arabic characters if the user's operating system language is set to English. If the user's language is set to Arabic, Arabic numerals display in most areas. This can vary, however, based on the user's operating system and browser language.

English XP Operating System*



Arabic XP Operating System*



Change User Language

The user's language (set in the user profile) determines overall RTL and LTR viewing mode, including Req and Candidate Form creation. Reqs are stored independent of justification: an Arabic user views any req in RTL mode, regardless of language, and an English user sees everything in LTR, regardless of language.

When users edit their account and change the language to Arabic, they must log out and log back in in order for the language justification changes to take effect.

Standard Reports

Standard Reports will not be provided in Arabic until Release 13.0 Builds 3 and 4. In Build 3, most standard reports will be fully localized, including correct date format. However, some reports will not be fully localized until Build 4.

Trademarks and Product Names

Products or features that are trademarked, such as Kenexa, BrassRing, Talent Record, Data Insight Tool, will not be translated and will remain in English and read left to right. Additional names that will not be translated are:

- URC
- Enterprise
- Talent Relationship Management
- Workbench
- Talent Gateway*
- TRM
- Data Insight Tool, DIT
- eLink*
- DEW
- 2xB
- BrassRing
- Social Source*
- Kenexa Recruiter BrassRing
- Powered by BrassRing
- Talent Match*

*These items will have translations at a later date based on user feedback on suggested equivalents.

Additionally, in cases where both Arabic and English text appears, such as in title bars and Actions menus, the direction is left-to-right. For example: for Send eLink, the word Send is translated, but eLink is not, so the entire string appears left to right.



New UI Help

The New UI Help file, reached via the Help link on the Welcome Page, is not available in languages other than English – US. Other help within the application on “Classic” pages is translated into Arabic.

Optional Req ID

Optional req ID is not recommended as the primary Req identifier for a client using both LTR languages and an Arabic operating system, since the storage of the unique identifier is not translated. If a non-Arabic user enters English characters in a search where the Arabic characters were entered in the original, the req will not be found. Auto Req ID will store the same way in all languages, so is recommended to avoid this issue.

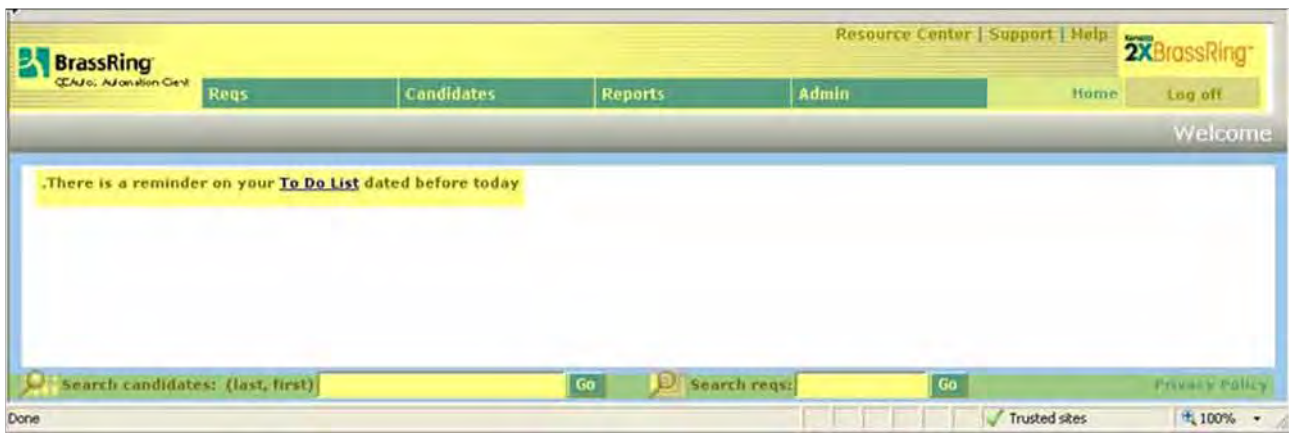
Classic 2xB User Interface – RTL Support Exceptions

Classic 2xB does not support right-to-left languages, except where it shares code in common with the New UI. Thus, turning on the New UI client setting and active User Type Panel mapping at the user type level (for users who are using the Arabic experience) is strongly recommended if the Arabic version of 2xB is used.

The following classic pages may show some RTL aspects since they are part of common code shared with supported pages. However, in the cases shown below, the exceptions are not supported with the common code AND there is an equivalent New UI page, so these aspects will not be supported now or in the future.

These unsupported screens are classic pages (shown in RTL English) that have a New UI equivalent.

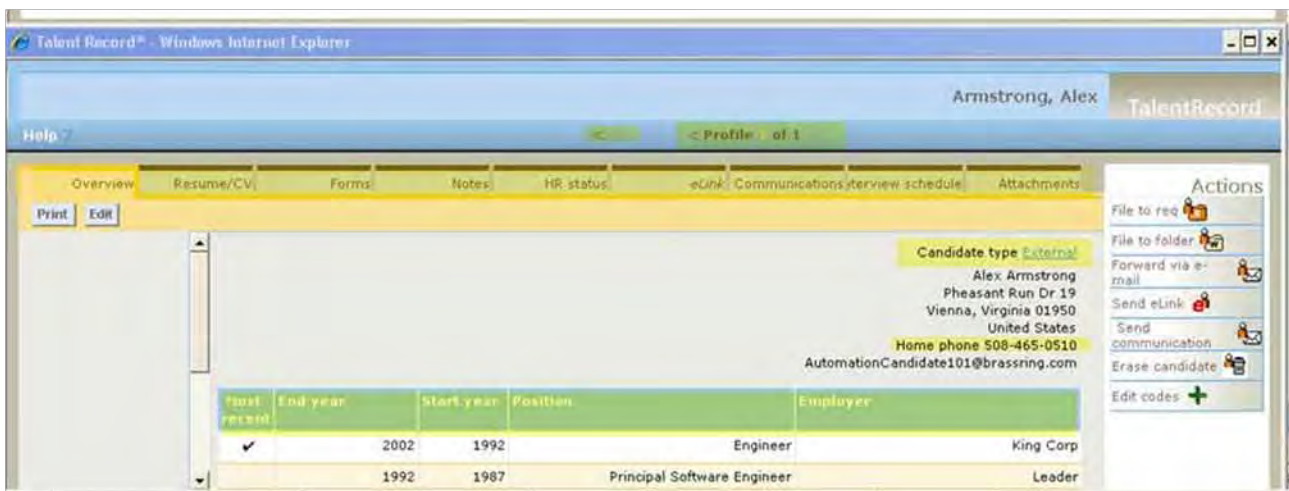
Classic Welcome page



These areas, highlighted in the preceding figure, will not appear right to left:

- Top level links (resource center, support, help)
- Client and BrassRing Logos
- Main menu order and location (Reqs, Candidates, Home, Log off, etc.)
- Welcome message justification
- QuickSearch bar

Classic Talent Record (new Talent Record fully supports RTL)



These areas, highlighted in the preceding figure, will not appear right to left:

- Page navigation at the top
- Tab order
- Grid heading justification (order is right to left)
- Actions – text justification (menu itself is on right side)
- Some field labels in contact info are not to right of field value
- Some other Tabs do display all the buttons within the viewable window making them impractical to use in Arabic.

The New UI Talent Record has full RTL support. Arabic user types should have the New UI turned for fullest RTL display support.

Req and Candidate Grids and Grid Action bar

تاريخ الإنشاء	البريد / الشركة	الإقامة	مسؤول التوظيف	إسمائ المتقدمين للإقامة	المراتب الوظيفية	معلومات	هوية
2012-يناير-16	ARABIC:eBay Canada	RABIC:Discovery Oncology Operations	Challuri, Aparna (123)	Hutchinson, Linda (01721)	0	1	Arabic Qr specialis
2011-نوفمبر-08	ABIC:Cambridge, UK	ABIC:Accounting	Hutchinson, Linda (01721)	Acclaro_enUS, (enUS01 (11	4	1	Arabic_Test_Af
2011-نوفمبر-03	ARABIC:INTL,eBay San Jose2	RABIC:Analytical Chemistry	Acclaro_enUS, (enUS02 (22	Hutchinson, Linda (01721)	8	1	Arabic Req wtl GC
2011-سبتمبر-06	ABIC:Cambridge, UK	ARABIC:ADP (Receptor (MSF	D, Somasekhar ()	Abbasi, Salvatore (4305)	0	1	:fzhARABIC

- Actions menu on Classic Candidate and Req listing pages will appear on the left side, but will be right-justified.
- Classic grids have no fixed headers or fixed columns.

Arabic and Hebrew Candidate Experience – Talent Gateways

Candidate-facing Talent Gateway language support is now available for both Arabic and Hebrew. The following are the exceptions to TG support.

Talent Gateway .ASP URLs

It is recommended that the client setting “Launch TG.NET” should be enabled so that all Arabic and Hebrew Talent Gateways will display correctly. Only the TG.NET/WCAG/ASPX version of TGs support Arabic and Hebrew. URLs containing .aspx display correctly in those languages, but URLs containing.asp do not.

However, **if the “Launch TG.NET” client setting has not already been set to TG.NET, do not change it without also testing the base language and branding.** Instead, when .asp URLs are being used, launch TG.NET (.aspx mode) for any gateway by modifying the TG.ASP URL directly, replacing the italicized string as below.

Original:

https://sqa4-tgweb-02.brassring.com/1033/asp/tg/cim_home.asp?partnerid=25200&siteid=5033

TG.NET Equivalent (modified for TG.NET/WCAG):

<http://sqa4-tgweb-02.brassring.com/tgwebhost/home.aspx?partnerid=25200&siteid=5033>

Unless the “Launch TG.NET” client setting is enabled, redirection from emails and 2xB will go to an ASP page by default. This method also does not automatically adjust TG branding, so you may see some anomalies there.

Resume Extraction not available

For Gateways in Arabic and Hebrew languages, the “Enable auto extraction” setting under **Resume input type** in the Talent Gateway Admin section of Workbench SHOULD NOT be selected. Auto-extraction cannot be supported until a knowledge base is built for the new languages.

Social Media – Login for Talent Gateways


This feature allows candidates to log into their Talent Gateway accounts (existing or new) using their social media credentials.

Product	⌋ 2x BrassRing
Release 13.1 LDP 101	⌋ 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

When this feature is enabled, candidates can log into their Talent Gateway (TG) account (profile) using their social media credentials. During the login process, candidates can associate (map) their social media account to an existing TG profile or create a new TG profile.

Although candidates can map multiple TG profiles to their social media accounts for other functionality, candidates can only map a social media account for login once. For example, for login purposes a candidate who has three TG accounts can map one to Facebook (FB), one to Twitter, and one to LinkedIn (LI). Alternatively, for login purposes a candidate could choose to map one TG account to all three social media sites. Whichever option a candidate chooses, each TG account can only use one set of credentials from one social media site for login.



Note: Mapping Social Media Sites for login and mapping social media sites for other functionality (authorize, preview, and share) are different. For login purposes, a social media site can only be mapped to one set of social media credentials.

When this feature is enabled, candidates can view and change their social networking settings from within their TG account. Candidates can now click the Social Networking Information option from within their TG accounts to view and change settings for all their social media sites. See [Viewing and Changing Social Media Mappings](#) for details.

2xB Candidate Experience

Initially when candidates log into their talent gateway profile using this feature, they must enter their social media credentials and give permission to initiate the mapping of their social media account to their TG account for login. Once established, candidates no longer have to re-enter their social media account credentials when logging into the mapped TG account.

The following workflow is what a typical candidate would experience when logging into a Talent Gateway:

1. The candidate access the Talent Gateway page.




- Candidate clicks the FB Login icon to log into the Talent Gateway.
The FB login page displays and the candidate's email address field auto-populates.



- Candidate enters FB password and clicks **Log In**.
The FB request permission page displays.



 Candidates who have previously authorized access to their social media accounts are not required to reauthorize (grant permission again), and the FB Login and FB Permission pages do not display.

4. Candidate clicks **Allow**.
The Talent Gateway login and mapping page displays.

Just one more step. Why?

Login
Already have BCBSNC -- For Smart Approval Testing account? Please login to map your Facebook account.

