

IBM Kenexa BrassRing on Cloud

# **Product Update Guide with Configuration**

*Release 14.0*

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*Date: 31 August 2015*



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This edition applies to IBM Kenexa BrassRing on Cloud version 14.0.

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# Attachments – Access Restriction by Categories

This feature aims at setting up access restrictions to the attachments that are added to the BrassRing system via various methods. Access restrictions are implemented based on user type of the users and the categorization of the attachments into sensitive and non-sensitive attachment categories.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
Feature Areas LDP 224	BrassRing	Workbench Self-Service
Visible Changes	No – requires specific conditions / configuration for visibility.	
How do I get this feature?	Specific conditions required – see details below. Configuration required – contact our Support Team for implementation details.	

## Feature Description

This feature is based upon the clients request for setting up configuration based user access restrictions to attachments based on sensitive and non-sensitive categories.

While adding a new category if it is configured to be a sensitive attachment category, the clients now have an option to configure it in such a way that BrassRing users' privileges to access sensitive attachments can be overridden based on the configuration of the new category.

## BrassRing User Experience

Two new category level user privileges are added:

- View sensitive attachments – all

Depending on this new user type privilege setting:

BrassRing users with this privilege see the name of the sensitive attachment as a hyperlink in all grids and workflows. Users can launch and view the attachment content by selecting the hyperlink.

- View sensitive attachments - my reqs

Depending on this new user type privilege setting:

BrassRing users with this privilege see the name of the sensitive attachment as a hyperlink in all grids and workflows. Users can launch and view the attachment content while a) working in a req context; and b) owning the req (i.e., having the "my" relationship to the req).

## How Do Clients Get this Feature?

This feature is controlled by new attachment category level configuration

Please contact our Support Team or your Certified Workbench User for more information.

# Configuration Tasks

This section describes the tasks required to configure this feature. Tasks labeled Workbench Self Service can be performed by certified Workbench Self Service users or by our support staff.

## Attachment Categories – Workbench Self-Service (Tiers 0+)

A new group of settings called "Sensitive attachment privileges" are now available on the "Add new attachment category" page (and on the related pages).

### Workbench Path:

**Tools > Settings > Attachment Categories > Add new attachment category**

**Tools > Settings > Attachment Categories > Edit attachment category**

The screenshot shows the 'Edit Attachment category details' form for 'Interview Notes RV'. At the top, a red warning states: 'The following Gateway Questionnaires will be affected by this change:'. Below this, the 'Attachment category' is set to 'Interview Notes RV' and the language is 'English (US)'. The 'Sensitive attachment category' is set to 'Yes'. Under 'Sensitive attachment privileges', 'Override privileges in Candidate Actions 2' is set to 'Yes'. There are two lists for 'View Sensitive attachments': 'all' (Selected (1)) and 'my reqs' (Selected (2)). At the bottom, there are 'Save', 'Revert to saved', and 'Cancel' buttons.

When you add or edit a category, if you configure this category as sensitive category, you have the option to either respect the existing user type privileges or override them.

To configure the settings for this "Sensitive" attachment category:

1. Select **Yes** for **Sensitive attachment category** field (settings in the Sensitive attachment privileges area are disabled until you do so).
2. To override the existing more general privileges for sensitive attachments, you must explicitly select **Yes** for **Override privileges in Candidate Actions 2**.
3. If you select to override the user type privileges for this category, select the user types that need access to the attachments of this category. Select one or more user types for one or both privileges. Do not select the same user type in both lists.
  - View Sensitive attachments – all (users can launch and view the content of the Sensitive attachment in any flow where the linked attachment name appears, regardless of req ownership or req context)
  - View Sensitive attachments - my reqs (launch and view the content of the Sensitive attachment only in the req context and only for reqs to which the user has the "My" relationship)



When you select the option to override the users' privileges for sensitive category attachments, if you do not select the users for any of the category level settings, **no** BrassRing user can access the attachment of this category

# Candidate Forms – Mobile Optimization

This feature optimizes the candidate forms to the smaller screen sizes of mobile devices. This enhances the experience of mobile users when candidates and users access the forms using tablets and smart phones.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> LDP 243	<input checked="" type="checkbox"/> BrassRing	
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic – see details below.	

## Feature Description

Increasing numbers of candidates and BrassRing users are using mobile devices to access, edit and submit the forms that they receive via eLink and email. When forms are accessed using mobile web browsers, it is possible to have issues due to the orientation and size of the mobile device screens, as the forms are designed for usage with desktop and laptop computers.

With this project, the candidate forms are optimized for usage with mobile devices like smart phones and tablets, thereby enhancing the user experience of candidates and users who access forms using mobile devices.

A mobile optimized candidate form is automatically presented when the BrassRing system detects that the candidate form is being accessed via a mobile device browser.

## BrassRing User and Candidate Experience

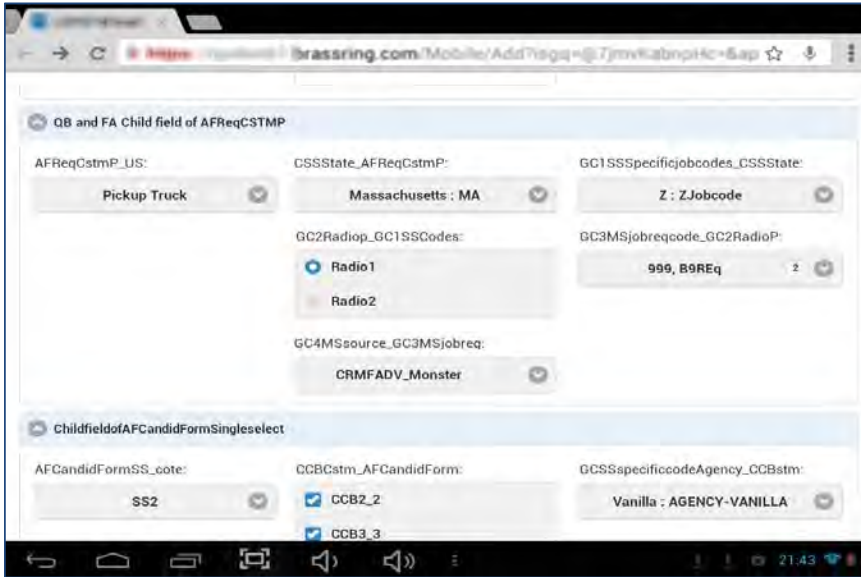
A user or a candidate may receive a candidate form based on one or more of the following actions in BrassRing:

- eLink blank form
- eLink form to view
- eLink form to edit
- email (form as attachment)
- RAM trigger to send email (form as attachment)

Depending on the screen's orientation, size and resolution, the form is presented in three different formats within the web browser.

### Landscape Orientation:

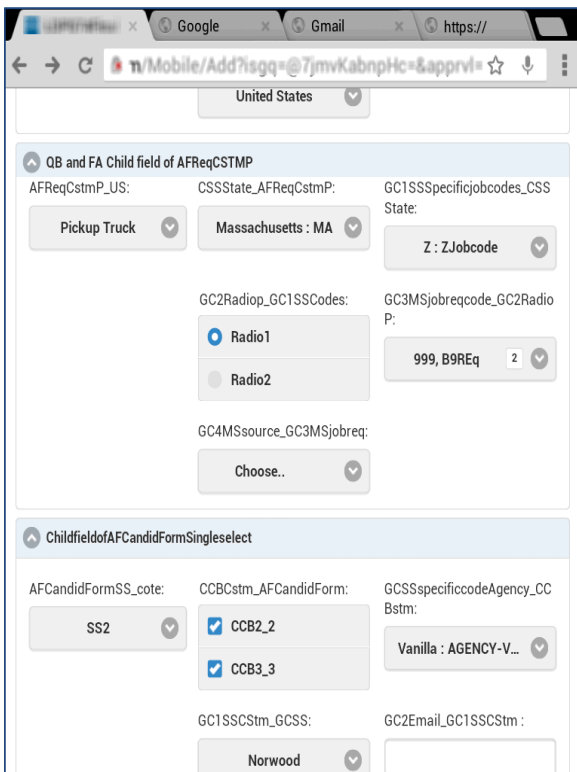
This format is displayed when the system detects that the candidate form is presented on a tablet being used in landscape mode. The form fields are arranged in three columns.