Username

Password

[Forgot your password?](#)

We detected that you are already a registered candidate for BCBSNC -- For Smart Approval Testing.

OR

Create Login

Enter your username and choose a password which will enable you to log in and access your information in the future. If you have an e-mail address, we recommend using it for your username. Select a security question and enter your answer. This information will be used to authenticate your identity in case you forget your password.

Username

E-mail address or any unique string

Password [Password security tips](#)

Re-enter password

Select a security question

Answer to your security question

Username guidelines


- Your username can be a combination of alpha and numeric characters.
- Your username must not include spaces or the following characters: < >
- Your username must be less than 100 characters.

Password guidelines

- Your password must be a minimum of 6 and a maximum of 25 characters.
- Your password may not be the same as your username.
- Your password will be case-sensitive.

If you do not have an e-mail address, you can choose one from [Yahoo Mail](#) or [Hotmail](#) to sign up for a free account.


If the Candidate does have an existing Talent Gateway account and the email addresses match, FB auto populates the Login section (top) of this page.

 When using Twitter and LinkedIn social media credentials, the email address does not auto populate.

If the Candidate does not have a Talent Gateway account, FB auto-populates the candidate's email address in the Create Login section.

Candidates must complete this one-time login page. On this page, candidates have two login/mapping options:

- Log into their existing Talent Gateway account using their existing Talent Gateway password. This action maps their existing Talent Gateway account to their social media account.
- Create Login and create a new Talent Gateway account and password. This action maps their new Talent Gateway account to their social media account.

 Candidates with more than one TG account can enter their TG Username and TG Password on the TG login page, and click a social media icon to map that account to their social media credentials. The procedure is the same for each additional TG /Social Media credential process.

- Candidate clicks **Login** to log into an existing account, or **Create** to create a new account. The Talent Gateway Welcome page displays.



Viewing and Changing Social Media Mappings

Candidates can view and change their social networking authorizations from within their TG accounts by clicking the Social Networking Information option. The Social Networking Information option allows candidates to authorize, block/unblock the viewing of public information, and allow/not allow the use of social media credentials for Login.

- Candidate logs into their Talent Gateway account. The **Social Networking Information** option displays on the **Talent Gateway Welcome page**.



Candidates can also access the **Social Networking Information** on the following Talent Gateway pages:

- Edit profile
- Resume/CV and cover letter manager
- Search agent manager
- Job cart
- Saved drafts
- Search openings
- Search results
- Profile source
- Submit resume/CV
- Resume/CV profile information

- Submit attachments
- Questions

2. Candidate clicks **Social Networking Information**.

The **Social Networking Information** page displays. In the example, the candidate has authorized his/her FB account to allow the Post to my Social Network feature, the Show Public Information feature, and the Allow Login feature.



The following table outlines the actions a candidate can initiate on the Social Networking Information page.

Permission Type	Description
Authorize/Unauthorize	When Authorize is active, candidate can Share (Post to Social Network) and Import (Use social media profile with job apply). When unauthorized, Share and Import are disabled and the Show Public Information and Allow Login checkboxes are grayed out and disabled. .
Show Public Information	When checkbox is checked, the social media hyperlink in the candidate’s Talent Record is active and the candidate’s public profile can be viewed. When checkbox is un-checked, the social media hyperlink in the candidate’s Talent Record is not active and the candidate’s public profile cannot be viewed.
Allow Login	When this checkbox is checked, social media login is allowed. When this checkbox is not checked, social media login is NOT allowed.

Revoking Social Media Logins on Talent Gateway

If a candidate wishes to revoke authorization of the social media credentials on a Talent Gateway:

1. Candidate access the Social Networking Information Page and un-checks the **Allow login** checkbox.
2. Candidate clicks **Save**.
The social media/Talent Gateway account credential mapping remains active for the remainder of the login period. When the Candidate logs out of their Talent Gateway account, social media credential mapping is disabled.

Limitations and Known Issues

This new feature will be implemented on WCAG (.net) TGs only and is only available for Full Talent Gateways.

How Do Clients Get this Feature?

This feature is controlled by a Client and a Talent Gateway setting. Please contact your Kenexa Support Team for more information about enabling this feature.

Kenexa Tasks

Workbench

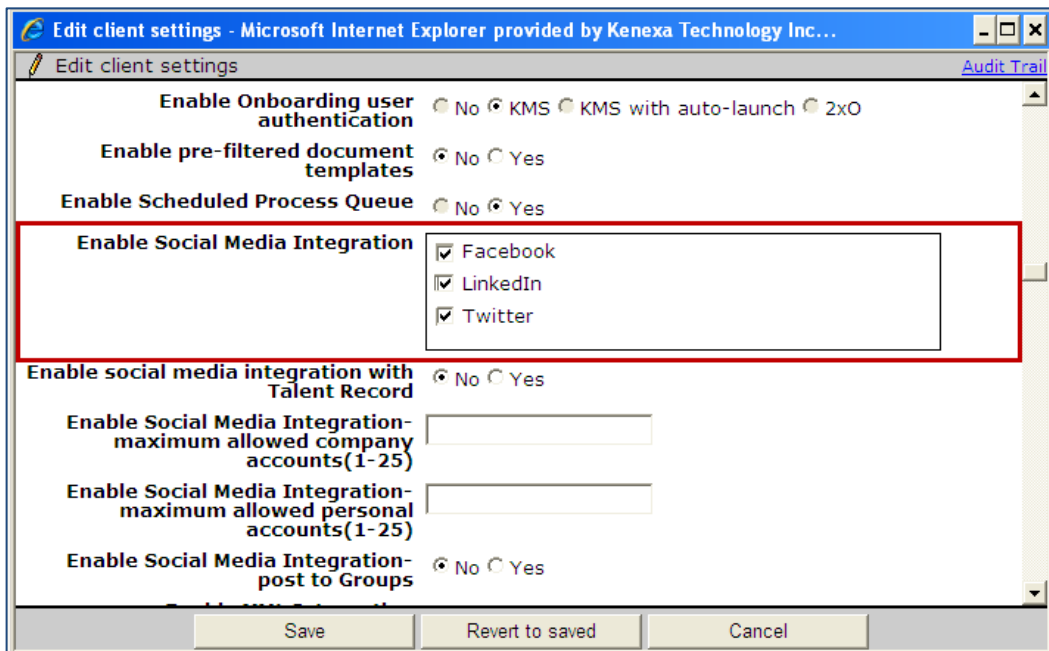
To configure this feature, you must enable the client setting for social media integration and the Talent Gateway social media integration settings.

Client Settings

In WB:

1. **Admin > Manage Clients > Edit Client Settings.**

The Edit Client settings dialog box displays.

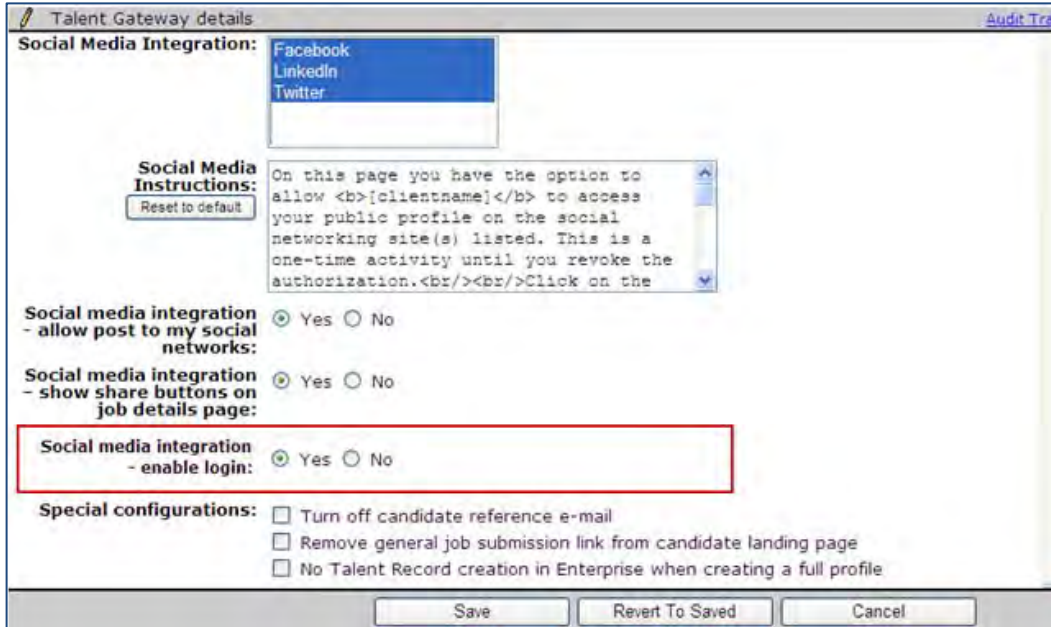


2. Select the checkbox for each social media site you want to enable for integration.
3. Click **Save**.

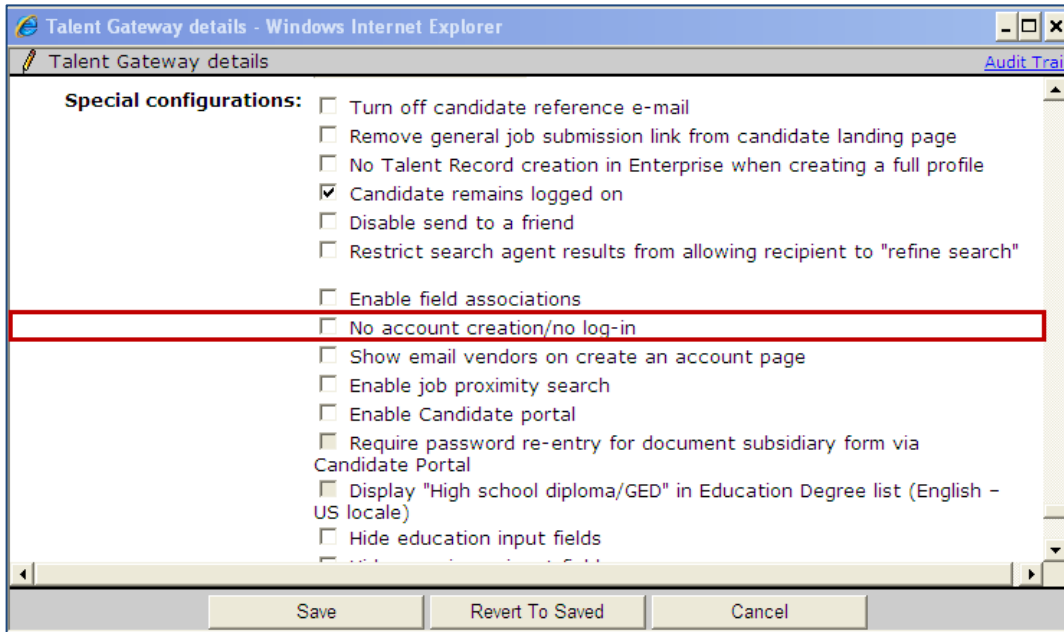
Talent Gateway Setting

In WB:

1. **Tools -> Talent Gateways -> Admin.**
Click the **edit** icon for your selected Gateway.
2. Select the **Yes** radio button for **Social Media Integration – Enable Login**.



3. Ensure that the **No Account creation/log-in Talent Gateway** setting is *unchecked*.



4. Click **Save**.

Social Media – Code Source Reporting for Candidates

Clients can now generate standard source code reports for candidates sourced from social media sites.

Product RDP639 Release 13.1	⌋ 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 2xB users to use mapped source code and social media sites to generate 2xB standard reports, Codes breakdown or Detail by filename, for the number of candidates sourced from social media sites. 2xB users can generate reports on candidates sourced from individual social media sites (one source code per social media site) OR on candidates from multiple social media sites together (one source code mapped to multiple social media sites). One source code can be mapped to multiple social media sites, but social media sites only have one source code.

The Codes breakdown 2xB standard report provides an overall view of all resumes/CVs in the system. The Detail by filename 2xB standard report provides detail load information per resume/CV file.

Once source codes are configured (mapped), 2xB users can generate standard code breakdown reports that display the number of candidates sourced from social media sites. Because social media sites can have only one source code mapped to it at a time, code breakdown reports either display individual source code/social media site associations OR multiple source code/social media associations.

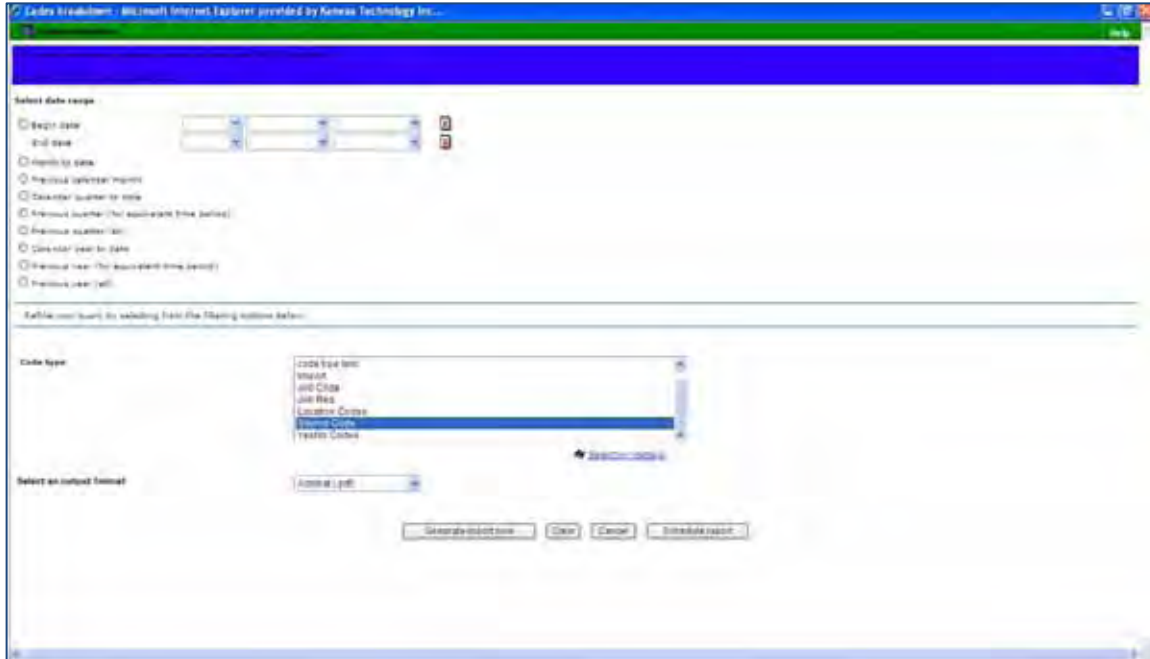
To change the type of source code mapping, from reporting on individual social media sites to reporting on combined social media sites, contact your Kenexa Support Team.

2xB User Experience

To generate **Codes breakdown** report:

1. Select **Reports > Standard Reports**.
2. Select **Codes breakdown** report.

The Codes Breakdown dialog box displays:



3. Select the Date range, the Source Code type, and Select an output format.
4. Click **Generate report now**. (The generated code breakdown report displays for *all* source codes. The following screenshots, however, display only the social media mapping portion of the code breakdown report.)

- When this feature is configured with a one-to-one relationship, one source code mapped to an individual social media site, generated codes breakdown reports display the number of candidates from an individual social media site.

Code	TDC paper	TDC e-mail	TDC full retypes	Web	Total codes
Total originals	0	0	0	2	2
Total duplicates	0	0	0	0	0
Total codes	0	0	0	2	2

- When this feature is configured with a one-to-many relationship, one source code mapped to more than one social media site, the standard codes breakdown report displays the number of candidates gathered from the combined social media sites as shown in the following report.

Code	TDC paper	TDC e-mail	TDC full retypes	Web	Total codes
Total originals	0	0	0	9	9
Total duplicates	0	0	0	0	0
Total codes	0	0	0	9	9

To generate **Detail by filename** report:

1. Select **Reports > Standard Reports.**
2. Select **Detail by filename** report.
3. Set any required options and click **Generate report now.**

The Detail by filename report lists detail load information for resumes/CVs, including social media source codes.

File Name	File Location	Label	Source	Status	Type	Origin	Job	TDC	Language	Source Code	Date Loaded	Status
BRG_DET_2791241_08121110	No	Original	Job		TDC North America	English (US)	FBsocial	1-Apr-2012	1	
BRG_DET_2791234_08121092	No	Original	Job		TDC World America	English (US)	FBsocial	1-Apr-2012	1	
BRG_DET_2791234_08121090	No	Original	Job		TDC North America	English (US)	LinkedIn	1-Apr-2012	1	
BRG_DET_2791228_08121084	No	Original	Job		TDC North America	English (US)	LinkedIn	1-Apr-2012	1	
BRG_DET_2791404_07202077	No	Original	Job		TDC North America	English (US)	...	1-Apr-2012	1	
BRG_DET_2791417_08121091	No	Original	Job		TDC North America	English (US)	...	1-Apr-2012	1	
BRG_DET_2791424_07121220	No	Original	Job		TDC North America	English (US)	...	1-Apr-2012	1	
BRG_DET_2791424_07121204	No	Original	Job		TDC North America	English (US)	...	1-Apr-2012	1	
BRG_DET_2791431_07121221	No	Original	Job		TDC North America	English (US)	...	1-Apr-2012	1	
BRG_DET_279153_07181880	No	Original	Job		TDC North America	English (US)	...	1-Apr-2012	1	
BRG_DET_2791461_08121091	No	Original	Job		TDC North America	English (US)	...	1-Apr-2012	1	
BRG_DET_2791431_08121097	No	Original	Job		TDC North America	English (US)	...	1-Apr-2012	1	
BRG_DET_2791416_08121091	No	Original	Job		TDC North America	English (US)	...	1-Apr-2012	1	
BRG_DET_2791433_07121221	No	Original	Job		TDC North America	English (US)	...	1-Apr-2012	1	
BRG_DET_2791471_08121091	No	Original	Job		TDC North America	English (US)	...	1-Apr-2012	1	

Limitations and Known Issues

Source codes must be disassociated (unmapped) before a 2xB user can deactivate the source code. The system does not allow deactivation of mapped source codes.

How Do Clients Get this Feature?

This feature is controlled by a client setting and source code and social media configuration in Workbench. Please contact your Kenexa Support Team for more information about enabling this feature.

Kenexa Tasks

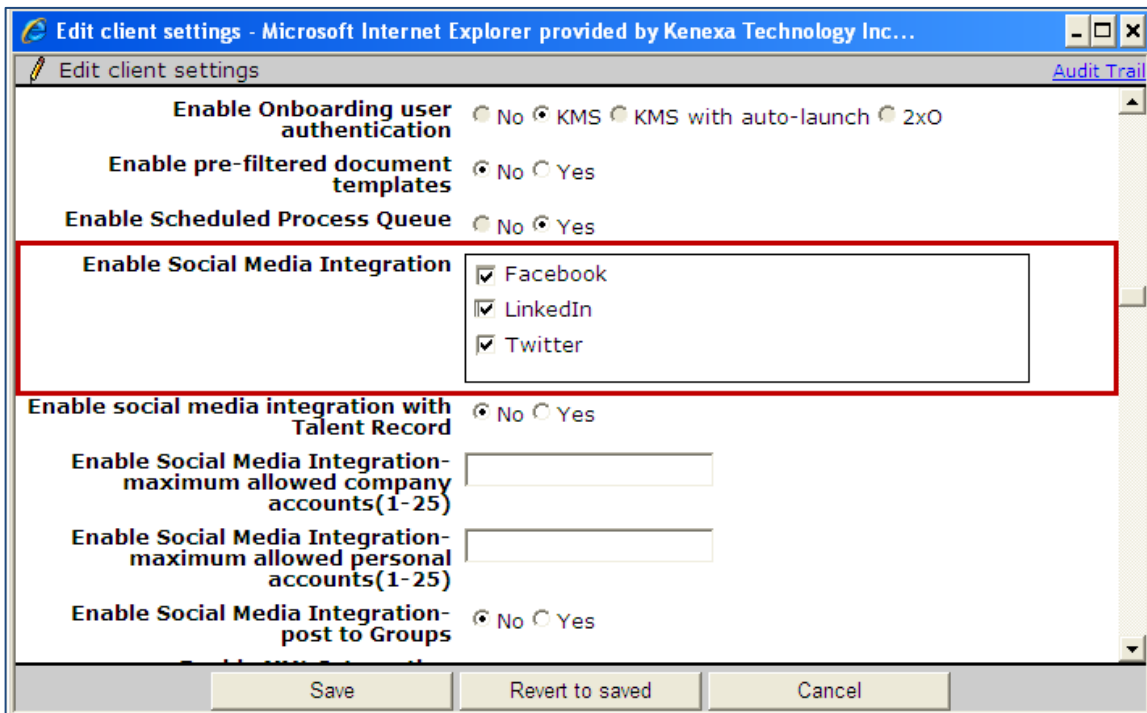
Workbench

This feature requires the Enable Social Media Integrations client setting for one or more social media sites, and the configuration of source codes and social media site mappings.

Client Setting

In WB:

Admin > Manage Clients > Edit Client Settings




Creating Source Codes

Use the following procedure to add the required number of source codes for report generation.

In WB:

1. **Tools > Settings > Code Types.**
2. Click **Add new code.**
The Add New Code Type dialog box displays.

3. On the Add New Code Type page, complete the required fields: Code type, Description, Label to Talent Gateway (language) candidates, and select the type of 2xB candidate search.

 **Note:** Use the description text box to note which social media sites you are mapping to when using this code.

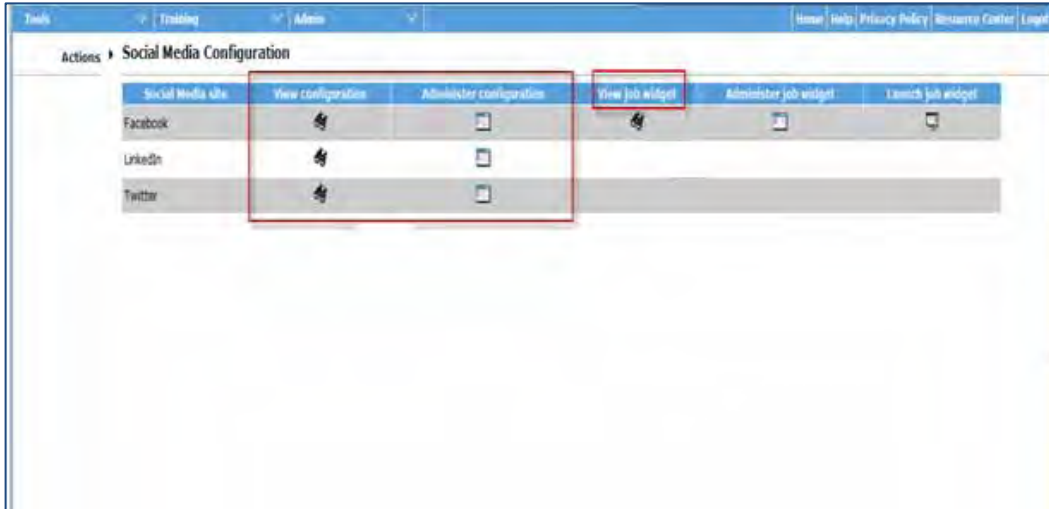
4. Click **Save**.

Source Code Configuration

Source code configuration maps source codes to social media sites. Depending on the report you want to generate, you can map each source code to one social media site, or map one source codes to multiple social media sites. Social media sites can only be mapped to one source code.


In WB:

1. **Tools > Settings > Social Media Configuration.**
The Social Media Configuration screen displays.