### Portrait Orientation

There are two different formats in which the candidate forms are displayed when the mobile device screen is used in portrait orientation. The selection of the display format is made depending on the screen size of the mobile device used to access the form.

When a tablet is used in portrait orientation, the form is displayed in a three-column format. The following figure shows a candidate form displayed with a tablet used in portrait orientation.



When a smart phone is used in portrait orientation, the form is displayed in single-column format. The following figure shows a candidate form displayed with a smart phone used in portrait orientation.



https://staging128.brassring.cc

Talent-Gateway - One place for opportunity - in progress

\*Are you willing to Relocate?:

No

Yes

Yet to confirm\_US

\*What is your marital status:

Choose...

Your Passport status:

Choose...

\*Do you have valid visa:


CodeNo

### Form Privileges

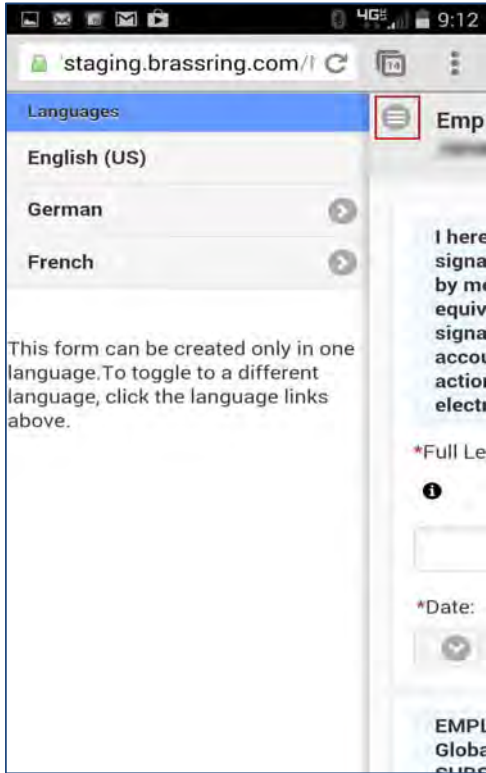
The following form privileges apply for forms accessed using a mobile device. If an eLink recipient does not have the privileges to add/view/edit a form, they do not see the form.

- Add/view/modify my
- View – my reqs
- View all
- Modify – my reqs
- Modify all
- Delete all - This setting does not any impact on the Mobile optimized candidate form as forms are NOT deleted in eLinks but from within the BrassRing application.
- Save as Draft – The “Save as Draft” control is displayed on the form if the user/candidate that accesses the form has the user type privilege to save the form as draft.

### Translation

Select the  icon to view the language menu for selection.

This icon is displayed to candidates or users if the form being accessed is translated into at least one language. If the form has never been translated, then the icon is not displayed as there are no options for selection.



For BrassRing system users, the form displays by default in the language that is configured in their user profile. For non-system users, the language of the browser is used by default.

### Limitations and Known Issues

- Print function of the candidate forms is not available when they are accessed using mobile devices.
- Candidates and users do not have the option of accessing the desktop version of the form when it is accessed using a mobile device.

### How Do Clients Get this Feature?

This feature is available automatically without configuration.

# Candidate Search – Proximity Search Enhancements

The candidate search functionality in IBM® Kenexa® BrassRing® on Cloud is enhanced in this feature by making use of new map vendors and the keys provided by them.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> LDP 239	<input checked="" type="checkbox"/> BrassRing	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact our Support Team for implementation details.	

## Feature Description

Recruiters' search for candidates within BrassRing is now enhanced by using an API-based integration of proximity search with third-party map vendors such as Bing or MapQuest, instead of working with static data. This enhanced functionality is already implemented for Job Search on BrassRing Talent Gateways, and is now available for configuration in BrassRing for users with privileges to access candidates and requisitions.

Two new proximity based search fields are added in Candidate Search in BrassRing. The existing proximity search fields City, State, Country and Zip have been replaced with the new proximity fields **Location** and **Distance within** on the Candidate Search page.

Issues with accuracy of city latitude and longitude data have also been addressed.

## BrassRing User Experience

While searching for candidates in BrassRing, instead of selecting city, state, and country values from multiple drop-down fields, you provide the location information in one text box with a predictive-text feature.

**Path: Candidates > Search > Proximity Search**

The screenshot shows the BrassRing Candidate Search interface. At the top, there are navigation tabs: Reqs, Candidates, Reports, and Admin. Below this is a 'Search' section with 'Save search' and 'Edit search fields' buttons. The 'Search criteria' section includes 'JOB CODE' and 'Job Req' fields, each with a 'List >>' button. The 'Proximity Search' section is highlighted with a red box and contains a 'Location' text box with 'waltham' entered. A dropdown menu is open below it, showing a list of locations: 'Waltham, Middlesex County, MA, US', 'Waltham, La Salle, IL, US', 'Christchurch City, Canterbury, NZ', 'Waltham, Kent, England, GB', and 'Waltham, Hancock, ME, US'. Below the 'Location' field is a 'Distance within' field. To the right of the 'Proximity Search' section, there are 'Search', 'Clear', and 'Revert to last sea' buttons, and a 'Years Experience' field with a 'Min' label.

You can provide the name of city, the zip code, state/province, or country, triggering the predictive text from which you can then select the correct location.



The predictive text box provides combination results with country, state and city irrespective of whether you start with country, state, city, or Zip code.

You also specify the desired maximum distance from that location to further define the search area. The **Distance within** field has two single select text boxes that allow you to select the distance and the measurement units. The default values for Distance within are **15** and **Miles**.

## How Do Clients Get this Feature?

This feature is controlled by existing and new client settings, and requires configuration of map keys from map vendors.

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

# Configuration Tasks

This section describes the tasks required to configure this feature. Tasks labeled Workbench Self Service can be performed by certified Workbench Self Service users or by our support staff.

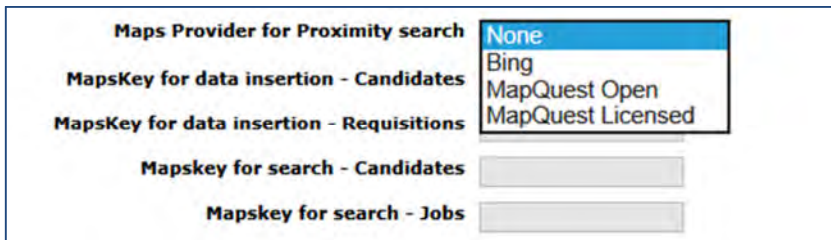
## Client Settings – Workbench (Support Staff)

Currently three maps vendors are available for all BrassRing clients: Bing, Map Quest Open (no fee), and Map Quest Licensed. Use existing client setting **Maps Provider for proximity search** to select the vendor.

**Workbench > Select a client > Edit**

–OR–

**Workbench > Admin > Manage Clients > Edit client settings** [for selected client]




The screenshot shows a configuration form with the following fields and options:

- Maps Provider for Proximity search**: A dropdown menu with options: None, Bing, MapQuest Open, and MapQuest Licensed.
- MapsKey for data insertion - Candidates**: A text input field.
- MapsKey for data insertion - Requisitions**: A text input field.
- Mapskey for search - Candidates**: A text input field.
- Mapskey for search - Jobs**: A text input field.