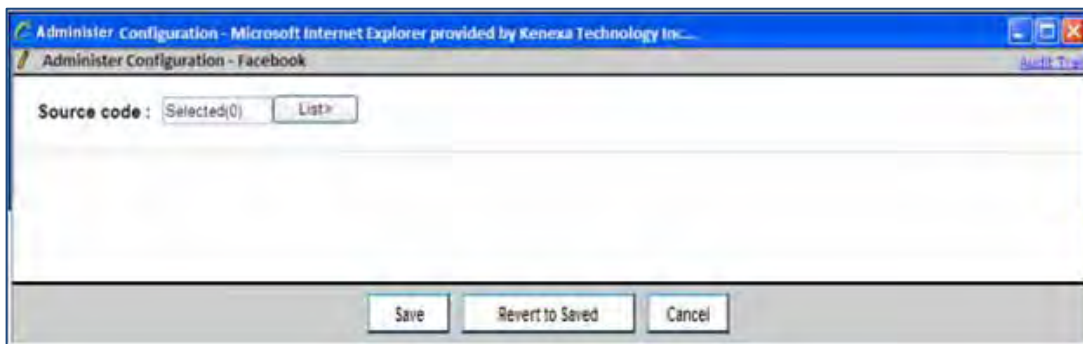


You can view the social media configuration for each social media site by clicking on the binoculars icon. Click **OK** to close the dialog box.



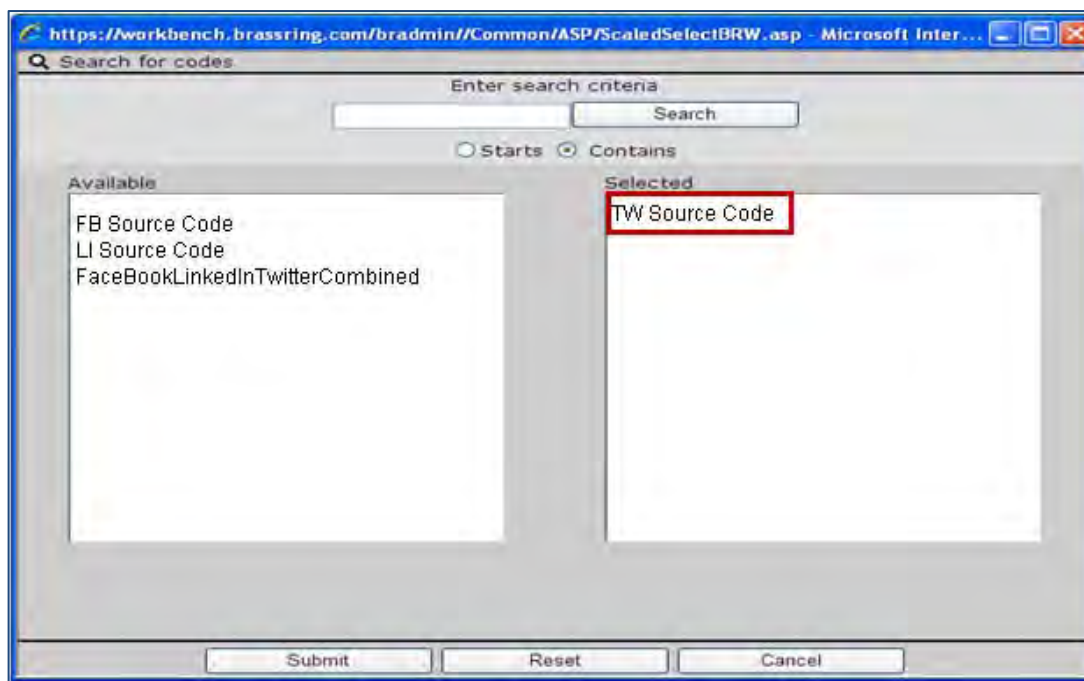
 **Note:** A social media site can be associated with only one source code but one source code can be mapped to multiple social media sites.

2. Click **Administer Configuration** icon for a social media site to associate a source code with the social media site.



3. Click **List** to view the Search Code dialog box. Users can search for source codes using the Search box or Select a source code from the Available list.

- (Optional) To un-map a social media site from a source code, Select the source code from the selected column and move it to the Available column.



- Click **Submit** to associate the selected source code with one or multiple social media sites.



Note: You can map one source code to multiple social media sites, but each social media site can only be mapped to one source code. For example, FB, LI, and TW can all be mapped to one source code, but each social media site can only be mapped to that one source code.

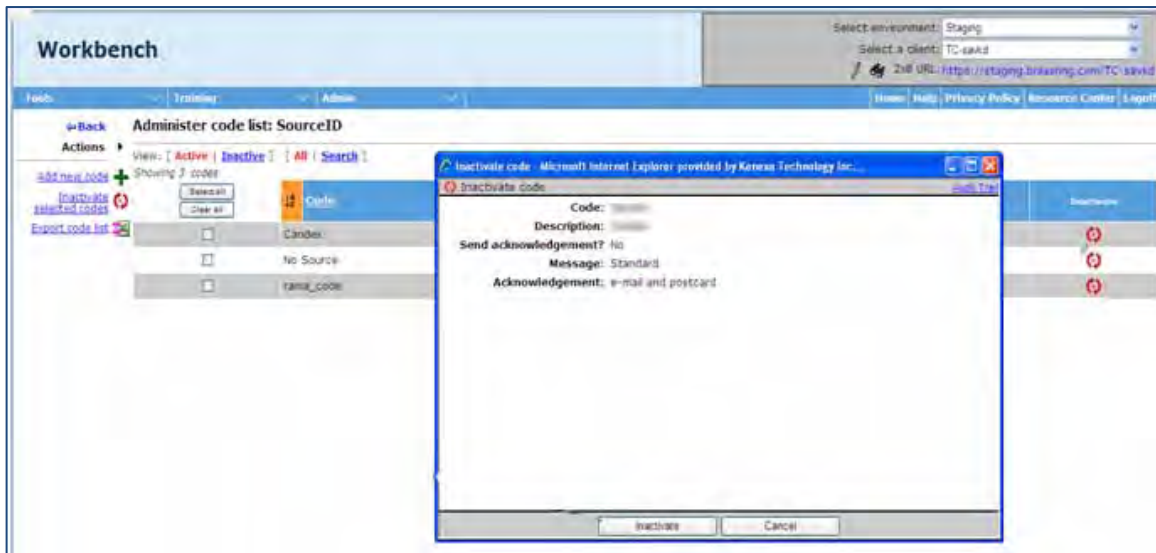
- Repeat Steps 2 through Step 4 to map source code/social media sites.
 - To generate standard reports displaying candidates from individual social media sites, associate one source code to each individual social media site.
 - Alternatively, to generate standard reports displaying candidates from all social media sites combined, associate one source code to multiple social media sites.
 - To change from one report type (single social media site) to another, the source code must be un-mapped and then Inactivated.
- Click **Save**.

Inactivating Source Codes

Source codes can be inactivated in WB. Before attempting to inactivate a source code, make sure the code has been un-mapped from its previous association.

In WB:

1. **Tools > Settings > Code Types.**
2. Select **Administer Code List** icon. .
The Administer code list page displays:



3. Click **Inactivate** icon.
The inactivate code screen displays.
4. Click **Inactivate**.

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 Re1 13.0 Updated Re1 13.1	↳ 2x BrassRing ↳ Talent Gateways	↳ Workbench Self-Service ↳ Social Media
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

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.

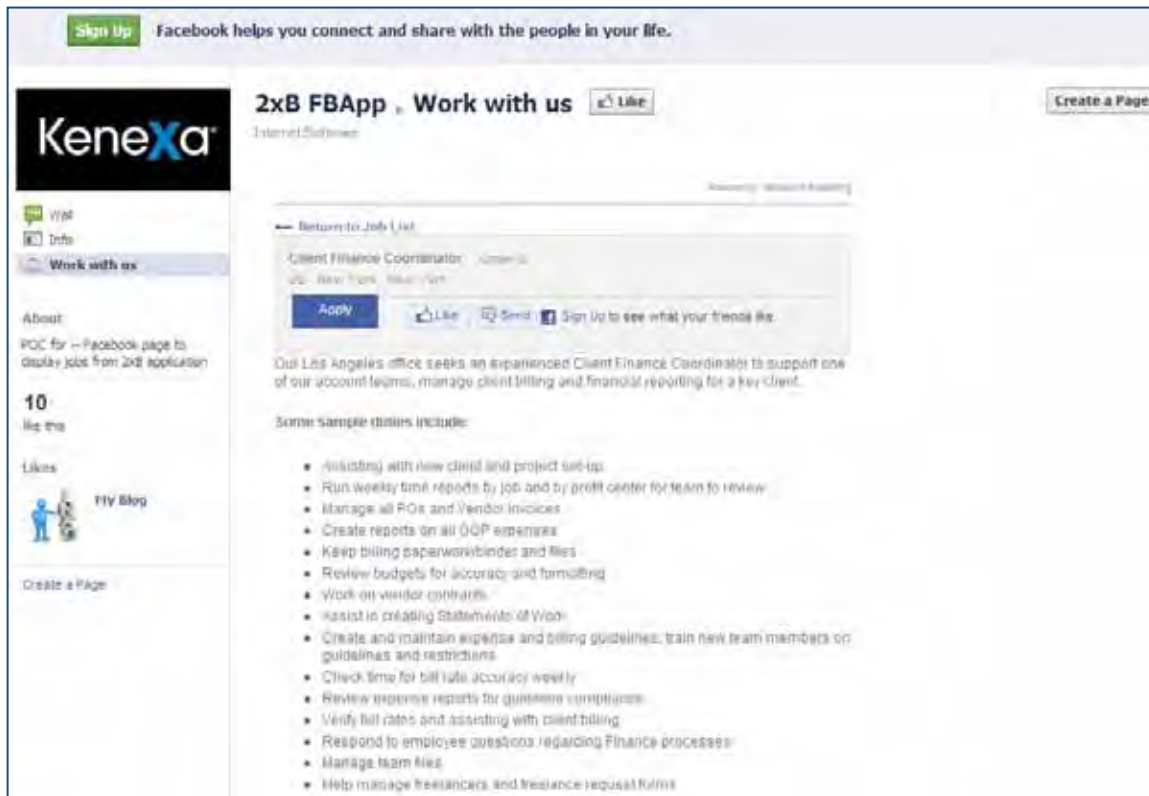
- You configure a Facebook app for placement on company pages
- Job seekers can search for jobs by four different categories, and view job description without leaving Facebook.
- The application process can be initiated from Facebook , and 2xB will track the candidate source as coming from the Facebook 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.

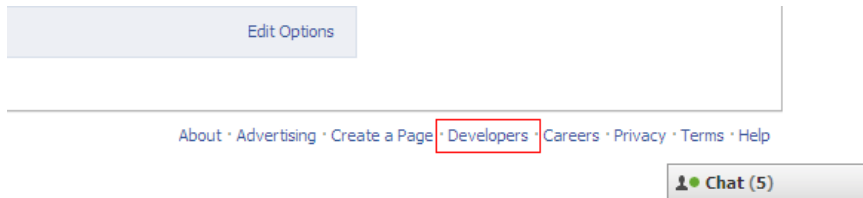
In addition, you must create a Facebook app for the display of the job listings and details. See the next section for general information.

Creating a Facebook App – Updated for Release 13.1

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.

1. Click “**Developers**” found at the bottom of your Facebook home page. This takes you to FB’s developers page.



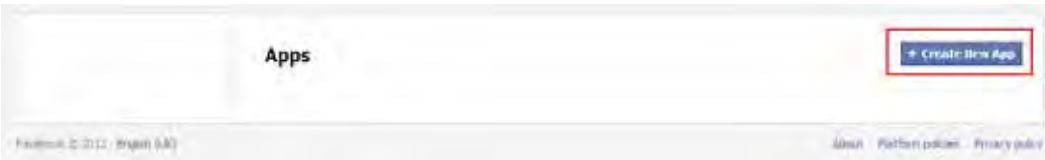
2. Click the “**Build apps on Facebook**” link on the FB developers page.



3. Allow Facebook Developer to access your basic information by clicking **Allow**:



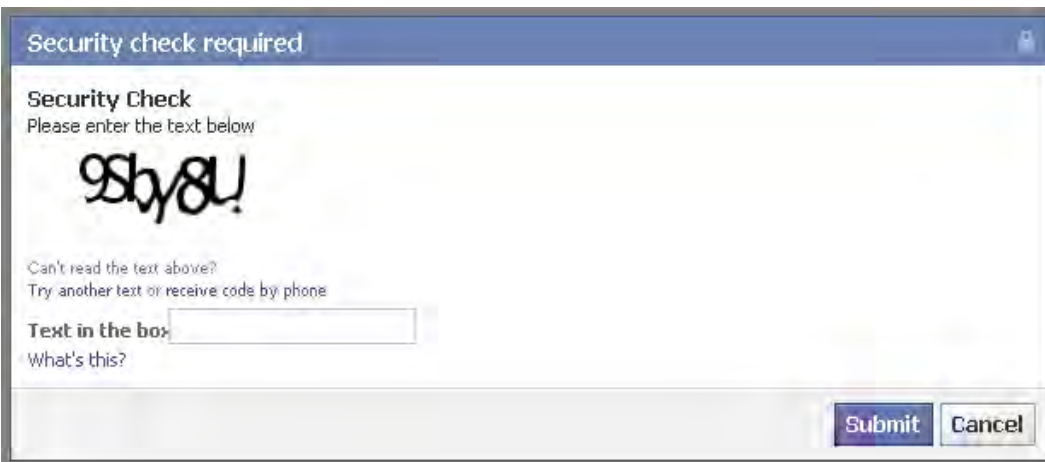
4. Click “+ Create New App.”



5. Enter the App Display Name and App Namespace of your choice. Please ensure that you agree to the Facebook Platform Policies by ticking the box and then click **Continue** to create the app.




6. Enter the text that appears for security check, and click “**Submit.**”



7. Check the details of your app and then expand the sections **App on Facebook** and **Page Tab**.

Apps ▶ **Test Site** ▶ **Basic**



Test Site
App ID: 186788811420558
App Secret: 06ca7ea03e1177ddf29172be7720ba8e (reset)
[\(edit icon\)](#)

Basic info

App Display Name: [?]

App Namespace: [?]

Contact Email: [?]

App Domain: [?]

Category: [?]

Select how your app integrates with Facebook

<input checked="" type="checkbox"/>	Website	Log in to my website using Facebook.
<input checked="" type="checkbox"/>	App on Facebook	Use my app inside Facebook.com.
<input checked="" type="checkbox"/>	Mobile Web	Bookmark my web app on Facebook mobile.
<input checked="" type="checkbox"/>	Native iOS App	Publish from my iOS app to Facebook.
<input checked="" type="checkbox"/>	Native Android App	Publish from my Android app to Facebook.
<input checked="" type="checkbox"/>	Page Tab	Build a custom tab for Facebook Pages.

8. Enter the Job Widget URL obtained from Workbench in following fields:

- Canvas URL
- Secure Canvas URL (use “https”)
- Page Tab URL
- Secure Page Tab URL (use “https”)

Enter a name in the Page Tab Name field.

You can upload your company’s logo or a relevant image in the Page Tab Image section.

Select how your app integrates with Facebook

App on Facebook ✕

Canvas URL: [?]

Secure Canvas URL: [?]


Page Tab ✕

Page Tab Name: [?]

Page Tab URL: [?]

Secure Page Tab URL: [?]

Page Tab Edit URL: [?]

Page Tab Image:  Change

Page Tab Width: [?] Narrow (520px) Wide (810px)

Website with Facebook Login Log in to my website using Facebook.

Mobile Web Bookmark my web app on Facebook mobile.

Native iOS App Publish from my iOS app to Facebook.

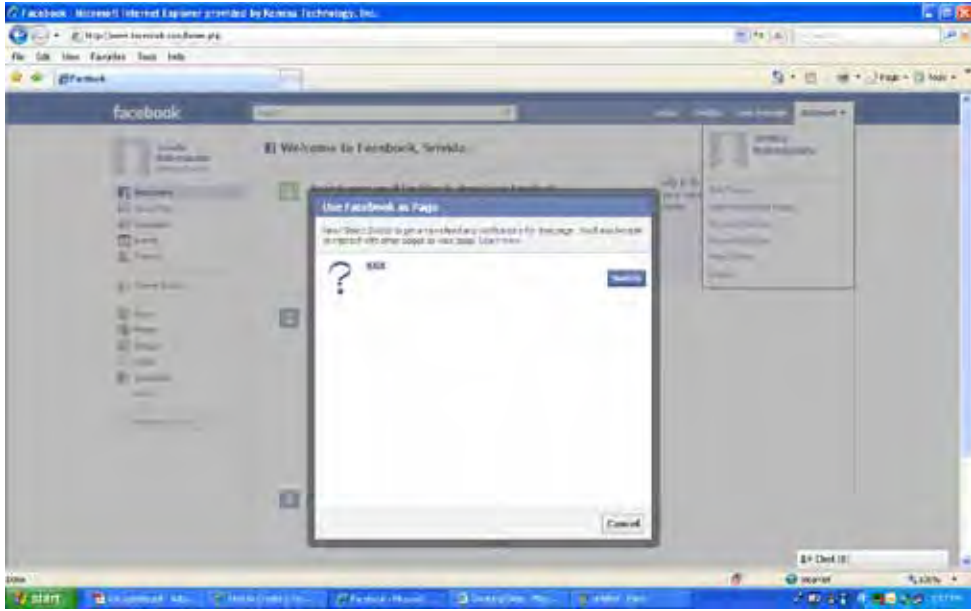
Native Android App Publish from my Android app to Facebook.

9. Click **Save Changes**, then add the Facebook app to your Facebook page.

To add the Facebook app to your Facebook page:

1. Visit the URL:
[https://www.facebook.com/dialog/pagetag?app_id=\[app_id\]&next=\[Page_Tab_URL\]](https://www.facebook.com/dialog/pagetag?app_id=[app_id]&next=[Page_Tab_URL])
2. Replace [app_id] with the the actual app id eg: 460742400611836 and [Page_Tab_URL] with the Talent Gateway URL that you entered in the Page Tab URL field.
3. If you have multiple pages, select the Page to which you want to add this app.

Any visitor to your company page will see a new Tab with the Page Tab Image you have uploaded and upon clicking this tab, the TG login screen is launched in the Facebook window.

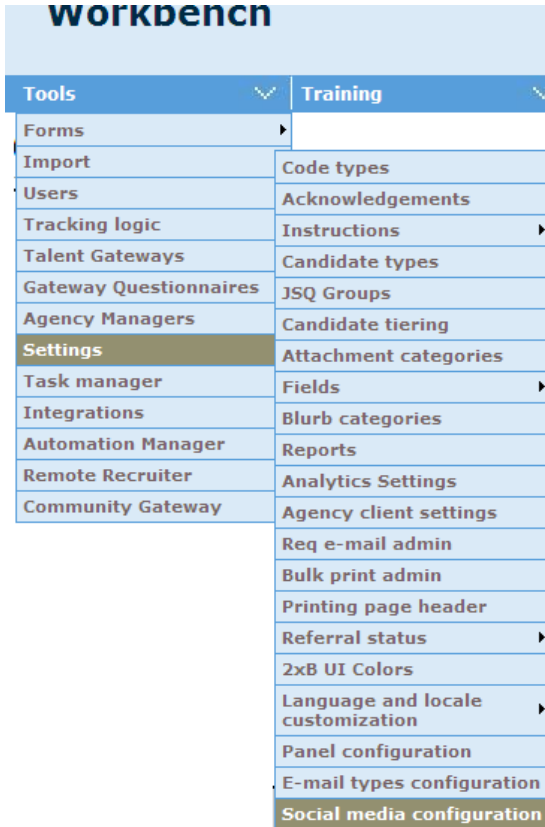


Kenexa Tasks

Workbench – Updated for Release 13.1

Creating the 2xBrassRing Facebook Widget URL

1. In Workbench, go to: **Tools > Settings > Social Media Configuration**



2. Click the Administer job widget icon for Facebook:



3. In the Administer job widget window, set the parameters of your Facebook widget:

Administer job widget

Enable Job widget configuration: Yes No

Select Talent Gateway to pull jobs from:

Available Talent Gateways:	Selected Talent Gateways:
External - English - EN	
Extamal - German - DE	

Job widget default display language:

Select filters:

Available fields:	Selected fields:

Select output fields:

Available fields:	Selected fields:

Enable keyword search: Yes No

Number of jobs to be displayed in a page:

Apply button redirects:

Talent gateway login page (for the particular req)

Job details page

Save Revert to saved Cancel

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).

4. Click **Save**.

5. 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.


Social Media – Posting History

This feature allows 2xB users to view a posting history of requisitions posted to social networks. When configured, 2xB users can click a hyperlink on the Post to My Social Network page to display the posting history for that user and that particular requisition.

Product	⌘ 2x BrassRing	⌘ Workbench Self-Service
Release 13.1 RDP602		⌘ Talent Gateways
Visible Changes	⌘ Yes – details in <i>Visible Changes</i> 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 feature allows 2xB users to view a posting history of requisitions posted to social networks. When configured, 2xB users click a View Social Media Posting History hyperlink on the Post to My Social Network page to display the posting history. The initial view is for their own posting history with the current requisition. Users click “All My Postings” to display all of their social media requisition postings.

In addition, if the requisition being posted has previously been posted, a new tick mark icon  displays next to the requisition on the Post to My Social Networks page.

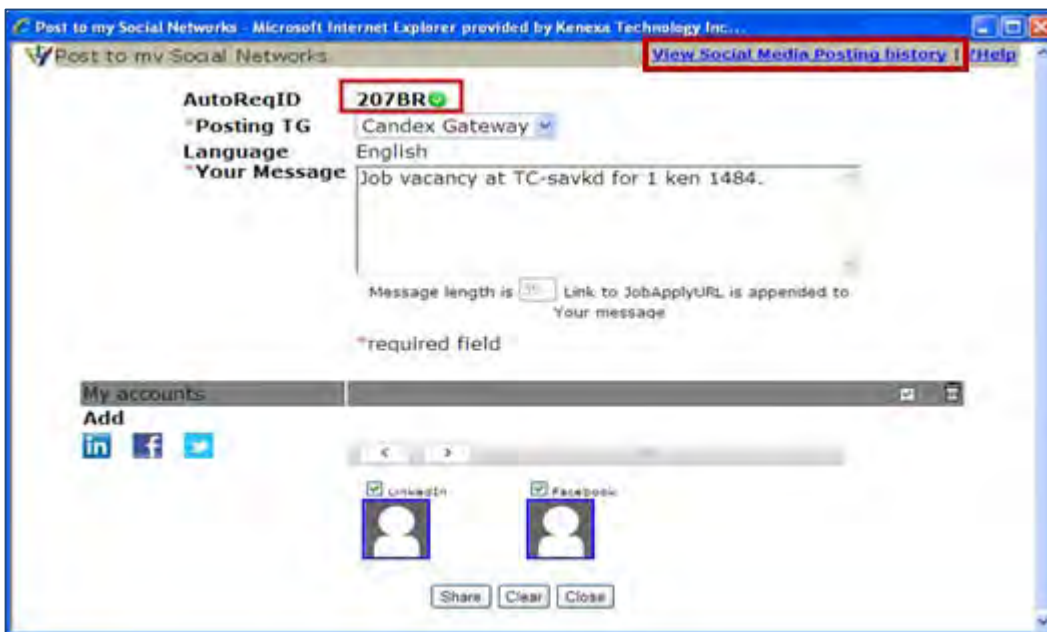


Note: Social media posting history displays in accordance with a user's privileges. For example, if a user does not have a privilege to post to a corporate account, corporate accounts will not display in the posting history.

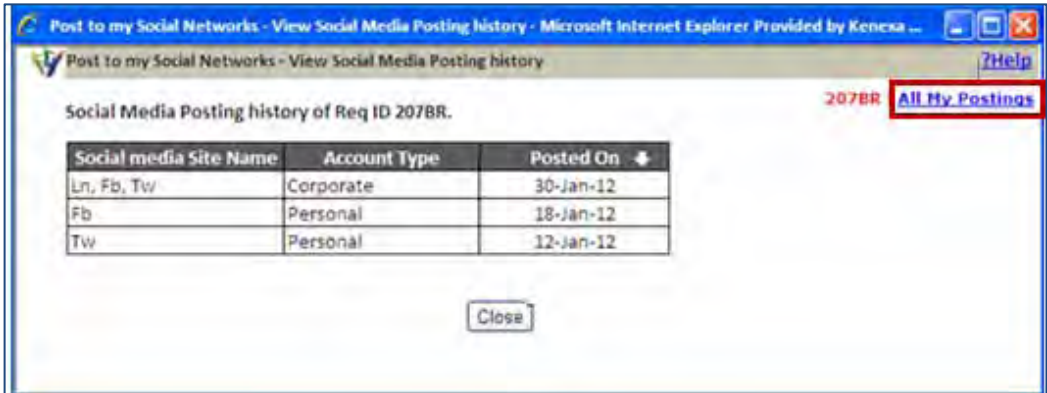
2xB User Experience

View Social Media Posting History

When you click the Post to My Social Networks posting option, a tick mark next to the requisition indicates that the req has previously been posted. A hyperlink to View Social Media Posting history also displays on the posting screen. A



Click View Social Media Posting History to view your posting history for the current requisition. The posting history grid includes the social media site name, the account type, and the date the requisition posted. The Posted On column is sortable.