Insert the key obtained from the map vendor you are using in the field for the appropriate MapsKey setting:

- **MapsKey for data insertion – Candidates** (new)  
The key entered in this text field uses the map vendor data to update candidate profile fields.
- **MapsKey for data insertion – Requisitions** (renamed, previously was Maps Provider Key)  
The key entered in this text field enables users to update proximity coordinates field in requisitions with the data fetched using Map vendor’s API.
- **MapsKey for search – Candidates** (new)  
Enter the vendor key to use proximity search for candidate searches within BrassRing
- **MapsKey for search – Jobs** (new)  
Enter the vendor key to use proximity search for job searches within BrassRing Talent Gateways

 Please note that **MapQuest Open** is an open-source mapping vendor. If a location is not found on MapQuest Open, clients are required to add the same as a new location on **MapQuest Open**.

You must provide a Key from the selected vendor in at least one of the four MapsKey settings.

Please note that the system does not validate the correctness of the Maps provider key entered in the text field.

# Candidate Tiering – Initiation Options

Candidate tiering can now be initiated when a requisition is opened, rather than when it is posted. This feature extends the candidate tiering functionality to clients who use Evergreen requisitions.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> RDP 713	<input checked="" type="checkbox"/> BrassRing	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact our Support Team for implementation details.	

## Feature Description

Background: Clients who use Evergreen requisitions sometimes source from an Evergreen req instead of posting a req explicitly. In such cases, the candidate tiering activity should start for the req even though it is not posted.

This feature is an enhancement for existing candidate tiering functionality. Previously, candidate tiering was initiated only after a requisition had been posted to a BrassRing Talent Gateway.

A new requisition template (req form) attribute now allows candidate tiering to be initiated when a requisition is opened. Appropriately-privileged req template administrators change the template setting in Workbench.

## BrassRing User Experience

BrassRing begins placing filed candidates into tiers X number of hours after:

- Initial req status change to Open

–OR–

- When the requisition is posted to any Talent Gateway.

where the initiating event is based on the **Tiering initiation period start event** attribute, and X is based upon the **Tiering initiation period (hours)** attribute in the req's requisition template.

## How Do Clients Get this Feature?

For clients with candidate tiering enabled, this feature is controlled by an existing req form attribute, which has been enhanced. Please contact our Support Team or your Certified Workbench User for more information.

# Configuration Tasks

## Req Form Field Attributes – Workbench Self-Service (Tiers 1+)

Set the **Tiering initiation period start event** attribute in:

**Tools > Forms > Reqs > Req forms > Edit form attributes >**

The screenshot shows the 'Edit Req form' window. At the top, the 'Tiering initiation period start event' is set to 'Post to any TG' (selected) and 'Req open'. Below this, the 'Tiering initiation period (hours)' is set to 0. A note states: 'Candidates in the second tier based on order configured below will not be shown until this time period has elapsed once req is initially posted on any TG or Req is opened'. The 'Tiering selection' section contains two lists: 'Available tiers' (with four entries: Tier display name 1, 2, 3, 4) and 'Selected tiers(in order)' (empty). Between the lists are 'Add' and 'Remove' buttons. To the right of the 'Selected tiers' list are 'Move Up' and 'Move Down' buttons.

- To initiate candidate tiering when the req is opened, select **Req open**.
- To initiate when the req is posted to a Talent Gateway, select **Post to any TG**.

# Candidates – Bulk Printing of Cover Letters and Forms

The Prepare for Bulk Printing candidate action has been extended to include candidates’ cover letters and forms.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> LDP 241	<input checked="" type="checkbox"/> BrassRing	
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic for clients with Bulk Print enabled – see details below.	

## Feature Description

The Prepare for Bulk Printing candidate action now prints candidates’ cover letters and candidate forms, with the addition of two new fields on the “Prepare to Bulk Print” screen: **Forms** and **Cover Letters**.

BrassRing users can prepare and email a .zip file of information (.pdf files if they exist, otherwise text files) for up to 100 selected candidates. The information sent for printing can include: candidate’s overview, resume/CV, cover letters, forms, attachments, and letter templates.

## BrassRing User Experience

To bulk print candidate data:

1. From a candidate list, select up to 100 candidates. The Prepare for Bulk Print screen opens.



2. Select the types of information to be printed.
  - Overview includes contact info and experience/education summary
  - Resume/CV prints whatever is stored as a text file for each candidate or was included with the resume uploaded as a PDF file)
  - Cover letters
  - Forms (select desired forms; you see only those for which you have view or edit privileges)
  - Attachments
  - Letter template (users with privileges to add letter templates can select one letter template per candidate per request if this feature is enabled)
3. Specify a file name for the results file that will be emailed to you for printing.
4. Optionally add text for the email message.
5. Select **Send**.

## How Do Clients Get this Feature?

This feature is available automatically without configuration for clients with the **Bulk print enabled** client setting set to **Yes** or **Yes with letter templates**.

Users require these existing privileges to bulk print:

- **Candidate Actions 2 > Bulk print – request/receive files**
- **Candidate Actions > Candidates – print**
- To print attachments: **Candidate Actions > Attachments – add/view/delete “My BrassRing attachments”**
- To add one letter template per candidate per request to the print files: **Communications > Letters – add templates** (in addition, the **Bulk print enabled** client setting must be enabled with **Yes with letter templates** option).

## Configuration Tasks

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This section describes the tasks for configuring this feature. Tasks labeled Workbench Self Service can be performed by certified Workbench Self Service users or by our support staff.

### Client Settings – Workbench (Support Staff)

Two client settings are associated with bulk printing, one existing and one new:

- **Bulk print enabled**
- **Candidate Bulk Print: Include All Attachments (not only Req specific)**

Set or change in:

**Workbench > Select a client > Edit**

–OR–

**Workbench > Admin > Manage Clients > Edit client settings** [for selected client]

#### Bulk print enabled

Existing client setting: **Bulk print enabled**

Allows bulk printing of candidate data

**Yes** – allows bulk printing

**Yes with letter templates** – allows bulk printing AND selection of one letter template per candidate per request to add to the print files.

**No** – default, does not allow bulk printing

#### Candidate Bulk Print: Include All Attachments (not only Req specific)

New client setting: **Candidate Bulk Print: Include All Attachments (not only Req specific)**

When bulk printing is initiated from within a specific req folder, controls whether attachments associated with other reqs to which the candidate has applied are included for printing.

**Yes** –includes attachments associated with other requisitions in addition to req-specific attachments and attachments that have no req association

**No** – excludes attachments associated with other requisitions

### Bulk Print Administration – Workbench Self-Service (Tiers 2+)

You can customize the message text of the notification email, as well as select the types of candidate information, including specific forms and letter templates, to be shown as default selections for BrassRing users on the Prepare for Bulk Print screen. Users can make different selections as well as de-select default choices.

Tools Training Admin Use Privacy Policy Resource Center Logoff

### Bulk print administration [Audit Trail](#)

**Message text**  
[This message appears as the body text on the file delivery e-mail]

Your bulk print request has been completed. To access the files for printing click on the link below.<HTML>

[English (US) Set to default]

**Files included in print request\***

- Overview
- Resume/CV
- Cover letter
- Forms

Selected (0)

- Attachments
- Letter template

\$gptest

## Candidates – Stacking Logic Additions

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With this project, 5 additional stacking logic schemas are available for BrassRing Talent Gateways and BrassRing Agency Gateways. This brings the total to 23.

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<b>Feature Areas</b> LDP 253	<input checked="" type="checkbox"/> BrassRing	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact our Support Team for implementation details.	

### Feature Description

In order to meet the customized duplicate stacking requirements of globally-based clients, five new stacking logic schemas have been added.

The new stacking logic schemas are available automatically for configuration for use with BrassRing Talent Gateways, Gateway Questionnaires, Mobile Apply, and BrassRing Agency Gateways.

- 19SL: candidate stacking field AND email AND (first name OR last name)
- 20SL: candidate stacking field AND other phone AND (first name OR last name)
- 21SL: candidate stacking field AND email AND other phone
- 22SL: last name AND email AND other phone
- 23SL: first name AND email AND other phone

### How Do Clients Get this Feature?

This feature is controlled by the candidate stacking logic schemas that need to be configured in Workbench. Please contact your BrassRing Support Team or your Certified Workbench User for more information about enabling this feature.

# Configuration Tasks

This section describes the tasks required to view and configure new stacking logic.

## Gateway Settings – Workbench Self-Service (Tiers 5+)

Below are the new stacking logic schemas that are added to the existing list of stacking logic schemas:-

- 19SL: candidate stacking field AND email AND (first name OR last name)
- 20SL: candidate stacking field AND other phone AND (first name OR last name)
- 21SL: candidate stacking field AND email AND other phone
- 22SL: last name AND email AND other phone
- 23SL: first name AND email AND other phone

**Workbench > Tools > Talent Gateways > Edit [selected TG] > Edit [button for] Contact fields and stacking logic**

**Workbench > Tools > Agencies > Edit [selected Agency gateway] > Stacking Logic tab**

Duplicate stacking logic:	Field name	Display	Required
01SL: first name AND (email OR home phone)	First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
02SL: first name AND last name AND (email OR home phone)	Middle Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
03SL: first name AND last name AND (email OR other phone)	Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
04SL: first name AND last name AND (home phone OR other phone)	Last name pronunciation key	<input type="checkbox"/>	<input type="checkbox"/>
05SL: first name AND last name AND (zip postal code OR home phone)	First name pronunciation key	<input type="checkbox"/>	<input type="checkbox"/>
06SL: first name AND last name AND (zip postal code OR email)	Contact e-mail address	<input checked="" type="checkbox"/>	<input type="checkbox"/>
07SL: first name AND middle name AND (email OR home phone)	Address line 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
08SL: middle name AND last name AND (email OR home phone)	Address line 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>
09SL: first name AND last name AND email	City	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10SL: first name AND last name AND home phone	Zip/Postal code	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11SL: first name AND last name AND other phone	Country	<input checked="" type="checkbox"/>	<input type="checkbox"/>
12SL: first name AND last name AND zip postal code	State/Region/Province	<input checked="" type="checkbox"/>	<input type="checkbox"/>
13SL: first name AND email AND home phone	Home phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
14SL: middle name AND email AND home phone	Work phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>
15SL: last name AND email AND home phone	Other phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>
16SL: candidate stacking field	Fax	<input checked="" type="checkbox"/>	<input type="checkbox"/>
17SL: candidate stacking field AND first name	Web address	<input checked="" type="checkbox"/>	<input type="checkbox"/>
18SL: candidate stacking field AND first name AND last name	Candidate stacking field	<input type="checkbox"/>	<input type="checkbox"/>
19SL: candidate stacking field AND email AND (first name OR last name)			
20SL: candidate stacking field AND other phone AND (first name OR last name)			
21SL: candidate stacking field AND email AND other phone			
22SL: last name AND email AND other phone			
23SL: first name AND email AND other phone			

- Select any logic from the list of the available schemas.

- The new schemas (19SL, 20SL, 21SL and 99SL) will be displayed only if a candidate stacking field is already configured.

# Communications – Edit Document from Preview

The Create Document workflow now allows users to perform last-minute editing in Microsoft Word, using all of Word’s capabilities, without the awkwardness of editing the structural document.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> LDP 220	<input checked="" type="checkbox"/> BrassRing	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Specific conditions required – see details below.	

## Feature Description

Previously, the Create document workflow generated a Microsoft Word document for the creation of the final PDF document that was saved in the system. However, users needing to edit documents near the end of the Create Document workflow could edit the “structural” document only, which included somewhat cumbersome blurbs and blurb token code. This feature allows users to perform last-minute editing of that Word document *in Word* (or in an alternative Word processor that supports the .doc/.docx file format), using all of Word’s capabilities, without the awkwardness of editing the structural document. The Preview Message window includes a new “Last minute edit” section. The final, automatically-generated Word document for each candidate is stored in this section. Users can launch the document in Word or Word alternative, and edit it and re-upload it as many times as desired.

For example, perhaps you need to change some instructions to the document recipient at the last moment, or something about the layout needs correcting. You perform a last minute edit, save it locally, upload the replacement document, and click Save as PDF. The final PDF file is generated from your uploaded document.

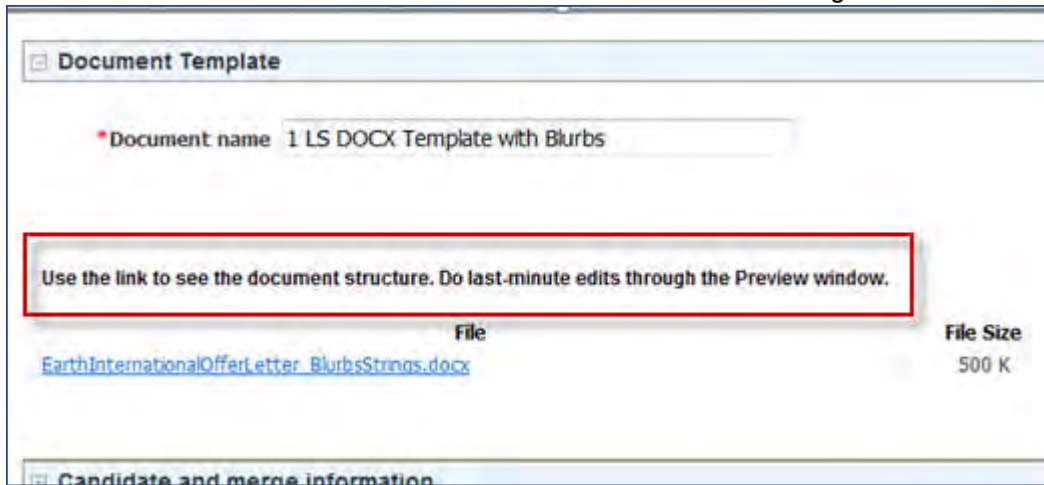
If you later use the same document template, all last minute changes made in the previous session have been discarded. They are not stored in the document templates, but apply only to the specific candidates for the specific documents you edit.

## BrassRing User Experience

What users see in the Document Template section of the Create document page (Reqs > select candidates > Create document > select template > Go) depends on their user type privileges.

Users with the user type privilege **"Create document - enable"** see some changes with this feature, although only for .doc/.docx document templates.

- New instructional text precedes the file storage grid of the generated document:  
"Use the link to see the document structure. Do last-minute edits through the Preview window."



- Browse and Upload buttons are removed from the file storage grid of the generated document.
- Large block of instructional text that no longer applies is removed.

Users with the "**User types authorized to edit content during document creation**" template privilege (which template administrators set in the document template **Attributes** section), also see additional changes, both for HTML-based and .doc/.docx-based document templates:

- Preview Message window now contains a new Last minute edit section. The final Word document, automatically-generated preparatory to creating a PDF for each candidate, is stored in the Last minute edit section at the top of the Preview message window.

To begin the Create document workflow:

1. Navigate to a requisition and select one or more candidates.
2. Click **Create document** in the Actions menu (on the candidates listing page or on a selected candidate's Talent Record). The initial Create document page opens.
3. Select a document template (HTML or .doc/docx) and click **Go**. The next Create documents page opens, showing the values specific to the candidate(s) selected.

For .doc/.docx templates, changes on the Document Template section of the page include:

- New instructional text precedes the file storage grid of the generated document:  
**"Use the link to see the document structure. Do last-minute edits through the Preview window."**
- Browse and Upload buttons are removed from the file storage grid of the generated document.
- Large block of instructional text that no longer applies is removed.



## View of docx template section of Create document page

For HTML templates, you see the same HTML editor window as in the past.