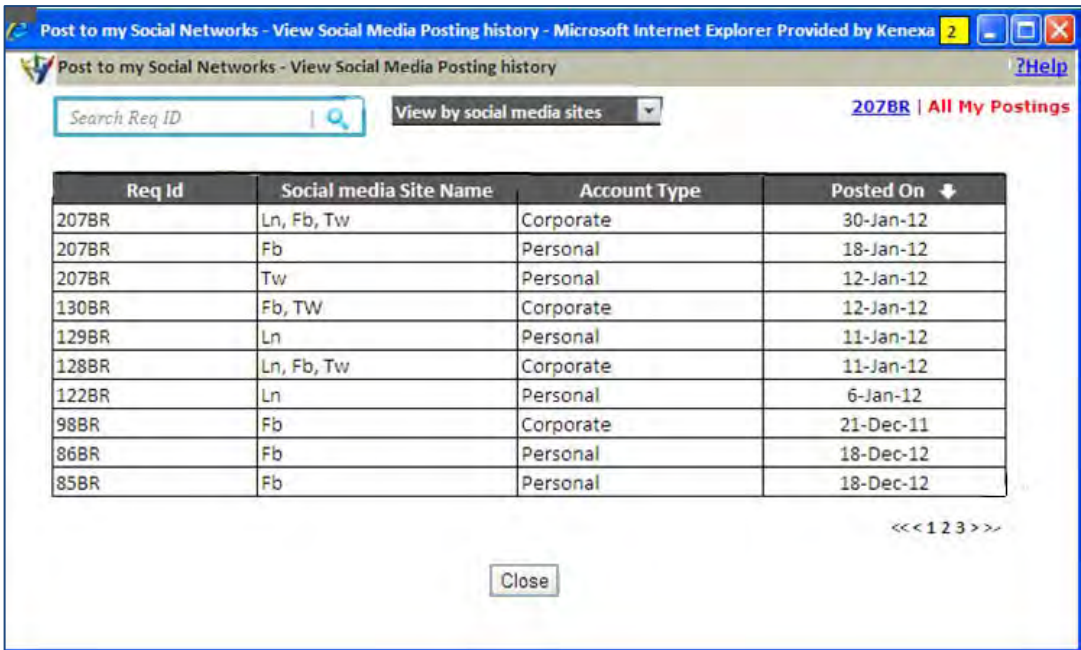


Click the All My Postings to view *all* of your requisition postings to social media sites. The All My Postings history display lists the social media posting history in a grid format, including:

- Display of ten reqs per page
- Search box (Req ID or text search criteria)
- Drop-down filter list box (filter per social media site)
- Req ID hyperlink to view req details
- Sortable Posted On column

Detailed Requisition Posting History includes:

- social media site name abbreviation
- account type
- date the requisition posted



Click **Close** to close the social media posting history.

How Do Clients Get this Feature?

This feature is controlled by four social media client settings:

Social media integration client settings must be enabled

- Social media integration – enable for social media sites
- Social media integration – maximum allowed company accounts (1-25)
- Social media integration – maximum allowed personal accounts (1-25)
- Social media integration – post to groups

In addition, Workbench self-service users must enable user privileges for this social media functionality. Please contact your Kenexa Support Team or certified Workbench Self-Service user for more information about enabling this feature.

Workbench Self-Service Certified Users

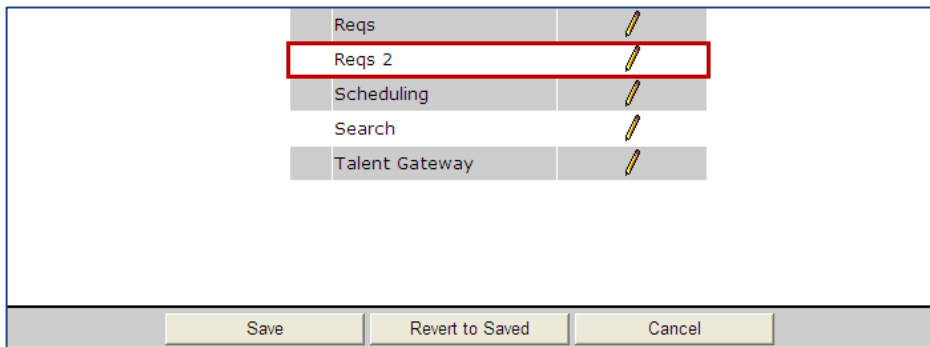
To access all of the social media posting views, these four user privileges must be enabled for the social media referral functionality:

- **Social Networks – Post to my accounts**
This privilege allows users to post and view their own social media accounts.
- **Social Networks – Post to groups**
This privilege allows users to post and view their own social media groups.
- **Social Networks – Authorize company accounts**
This privilege allows users to access and view social media posting history
- **Social Networks – Post to company accounts**
This privileges allows users to post and view to company accounts

In WB:

1. **Tools > Users > User Types > Edit type permissions [for selected user type] > Reqs 2.**

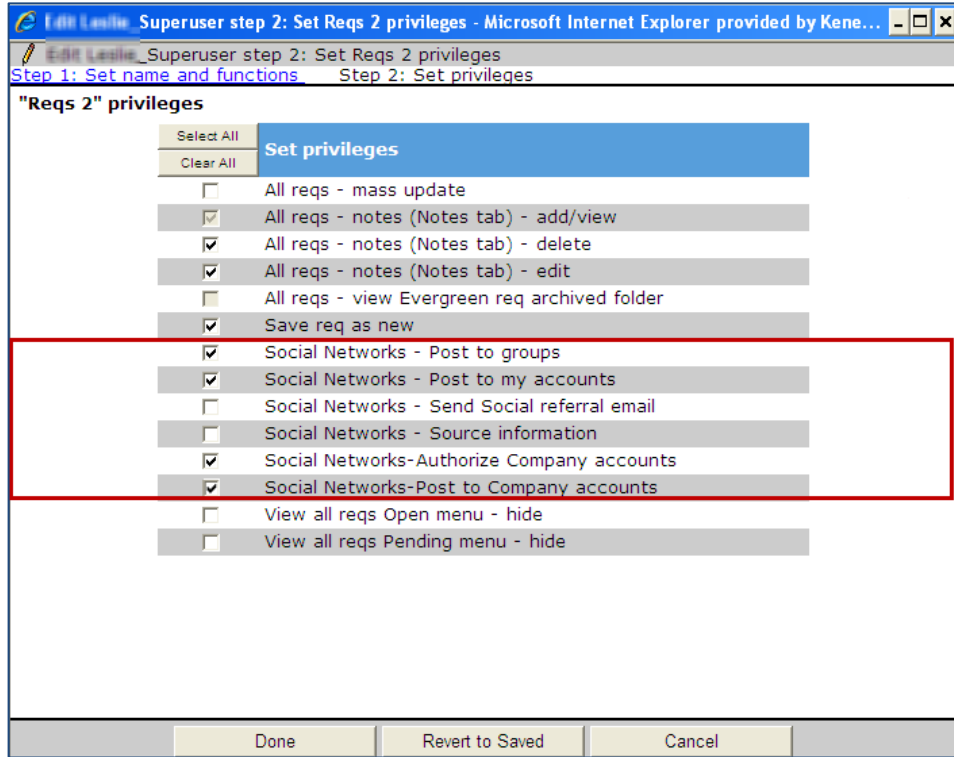
The Set Name and Function dialog box displays.



Click the **Edit** icon for Reqs 2.

The Req 2 Set Privilege screen displays.

2. Select the checkbox for each of the Social Network privileges as shown in the screenshot.



3. Click **Done**.
4. Click **Save**.

Kenexa Tasks

Workbench

This feature requires four social media client settings. in addition to enabling social media integration.

- Enable Social Media Integration
- Maximum allowed company accounts (1-25)
- Maximum allowed personal accounts (1-25)
- Post to groups

In WB:

1. **Admin > Manage Clients > Edit Client Settings.**

The Edit Client settings dialog box displays.

Enable Scheduled Process Queue No Yes

Enable Social Media Integration

- Facebook
- LinkedIn
- Twitter

Enable social media integration with Talent Record No Yes

Enable Social Media Integration-maximum allowed company accounts(1-25)

Enable Social Media Integration-maximum allowed personal accounts(1-25)

Enable Social Media Integration-post to Groups No Yes

Enable XML Integration confirmation No Yes

Enable YUI editor No Yes

Encoding of Candidate Emails

Save Revert to saved Cancel

2. In the three **Enable Social Media Integration** section, select the checkbox for each social media site.

3. In the next 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.

4. Click **Save**.

System Support – Browsers and Languages

Browser/OS Support

Whenever you need the most up-to-date information on supported platforms and browsers, see the Browser/OS Support document on the User Resource Center. For your convenience, the information current as of the 13.1 release in May 2012 is included in this document – “*Kenexa 2x BrassRing Supported Browsers*” PDF file.

Language Support

As of Release 13.1, 2x BrassRing has an Arabic language interface available.

New Talent Gateway languages include:

- Arabic (Requires WCAG TG)
- Hebrew (Requires WCAG TG)
- Romanian (Project RDP615)

For additional information on the Arabic and Hebrew language support (Project LDP073), please see *Right-to-Left Language Support Functionality Exclusions*, included in this document.

Whenever you need the most up-to-date list of supported languages, see the Language Support document on the User Resource Center. For your convenience, the information current as of the 13.1 release in May 2012 is included in this document – “*Kenexa 2x BrassRing Supported Languages*” PDF file.

Support for resume extraction in the following languages was also added in Release 13.1 (Project RDP563b):

- French Canadian
- Traditional Chinese

Talent Gateways – Candidate Portal Enhancement


This feature introduces enhancements to the candidate portal setting for “Candidate Portal - Password for Non Talent Gateway (TG) applicants.” Before this enhancement, candidates using home phone, work phone, other phone, or zip code as a password field could experience login failures if these fields contained any alpha characters.

Product	↳ 2x BrassRing	↳ Talent Gateways
Release 13.1 RDP632		
Visible Changes	↳ Yes – details in <i>Visible Changes</i> document sent for each release build.	
How do I get this feature?	↳ Automatic – see details below..	

Feature Description

This change affects clients using a Candidate Portal with the client setting “Candidate Portal - Password for Non TG applicants” configured. The client setting for a candidate’s password could be configured to use a Home phone, Work phone, Other phone, or Zip code field.

Before this enhancement, 2xB only recognized numeric characters as valid for any of these fields. 2xB can now recognize both numeric and alpha characters as valid in this password field. This new functionality provides a much higher likelihood of candidates’ successful initial login to the Talent Gateway.

 This feature is available for both WCAG TGs and non-WCAG TGs.

Password Verification

When the candidate selects a password field, the system now:

1. Takes the value stored in the corresponding Talent Record field.
2. Strips out the following characters: () [] , ‘ “ - _ + = . < > space | \ / * & ^ % \$ # @ ! ~ ` ? ; ; { }
3. Leave the following characters: Unicode characters, 1 2 3 4 5 6 7 8 9 0 A B C D E F G H I J K I M N O P Q R S T U V W X Y Z a b c d e f g h i j k l m n o p q r s t u v w x y z
4. Uses this value as the temporary initial password for the newly created Talent Gateway Profile.