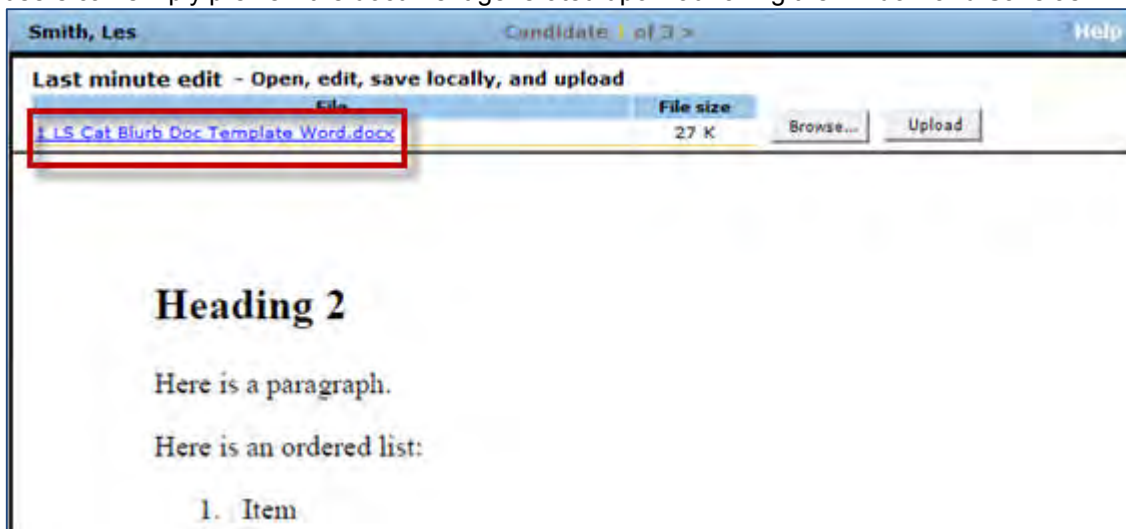
- To see the structural document view of a .doc/docx-based document:  
Click the document's file name link. This shows a version of the generated document that includes the universe of content that can be included in the document template (for example, all conditional blurbs and merge fields) irrespective of selected requisition and candidates. However, it is for informational or troubleshooting purposes only, and *is no longer editable*.
- Correct candidate and merge information as necessary in that section.
  - You can enter data for missing merge fields on the parent page even after uploading a modified .doc or .docx file in the Preview page.
  - For documents based on HTML templates, there are no changes to the workflow. You can edit blurb content for HTML-based blurbs before editing and uploading the generated document, but not after.
- To preview or edit the final, generated document for either an HTML or .doc/.docx based template (editing requires "**User types authorized to edit content during document creation**" template privilege):  
Click **Preview**.  
See following section *Previewing Documents and Making "Last Minute" Edits* for more details on previewing.

### Previewing Documents and Making "Last Minute" Edits

The Preview button behaves the same as before, except it always consumes the last version of a .doc or .docx file. The first version is generated by the system when you choose the document template and click **Go**. Any subsequent versions are due to a privileged user opening the generated version, editing it, saving it, and uploading the edited version to the Create documents page.

- To view the document as it will look when generated, click **Preview** on the Create document page. The Preview window opens. Users without editing privileges do not see the **Last minute edit** section. Those

users can simply preview the document generated upon launching the window and Save as PDF.



The Last minute edit section pertains to the candidate-specific document that appears in the Preview window. For multiple candidates, the user can navigate to the preview for each using the navigation controls in the bar displaying the current candidate name, and perform individual edits as desired. The system tracks which generated documents remain unchanged and which have been replaced by an uploaded document when doing the final Preview or the final Save as PDF actions.

2. To make changes, click the file name link in the Preview window. The generated document launches externally in Microsoft Word or any Word processing program that supports .doc/.docx files (such as OpenOffice).
3. Edit the document and save it to your local environment.
4. Return to the BrassRing Last minute edit page, **Browse** to where the edited document is saved, select it and click **Upload**. It appears on the Upload grid with the document size. Uploading the document causes it to be regenerated with the changes.
5. Click **OK** to close the window and refresh the Create document page based on the uploaded document.
6. Optionally click **Preview** again to see the latest version of the document in PDF.
7. When satisfied with the document, click **Save as PDF**. BrassRing processes and saves the latest version of the document as a PDF file to the Talent Record Attachments grid for each selected candidate.

## Limitations and Known Issues

- User cannot add new tokens into the uploaded document via Copy and Paste as the tokens are interpreted as literal text and won't work. To make merge or blurb tokens execute properly, users must add them to the underlying document template.
- In documents generated from HTML-based document templates, users cannot edit blurbs after uploading an edited version of the document.
- In documents generated from .doc/.docx-based document templates, users cannot selectively edit blurbs in the Candidate and merge information area on the Create document page. To edit a blurb in this generated instance of the document, the user must have the template-based user type privilege allowing him or her to edit the whole document.

## How Do Clients Get this Feature?

This feature is controlled by the existing client settings, user type privileges, and the existing document template attribute, **User types authorized to edit content during document creation**. Please contact our Support Team or your Certified Workbench User for more information about enabling this feature.

## Configuration Tasks

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This section describes the tasks required to configure this feature. Tasks labeled Workbench Self Service can be performed by certified Workbench Self Service users or by our support staff.

For this feature, client should have:

- Desired client settings (existing) from the following Client Settings section enabled
- Communications user type privileges (existing) from the following User Type Privileges section assigned to users who add and edit templates and blurbs, and who create documents.
- Document templates (DOC/DOCX and HTML) configured with "**User types authorized to edit content during document creation**" template privilege for desired user types (which template administrators set in the document template **Attributes** section), and any other desired attributes (such as pre-configured document name with merge tokens; merge tokens; blurbs, plain text blurbs).

### Client Settings – Workbench (Support Staff)

No new client settings need to be set for this feature. However, the following are existing client settings that can affect DOC/DOCX blurb and DOC/DOCX document template functionality:

- **Document templates (.doc/docx) - remove extra line break(s) caused by non-satisfying conditional blurb token(s)**  
Important for spacing of new paragraphs.
- **Document templates and blurbs – enable .doc/.docx file usage**  
Turns on DOC/DOCX blurbs and document templates. Must be set =Yes to access the entirety of the doc/.docx-based flow for blurbs and document templates.
- **Document/email generation - always allow edits**  
Allows user to edit items that are not wrong or missing in the Candidate and merge information area of the Create documents page.
- **Enable additional user information merge fields**  
Causes link to appear to Additional user information merge fields underneath the Merge fields control.
- **Enable Agency merge fields in blurbs and e-mail templates**  
If setting = Yes, users see the Agency variable group and merge tokens in the Merge fields control, but they cannot be used in Document templates.
- **Enable Clear Formatting with text editor**  
If setting = Yes, the Clear formatting link appears below the CK and YUI editors. CK editor has an icon that does the same thing but it is not tied to this setting.
- **Enable multiple conditions on blurbs**  
If setting = Yes, user can configure blurbs with multiple conditions instead of just one condition.
- **Enable Offer Letter Viewing Restriction**  
If setting = Yes, the setting "Restrict offer letter" appears on the document template. If the setting "Restrict offer letter" is checked on the document template, the Create document user can see documents generated from this template only if they are a member of the Req team and only in the context of that specific Req. This rule pertains to the Action log, the Attachments grid, and [possibly] to the Candidate Portal Posting History page.
- **Enable pre-filtered document templates**  
If setting = Yes, user can configure document templates with up to five pre-filtering conditions.
- **Date field format options - e-mail and document templates** (This is a restricted setting)  
If setting = Yes, user can select Date field format options. This setting is restricted because the date formats are hard-coded to date formats used in UK and US.

### User Type Privileges – Workbench Self-Service (Tiers 1+)

The following are existing Communications privileges that can affect this functionality.

- Blurbs - add
- Blurbs - administer
- Blurbs - delete
- Communications - enable
- Create document – enable
- Document templates - add
- Document templates - administer
- Document templates - delete

They are set in:

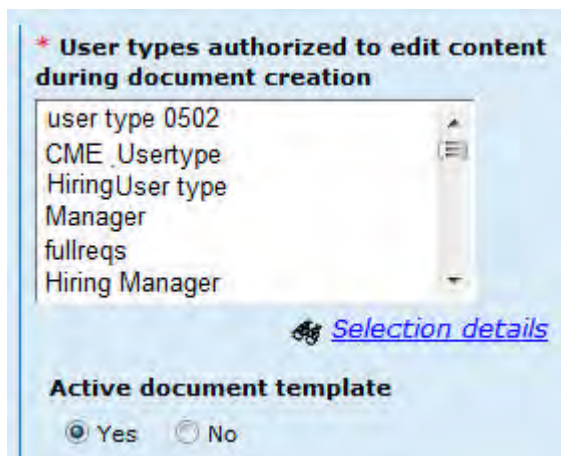
**Workbench > Tools > Users > User types > Edit type permissions [for selected type] > Communications**

## Document Template Edit Privilege – BrassRing Admin/Admin+ Users

Admin/Admin+ users create and edit document templates in BrassRing.

To authorize users to edit content during document creation:

1. Navigate to **Admin > Communication > Add/Edit Document Template**
2. In the Template attributes section of the Document template screen, select their user types in **User types authorized to edit content during document creation** selection box.



# Communications – Exporting Blurbs and Templates to Excel


IBM® Kenexa® BrassRing® on Cloud communications administrator users can now export, to Microsoft Excel, information on their account's blurbs, communications templates, and document templates. This makes it easier to audit the building blocks of your communications.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> LDP 176	<input checked="" type="checkbox"/> BrassRing	<input checked="" type="checkbox"/> Communications Administration
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic – see details below.	

## Feature Description

With this release, BrassRing communications administrator users can export information on their account's blurbs, communications templates, and document templates. For each category on the Communications administration pages, users have a new action item that launches the export corresponding report.

## BrassRing User Experience

A new Export to Excel action icon (  ) is visible on the following administration pages in the Communications Module to user types :

- Admin > Communications > Blurbs
- Admin > Communications > Communications templates
- Admin > Communications > Document templates

The action is available to users with these existing "Communications" privileges:

- Blurbs – administer
- Communications templates - administer
- Document templates - administer

## Initiating the Export

1. In BrassRing, navigate to the desired one of these screens:  
**Admin > Communications > Blurbs**  
**Admin > Communications > Communications templates**  
**Admin > Communications > Document templates**
2. To start the export, select Export to Excel icon.



Regs | Candidates | Reports | Admin

Welcome Super U

Communications: Document templates

Show 10 templates Showing 31 to 40 of 67 templates

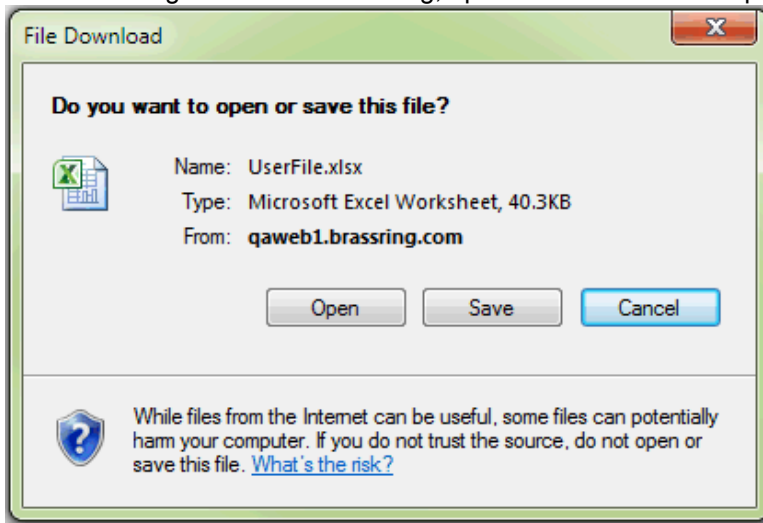
First Previous 2 3 4 5 6 Next Last

Actions	Template name	Created by
	1 LS Headings Restricted Styles	Smith, Leslie (eid)
	1 LS Inline Blurb Test	Smith, Leslie (eid)

For the blurbs or templates:

- If none exist, the icon does not appear.
- If client uses Org groups, user sees the icon only if at least one blurb/template matches an Org group to which the user belongs, and only those blurbs/templates that match appear in the report.
- If client does not use Org groups, all blurbs/templates display on this page and appear in the report.

3. In the resulting File Download dialog, open or save the audit report file, named **UserFile.xlsx**.



### Viewing the Output File

The Microsoft Excel export file has two tabs: **Properties** and either **Blurbs**, **Communications templates**, or **Document templates**.

The **Properties** tab includes summary information such as: Client name, Report name, Environment, User who ran the report, Total blurbs or templates in the report, date/times the report ran. (To see all the blurbs or templates in the system in the audit report, either the user running the report must be a member of all Org groups, or the client account must have no Org groups.)



	A	B	C
1	Client	Test Client	
2			
3	Report name	Blurbs audit report	
4			
5	Environment	Staging	
6			
7	Report run by	Sample, Sam	
8			
9	Total number of blurbs	3	
10			
11	Report run date	28-Jan-2014 22:35	
12			

The columns of the second tab, which presents the detailed data about the blurbs or templates, can be sorted and filtered in the usual way in the Excel spreadsheet. **Best Practice:** upon opening the exported file in Excel, freeze the top row.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Blurb name	Active	Added by	Added on	Edited by	Edited on	Editor	Uploaded DOC/DOCX file name	Org groups	User types allowed to modify blurb text during document/e-mail creation	Blurb category	Allow blurb selection during document/e-mail creation	Contained in	Merge tokens
2	Blurb1	Yes	King, Tony	22-Oct-13	Doe, Jane	6-Nov-13	HTML		Standard	Hiring manager		Yes	Communications:Email1	{#Contact-info:FirstNar
3	Blurb1	Yes	King, Tony	22-Oct-13	Doe, Jane	6-Nov-13	HTML		Org Group 4			Yes		
4	Blurb1	Yes	King, Tony	22-Oct-13	Doe, Jane	6-Nov-13	HTML		Org Group 3			Yes	Document.DocTemplateName3	
5	Blurb1	Yes	King, Tony	22-Oct-13	Doe, Jane	6-Nov-13	HTML		Org Group 2	Super User		Yes	Document.DocTemplateName2	{#Form:EEO_LastName#}
6	Blurb1	Yes	King, Tony	22-Oct-13	Doe, Jane	6-Nov-13	HTML		Org Group 1	Recruiter		Yes	Document.DocTemplateName1	{#Contact-info>LastNar
7	Blurb2	No	Smith, John	1-Sep-12	King, Tony	21-Dec-14	DOC/DOCX	NewHireInfo.docx	Standard	Hiring manager	Signature	Yes		{#Contact-info:FirstNar
8	Blurb2	No	Smith, John	1-Sep-12	King, Tony	21-Dec-14	DOC/DOCX	NewHireInfo.docx	Org Group 1			Yes		{#Contact-info>LastNar
9	Blurb2	No	Smith, John	1-Sep-12	King, Tony	21-Dec-14	DOC/DOCX	NewHireInfo.docx				Yes		{#NewHireInfo:18Yrs#}
10	Blurb2	No	Smith, John	1-Sep-12	King, Tony	21-Dec-14	DOC/DOCX	NewHireInfo.docx				Yes		{#NewHireInfo:HiringOf
11	Blurb2	No	Smith, John	1-Sep-12	King, Tony	21-Dec-14	DOC/DOCX	NewHireInfo.docx				Yes		{#NewHireInfo:OfficeLc
12	Blurb2	No	Smith, John	1-Sep-12	King, Tony	21-Dec-14	DOC/DOCX	NewHireInfo.docx				Yes		{#NewHireInfo:HireType#}
13	Blurb3	Yes	Doe, Jane	15-Mar-13	Smith, John	8-Aug-13	HTML		Standard	Recruiter		No		{#Contact-info:FirstNar
14	Blurb3	Yes	Doe, Jane	15-Mar-13	Smith, John	8-Aug-13	HTML					No		{#Contact-info>LastNar
15														
16														
17														