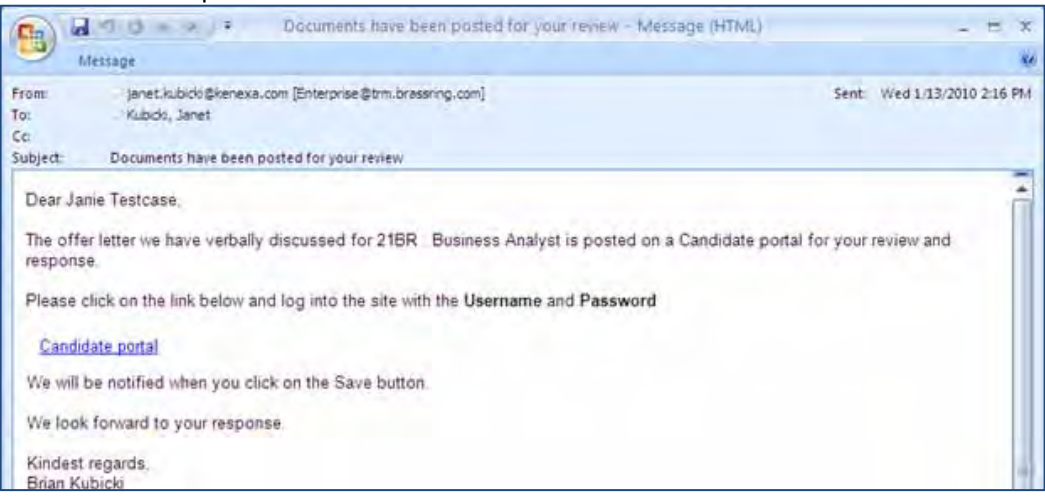
When validating passwords, the system now:

1. Takes the value entered in the password field on the Talent Gateway login
2. Strips out the following characters: () [] , ‘ “ - _ + = . < > space | \ / * & ^ % \$ # @ ! ~ ` ? ; ; { }
3. Leave the following characters: Unicode characters, 1 2 3 4 5 6 7 8 9 0 A B C D E F G H I J K I M N O P Q R S T U V W X Y Z a b c d e f g h i j k l m n o p q r s t u v w x y z. Alpha characters will NOT be case sensitive. If the candidate puts in either an ‘A’ or an ‘a’ the password will match if the letter is correct.
4. Compares this value against the stored value.
5. Grants Talent Gateway profile access to the candidate if the values match.

Candidate Experience

The following scenario outlines the candidate experience when logging into the Candidate portal for applicants without TG profiles.

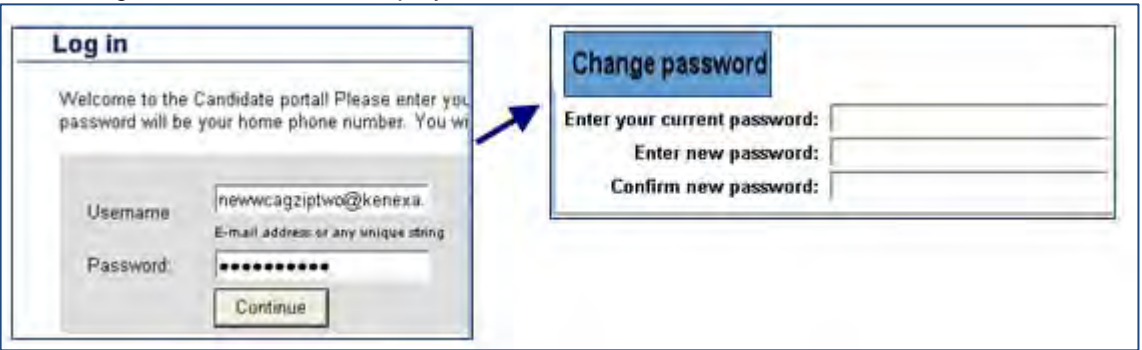
1. The recruiter uses Send communication action to send the candidate an email with the link to the TG profile on the candidate portal.




2. Candidate clicks the eLink. TG login page displays with customized text instructing user to use their email and home phone (numbers only) as their username and password.



3. Candidate completes Username and Password fields following login instructions. Usernames are case-Insensitive.
4. Candidate clicks **Continue**. The Change Password screen displays.



 Candidate entered passwords are NOT case sensitive.

5. Candidate changes password and clicks **Submit**. Candidate portal page displays and candidate can select and view the document.



6. Candidate clicks **Log out** after reviewing document.

Best Practice Recommendations

It is recommended that the username options of **first name** and **last name** *be removed from selections during configuration*. These options do not provide unique usernames.

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, and email address.

How Do Clients Get this Feature?

This feature is available automatically without configuration for Candidate Portal clients with the .client setting "Password for Non TG Applicants" configured.

2x BrassRing – Web Service API Enhancements

The following features list outlines new features added to the 2x BrassRing Application Programming Interface (API) web service for Release 13.1. These features are also included in the *2xB API Reference – Candidate-Specific APIs and Web Service API*.

Product	↳ 2x BrassRing	↳ Talent Gateways
Release 13.1 RDPs 604 and 584	↳ Workbench Self-Service	
Visible Changes	↳ No – requires specific conditions / configuration for visibility.	
How do I get this feature?	↳ Please refer to each individual feature for configuration details. Contact your Kenexa Support Team for implementation details.	

Feature Description

The API features introduced in Release 13.1 are briefly described in this document. For full details and configuration instructions, please refer to the guide, *2xB API Reference – Candidate-Specific APIs and Web Service API*, available from your Kenexa Support Team.

[Search API Additions](#)

This feature enhancement introduces new search parameters for Job Search API requests.

[Authenticate Quick Links](#)

This feature enhancement allows 2xB users to configure authenticated Quick Links in 2xB for quick access to external systems.

Features List

The following list gives a brief overview of the API enhancements introduced in Release in 13.1. Each new feature requires specific configuration. Please contact your Kenexa Support Team for more information about enabling these features.

Search API Additions

The following new parameters (search fields) can be sent in a search API request. The return format for each request can be EXTensible Markup Language (XML) or Really Simple Syndication (RSS).

The following new parameters can now be included in a job search API request:

- IncludeAllRecruiterInfo
- IncludeAllHiringManagerInfo
- IncludeReqSubForms

Each of these new parameters returns a particular set of attributes (fields). All of the attributes are be included in separate nodes.



Each job search API request returns a maximum of 50 records when any one of the three fields is used in the request.

IncludeAllRecruiterData

In addition to returning the **current recruiter** name, the parameter IncludeAllRecruiterInfo returns the following recruiter information when the value is set to **Yes**:

- Recruiter system ID
- Recruiter email address
- Recruiter Employee ID

IncludeAllHiringManagerInfo

In addition to returning the current **hiring manager** name, the parameter IncludeAllHiringManagerInfo returns the following hiring manager information when the value is set to **Yes**:

- Hiring Manager system ID
- Hiring Manager email address
- Hiring Manager Employee ID

IncludeReqSubForms

For each **form type ID** sent in the request, the associated fields for that form are returned (within each req being exported). If more than one instance of the form is available (meaning it is a multiple per req form) each instance of the req sub form is included. For req sub form requests, they are returned in the locale of the req. The following fields are returned.

- Form type ID
- Form db name
- Form title
- List of fields with their values included
 - Field QID
 - Field DB field name
 - Field Description
 - Field value (both code and description for options lists)



All of these attributes are included in separate nodes.

How Do Clients Get this Feature?

This feature requires Web Service Search API configuration. Please contact your Kenexa Support Team for more information about enabling this feature.

Refer to the *API Candidate-Specific and Web Service APIs* guide for full configuration information.

Authenticated Quick Links

Quick link authentication allows 2xB users to quickly access external systems via an authenticated Quick Link. When configured, the Quick Link panel displays the configured Quick Links in 2xB. Users can click the Quick Links (hyperlinks) and be directly connected to the external systems.



How Do Clients Get this Feature?

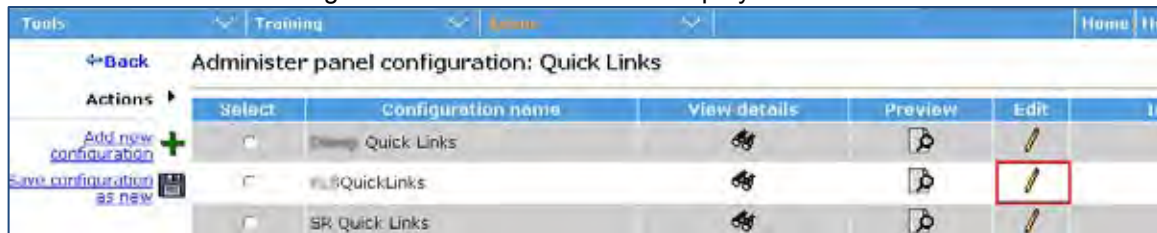
This feature requires the configuration of a Pass Through type host and a Quick Link. Please contact your Kenexa Support Team for host configuration and more information. Once a host is configured, Workbench Self Service Users can configure the Quick Link.

Workbench Self-Service Certified Users

When the host is configured, WBSS users can configure the Quick Link.

Configuring Quick Links

1. **Tools > Settings > Panel configuration.**
The Panel configuration screen displays.
2. Click **Quick Links Administer configurations** icon.
The Administer Panel configuration: Quick Links screen displays.



3. Click the **edit** icon for your selected Quick Link.
The edit panel screen displays.
4. Select the radio buttons for **External Link** and the **Select host** type. Click the **Select host type** drop-down list box to select an active host with the type of Pass-Through.
5. Enter name of Quick Link in the text box. This text represents the Quick Link in 2xB.

Edit panel configuration

*Configuration name:

Panel title: [English (US)]

Allow users to add/remove links and categories

Select type: Quick Link Category Custom Category External Link

URL:

Select host:

Text:

Configured panel contents

#	Actions	Type	Contents	
1		External Link	Analytics Demo [https://staging.brassring.com/KRBanalytics/SH02.aspx]	<input type="button" value="View/Edit translations"/>

6. Click **Add**.
The Quick Link Panel configuration displays at the bottom of the screen.

Configured panel contents

#	Actions	Type	Contents	
1		External Link	HireRight [Host: HireRight Dashboard]	<input type="button" value="View/Edit translations"/>



Quick links must be disabled on hosts before the host can be inactivated.

7. Click **View/Edit Translations** to view quick link panel configuration details.

View panel configuration [Audit Trail](#)

User type(s) : RecruiterNewUI

Configuration name : Testing

Allow users to add/remove links and categories : Yes

Panel title : Quick Links [English (US)]

Row #	Type	Contents (English (US))
1	External Link	HireRight [HireRight Dashboard]

8. Click **Close**.

Kenexa

This section contains:

- Workbench: Configuration of a pass through host
- Sample XML code for an API request and an API response

Workbench

This feature requires the configuration of a Pass Through type host that can then be selected for quick link configuration.

Configuring the Pass Through Host:

1. **Tools -> Integrations -> Manage hosts -> Add/Edit host.**

The add/edit dialog box displays.

The screenshot shows a web browser window titled "Add host - Microsoft Internet Explorer provided by Kenexa Technology Inc...". The main content area is a form titled "Add host". At the top right of the form is a checkbox labeled "Hide system-generated error message from users". Below it is a section for "Custom error text" with a text area and a language dropdown menu set to "[English - United States]". The form contains several text input fields: "Default posting URL:", "Account name:", "User name:", "Password:", "Information link URL: (export only)", "Service URL:", and "Target URL:". A dropdown menu for "Type:" is highlighted with a red box and shows "Standard Pass-through" selected. Below this is a "Host/Vendor Code:" text input field. At the bottom of the form are two checkboxes: "Include req information" and "Include candidate information". At the very bottom of the dialog box are three buttons: "Save", "Clear", and "Cancel".

2. Complete all host fields (web service parameters):

- Account Name (client account ID from external system)
- User Name (for web service)
- Password (for web service)
- Service URL (for web service)
- Type (use Standard Pass-through)
- Vendor Code (use a common vendor ID)

Include req/candidate checkboxes

- When checked, sends standard req/candidate fields to external system

3. Click **Save**.

Sample XML Code

The following are XML format examples for an API request and an API response.

API Request

```
<?xml version="1.0" encoding="utf-8" ?>
- <Envelope version="01.00">
- <Sender>
  <Id>000012</Id>
  <Credential>516</Credential>
</Sender>
- <TransactInfo transactType="data" transactId="4061ed9a-72e0-414d-9004-8743966eb2fc">
  <TransactId>4/25/2012</TransactId>
  <TimeStamp>12:00:00 AM</TimeStamp>
</TransactInfo>
- <Unit UnitProcessor="SearchAPI">
- <Packet>
- <PacketInfo packetType="data">
  <packetId>1</packetId>
</PacketInfo>
- <Payload>
- <InputString>
  <ClientId>516</ClientId>
  <SiteId>8923</SiteId>
  <PageNumber>1</PageNumber>
  <OutputXMLFormat>0</OutputXMLFormat>
  <AuthenticationToken />
  <HotJobs />
  <JobDescription>NO</JobDescription>
  <IncludeAllRecruiterInfo>Yes</IncludeAllRecruiterInfo>
  <IncludeAllHiringManagerInfo>Yes</IncludeAllHiringManagerInfo>
  <IncludeReqSubForms>2743,2749</IncludeReqSubForms>
- <ProximitySearch>
  <Distance />
```

```

<Measurement />
<Country />
<State />
<City />
<zipCode />
</ProximitySearch>
<JobMatchCriteriaText />
<SelectedSearchLocaleId />
- <Questions>
- <Question Sort="No" Sortorder="ASC">
  <Id>990</Id>
- <Value>
- <![CDATA[ TG_SEARCH_ALL
]]>
</Value>
</Question>
</Questions>
</InputString>
</Payload>
</Packet>
</Unit>
</Envelope>

```

API Response

```

<?xml version="1.0" encoding="utf-8" ?>
- <Envelope version="01.00">
+ <Sender>
- <TransactInfo transactType="response" transactId="9a5e5444-369d-4905-a605-a64bf5f09577">
  <TransactId>4/25/2012</TransactId>
  <TimeStamp>12:00:00 AM</TimeStamp>
</TransactInfo>
- <Unit UnitProcessor="SearchAPI">
- <Packet>
- <PacketInfo packetType="data" encrypted="no">
  <packetId>1</packetId>
</PacketInfo>

```

```

- <Payload>
- <InputString>
  <ClientId>516</ClientId>
  <SiteId>8923</SiteId>
  <PageNumber>1</PageNumber>
  <OutputXMLFormat>0</OutputXMLFormat>
  <AuthenticationToken />
  <HotJobs />
  <JobDescription>NO</JobDescription>
  <IncludeAllRecruiterInfo>Yes</IncludeAllRecruiterInfo>
  <IncludeAllHiringManagerInfo>Yes</IncludeAllHiringManagerInfo>
  <IncludeReqSubForms>2743,2749</IncludeReqSubForms>
- <ProximitySearch>
  <Distance />
  <Measurement />
  <Country />
  <State />
  <City />
  <zipCode />
</ProximitySearch>
  <JobMatchCriteriaText />
  <SelectedSearchLocaleId />
- <Questions>
- <Question Sort="No" Sortorder="ASC">
  <Id>990</Id>
  <Value>TG_SEARCH_ALL</Value>
</Question>
</Questions>
</InputString>
- <ResultSet>
- <Jobs>
- <Job>
  <Question Id="1039">17553BR</Question>
  <Question Id="996">N/A</Question>
  <Question Id="994">N/A</Question>
  <Question Id="988">2456</Question>

```

```
<HotJob>No</HotJob>
<LastUpdated>22-Apr-2012</LastUpdated>
<JobDetailLink>https://sqa-tgweb-
01.brassring.com/1033/ASP/TG/cim_jobdetail.asp?partnerid=516&siteid=8923&jobid=44379</JobDetailLink>
<HiringManagerName>padmavathi Quant</HiringManagerName>
<HiringManagerSystemId>806514</HiringManagerSystemId>
<HiringManagerEmailId>pboddu@kenexa.com</HiringManagerEmailId>
<HiringManagerEmployeeId>1099</HiringManagerEmployeeId>
- <FormTypes>
<HiringManagerName>Srikanth Ganivada</HiringManagerName>
<HiringManagerSystemId>806866</HiringManagerSystemId>
<HiringManagerEmailId>srikanth.ganivada@kenexa.com</HiringManagerEmailId>
<HiringManagerEmployeeId>1098</HiringManagerEmployeeId>
- <ReqSubFormInfo>
- <FormTypes>
- <FormType id="2749">
<FormDBName>_RDP584EncryReqSub</FormDBName>
<FormTitle>_RDP584EncryReqSub</FormTitle>
- <FieldsInformation>
<QId>1056353</QId>
<DBName>Autofill_PadmaReq</DBName>
<Description>Autofill_PadmaReq</Description>
- <options>
<option Code="^DEDD532E350D0455">RB2</option>
</options>
<QId>1056354</QId>
<DBName>CheckBox_Encry</DBName>
<Description>CheckBox_Encry</Description>
- <options>
<option Code="^9FF532B3388B7384CDCA109BC7454CCC02BD7DFCF5D21CF2">CheckBox_1</option>
<option Code="^9FF532B3388B7384CDCA109BC7454CCCE30A77050163A28C">CheckBox_2</option>
</options>
<QId>1056355</QId>
<DBName>Date_Encry</DBName>
<Description>Date_Encry</Description>
- <options>
```



```

<option Code="">//</option>
</options>
<QId>1056356</QId>
<DBName>Email_Encry</DBName>
<Description>Email_Encry</Description>
- <options>
  <option Code="">dfdsf@yahoo.com</option>
</options>
<QId>1056358</QId>
<DBName>MS_Encry</DBName>
<Description>MS_Encry</Description>
- <options>
  <option
Code="519E2951AA150C5BEF60C4498A2C5E7499681454CAE77C8EDEBEB6D91D95507A5D22F8DC4A
7A6DA68769C1CFBE696F0E">India Bulls In market</option>
</options>
  <QId>1056359</QId>
  <DBName>Numeric_Encry</DBName>
  <Description>Numeric_Encry</Description>
- <options>
  <option Code="">56</option>
</options>
  <QId>1056360</QId>
  <DBName>RB_encry</DBName>
  <Description>RB_encry</Description>
- <options>
  <option
Code="2C40D41EB67631FBB24A59999353E3A6C470B199E36AE84EF6F8E0776FF7609F07E2961D981E
9439">RB1 to test the API</option>
</options>
  <QId>1056361</QId>
  <DBName>SS_Encry</DBName>
  <Description>SS_Encry</Description>
+ <options>
  <QId>1056362</QId>
  <DBName>Text_Encrypt</DBName>
  <Description>Text_Encrypt</Description>
-+<options>

```

```
<QId>1056363</QId>
<DBName>TextArea_Encry</DBName>
<Description>TextArea_Encry</Description>
-+<options>
  </FieldsInformation>
  </FormType>
  </FormTypes>
  </ReqSubFormInfo>
  </Job>
- <Job>
  <Question Id="1039">17546BR</Question>
  <Question Id="996" />
  <Question Id="994" />
  <Question Id="988">092012</Question>
  <HotJob>No</HotJob>
  <LastUpdated>19-Apr-2012</LastUpdated>
  <JobDetailLink>https://sqa-tgweb-01.brassring.com/1033/ASP/TG/cim\_jobdetail.asp?partnerid=516&siteid=8923&jobid=44369</JobDetailLink>
  <RecruiterName>padmavathi Quant</RecruiterName>
  <RecruiterSystemId>806514</RecruiterSystemId>
  <RecruiterEmailId>pboddu@kenexa.com</RecruiterEmailId>
  <RecruiterEmployeeId>1099</RecruiterEmployeeId>
  <HiringManagerName>Srikanth Ganivada</HiringManagerName>
  <HiringManagerSystemId>806866</HiringManagerSystemId>
  <HiringManagerEmailId>srikanth.ganivada@kenexa.com</HiringManagerEmailId>
  <HiringManagerEmployeeId>1098</HiringManagerEmployeeId>
<ReqSubFormInfo>
</Job>
+<Job>
+<Job>
+<Job>
+<Job>
+<Job>
+<Job>
</Jobs>
  </OtherInformation>
  <TotalRecordsFound>16</TotalRecordsFound>
```

```
<MaxPages>1</MaxPages>
<StartDoc>1</StartDoc>
<PageNumber>1</PageNumber>
</OtherInformation>
</ResultSet>
</Payload>
- <Status>
  <Code>200</Code>
  <ShortDescription>Successful Search API Call</ShortDescription>
  <LongDescription>The Search API call has been successfully completed and returned with
results.</LongDescription>
  </Status>
</Unit>
- <Status>
  <Code>200</Code>
  <ShortDescription>Success</ShortDescription>
  <LongDescription>All units are processed with success codes</LongDescription>
  </Status>
</Envelope>
```



Supported Browsers

April, 2012

Browser Support

Kenexa supports¹ its solutions on a variety of operating systems² and web browsers³. New browser versions are also supported as indicated by a '+' symbol. For example, support for Internet Explorer 9+ would include Internet Explorer 10 or greater upon official release.

	Internet Explorer			Firefox	Safari	Chrome
	6	7-8	9+	11+	5+	18+
2x BrassRing	● ⁴	●	●	● ⁴	●	●
2x BrassRing Workbench	●	●	●			
2x Onboard	●	●		●	●	
2x Perform	●	●	●	●	●	
2x Recruit	●	●	●	●	●	◐
Interview Builder		●				

Key: ● : Full feature support. ◐ : Candidate experience

¹ Kenexa measures browser page load times and page performance under simulated load conditions to ensure reasonable response times; specific configurations and usage patterns may result in dramatically different response times.

² 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 Manager browser requirements are the same as for 2x BrassRing.

³ Web browsers should be configured to accept cookies, with browser security settings set to medium or lower.

⁴ 2xBrassRing is also supported on Firefox 9+ for Linux.
Support for IE 6 and FF 3.6 expires on 12/31/2012.

For 2x BrassRing Talent Gateways and Agency Manager, the following platforms are supported⁵:

	Internet Explorer 6.0+	Firefox 3.0+	Safari 4.0+	Chrome 12+
Talent Gateway	◐	◐	◐ ⁵	◐
Agency Manager	◐	◐	◐	◐

⁵We 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.

⁵ 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.BrasRing.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.

Browser Plug-ins

Selected module features may require browser plug-ins as per the following table. The absence of these plug-ins will not prevent other portions of the solutions from operating.

	Adobe Flash Player	Adobe Reader	Adobe SVG Viewer
2x Onboard	Version 9.0+ (Administration Center) Version 10.1+ (New Hire Portal)	Version 9+	Version 3+ (Administration Center)
2x Recruit	Version 9.0+	Version 9+	Version 3+ (Administration Center)
2xBrass Ring		Version 9+	

Adobe® Flash® Player (<http://www.adobe.com/products/flashplayer/>) is a cross-platform browser plug-in that delivers expressive applications, content and video across screens and browsers.

Adobe® Reader® (<http://www.adobe.com/products/reader/>) is a cross-platform browser plug-in that delivers electronic document sharing, such as via PDF documents and forms.

Adobe® SVG Viewer (<http://www.adobe.com/svg/>) is a browser plug-in that delivers high-quality Scalable Vector Graphics (SVG) on the Web. SVG is a royalty-free vendor-neutral open standard developed under the W3C (World Wide Web Consortium) Process.

2x BrassRing eLinks

eLinks are supported on email clients that support HTML email.

2x Mobile - 2x Recruit

2x Recruit supports features such as Job and Offer approvals on the following mobile devices:

- **BlackBerry app:** BlackBerry devices running Blackberry® Device Software version 4.5 or later.
- **iPhone app:** iPhone devices running iOS version 3.1 or later.

However, not all screens in 2xBrassRing are optimized for a smartphone or tablet. Therefore, users using these devices will experience issues in some areas.

2x Mobile - 2x BrassRing

2x BrassRing supports features such as Requisition and Candidate approvals via HTML-compatible web browsers on iOS, Windows Mobile, and Android mobile devices.

Display

The minimum monitor setting is 1024 X 768.

Languages Supported in Kenexa 2x BrassRing

as of 17 May 2012

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
Arabic	Saudi Arabia	New UI			X (WCAG only)						
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						
Hebrew	Israel				X (WCAG only)						
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
Romanian	Romania				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		15	11	13	38	16	6	1	1	5	19
Total Languages		13		11	30	13	6	1	1	4	