## Blurbs Tab

The **Blurbs** tab contains the following data:

- Blurb name
- Active – Yes if Active, No if Inactive
- Added by – name
- Added on – date
- Edited by – name
- Edited on – date
- Editor – HTML or DOC/DOCX
- Uploaded DOC/DOCX file name – name of the uploaded file if blurb uses a Word-based template (Editor is DOC/DOCX)
- Org groups – groups with access to blurb
- User types allowed to modify blurb text during document/email creation
- Blurb category
- Allow blurb selection during document / e-mail creation – indicates if blurb is selectable during document or email creation

- Contained in – name of Communications template and/or Document template in which blurb is contained
- Merge tokens – list of tokens contained in blurb
- Conditional – Yes if Conditional, No if not
- Conditional expression – single condition blurbs display as [condition]: [value(s)], multi-condition blurbs display the complete text of the condition expression

### Communication Templates Tab

The **Communication templates** tab contains the following data:

- Communications template name
- Active – Yes if Active, No if Inactive
- Added by – name
- Added on – date
- Edited by – name
- Edited on – date
- Org groups authorized to send
- Org groups authorized to administer
- Template type
- Agency
- Sending method – Manual Send, Auto Send, Auto and Manual Send (if Automation Manager is on)
- Email Message Body: merge tokens
- Email Message Body: blurb tokens
- SMS message: merge tokens – blank if client setting “SMS messaging – enable” is set to No
- Blurb names
- To email address – candidate form name followed by the email field name in token format: [#<CandidateFormName:EmailFieldName>#]
- Email subject line
- Return email address – displays if one was added manually
- Top / Bottom margin – None, 0.5", 1.0", or 1.5"
- Left / Right margin – None, 0.5", 1.0", or 1.5"
- Forms included
- Attachments included
- Save copy of correspondence – Yes indicates that content of sent communications template should be saved in addition to the record of sending it

### Document Templates Tab

The **Document templates export** tab contains the following data:

- Document template name
- Active – Yes if Active, No if Inactive
- Added by – name
- Added on – date
- Edited by – name
- Edited on – date
- Editor – HTML or DOC/DOCX
- Formatting template (DOT/DOTX) – if template is HTML, name of file used for headers and footers of generated documents
- Uploaded DOC/DOCX file name – if template is Word-based, name of DOC/DOCX file used for document template (all rows blank if Document templates and blurbs – enable .doc/.docx file usage” is set to No)
- User types authorized to edit content during document creation



- Org groups authorized to create
- Org groups authorized to administer
- Restricted Offer Letter – Yes or No (all rows blank if client setting “Enable Offer Letter Viewing Restriction” is set to No)
- Top / Bottom margin – 0.5", 1.0", or 1.5" for generated document (PDF)
- Left / Right margin – 0.5", 1.0", or 1.5" for generated document (PDF)
- Paper size for printed document – A4 or Letter
- Numbering format – numbering format configured for HTML-based document templates
- Pre-configured document name – Text and merge tokens contained in any pre-configured document name
- Candidate Portal: Allow posting to Candidate portal – all rows blank if client setting ‘Candidate portal’ is set to No
- Candidate Portal: Document subsidiary form
- Attachment category for generated documents
- Document Content: merge tokens
- Document Content: blurb tokens
- Pre-filter document templates – Yes if pre-filtering should be performed using the configured conditional expression
- Pre-filter conditional expression – conditional expression for pre-filtered (conditionally listed) template (all rows blank if client setting “Enable pre-filtered document templates” is set to No)

## Best Practice Recommendations

Upon opening the exported file in Excel, freeze the top row to display column names while viewing values.

## How Do Clients Get this Feature?

This feature is available automatically without configuration to users with the required Communications administration user type privileges.

# Communications – Plain Text Blurbs

A new type of blurbs called Plain Text blurbs are added to the system with this project. Administrators can add new plain text blurbs and edit the existing plain text blurbs.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> LDP 237	BrassRing	Communications
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic – see details below.	

## Feature Description

This project adds a new type of blurb that contains only plain text, Unicode characters, and no formatting. These blurbs can be added in document templates, either in-line with the existing text or as a new paragraph. When BrassRing administrators add or edit the document templates or blurbs in “.doc” or “.docx” formats, they are now able to add the plain text blurbs within them.

Plain Text Blurbs are of three types:

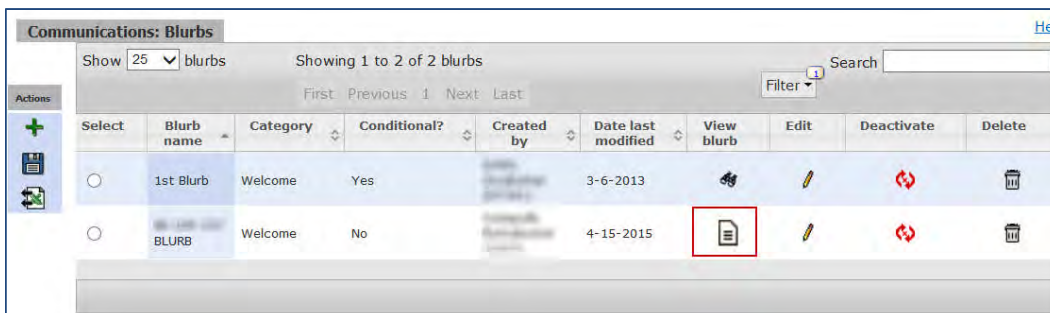
- **Regular Blurbs** – They consist of text: words, phrases, paragraphs, etc.
- **Conditional Blurbs** – This blurb’s content is displayed only if the blurb’s configured conditional attributes are met by the requisition or candidate for which the document is being generated.
- **Category Blurbs** – Blurbs that are user-selectable at run-time by virtue of belonging to the same Category.

## BrassRing User Experience

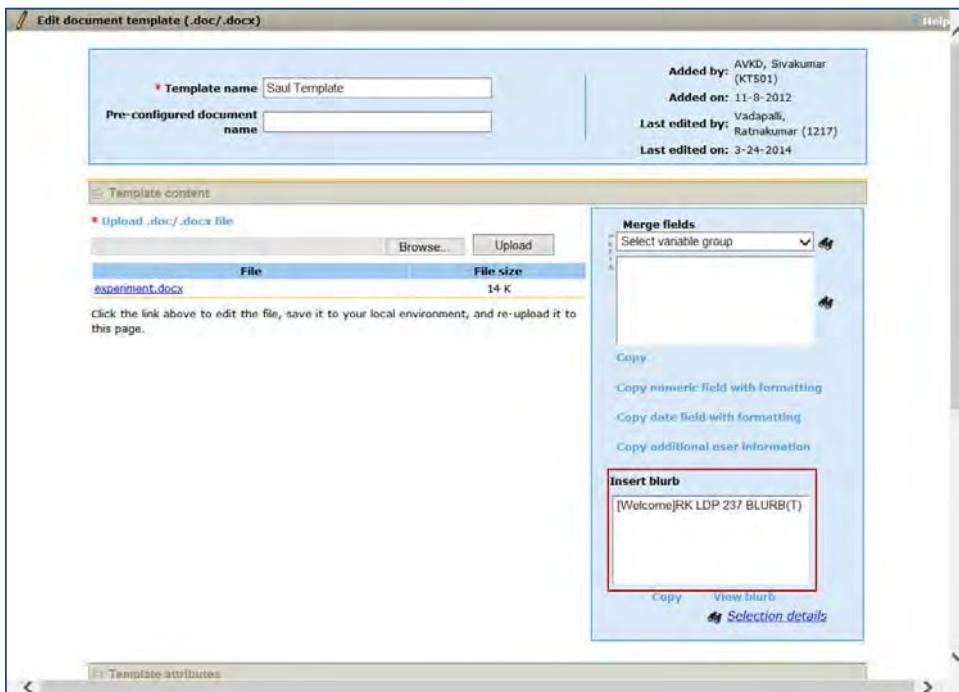
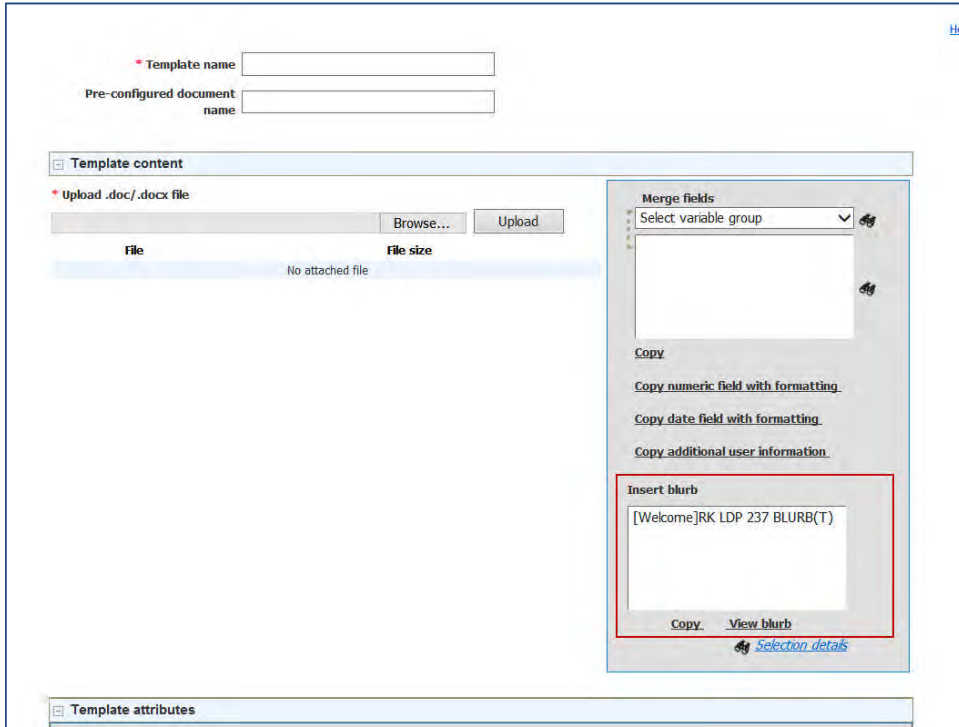
BrassRing users with appropriate privileges to create documents can view plain text blurbs that were inserted in various document templates. The blurbs are displayed as inserted, either inline or in a separate paragraph as added by the document’s administrator. Blurbs are displayed in the final document depending on the conditions if any are configured while creating the blurb.

## BrassRing Administrator Experience

When BrassRing administrators visit the View blurbs section, they can identify a plain text blurb from the rest of the blurbs based on the icon used for them, a stylized page with turned-down corner and three lines representing text.



When administrators add or edit document templates and blurbs based on doc/docx, plain text blurbs are available as a list for selection in a multi select control. The plain text blurbs end with (T). This annotation is for the purpose of identification.



## Limitations and Known Issues

The Plain text blurbs are not available for insertion in HTML based blurbs, HTML based document templates, or Communication Templates.

## How Do Clients Get this Feature?

This feature is available automatically without configuration. Users with appropriate user type privileges can add, edit, and administer the plain text blurbs in the BrassRing system.

Please contact our Support Team or your Certified Workbench User for more information.

# Configuration Tasks

---

This section describes the tasks required to configure this feature.

## Client Settings – Workbench (Support Staff)

There are no new client settings for this feature. However, the existing client setting **Document templates and blurbs – enable .doc/.docx file usage** must be configured to Yes for this feature.

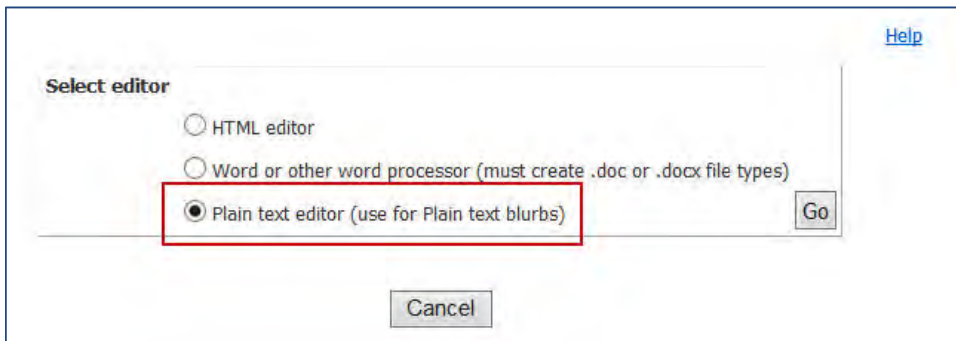
## Setup by BrassRing Admin/Admin+ Users

Users with appropriate privileges for adding, editing and administering blurbs can add the new plain text blurbs in the BrassRing system.

### Add Blurb

**Admin > Communications > Add Blurb**

A new type of blurb is now available in this screen for selection.



The screenshot shows a 'Select editor' dialog box. It has a title bar with a 'Help' link. The dialog contains three radio button options: 'HTML editor', 'Word or other word processor (must create .doc or .docx file types)', and 'Plain text editor (use for Plain text blurbs)'. The 'Plain text editor' option is selected and highlighted with a red rectangular box. To the right of the options is a 'Go' button, and below the options is a 'Cancel' button.

Select **Plain text editor (use for Plain text blurbs)** and select **Go**.

The Add Blurb (Plain text) screen is displayed. Please provide a unique name for each blurb. If the name you provide for a blurb is not unique, an error message is displayed while saving the blurb.

This screen has a text area where you can add the blurb's content. When you select the **Expanded view** hyperlink following the text area, a new window with bigger text area is displayed with enhanced font size.

After entering the blurb's text content, you can select from various merge fields that can be added to the blurb. You can add various attributes like conditions, and categories as per the requirements of the blurbs and select **Save** to add it to the existing list of blurbs.

## Save as New

### Admin > Communications > Blurbs

To save a plain text blurb as new, select the blurb and select the Save as New icon on the **Actions** panel.

Please note that you can only use an existing plain text blurb for this purpose and either a HTML based blurb or a doc/docx based blurb cannot be saved as a plain text blurb.

You can deactivate an active plain text blurb and activate an inactive blurb in the same way as you do for the existing blurbs. There are no changes in this process.

## Blurb Tokens

Two new token formats are introduced for the plain text blurbs. While inserting a plain text blurb in a document template or a blurb based on doc/docx, tokens with new format are displayed.

Token used for Regular Blurb	Token used for Plain Text blurb	Token used for Plain text blurb with a category
[#blurb:<name_of_blurb#]	[#blurb_text:<name_of_blurb>#]	[#blurb_text-category-name:<name_of_blurb>#]

# Communications – Restricted Offer Letter Setting

This feature restricts the viewing of offer letters in Talent Record logs to requisition team members. Those members can view those offer letters within the context of a requisition when they have a My Req relationship to the specified requisition. This functionality is available only for offer letters created using the Create document workflow.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> RDP 882	<input checked="" type="checkbox"/> BrassRing <input checked="" type="checkbox"/> Talent Gateways	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact our Support Team for implementation details.	

## Feature Description

This feature enhancement fully restricts the viewing of offer letters in a Talent Record (TR) Action Log, the TR Attachment Grid and in the TR Candidate Portal Posting History to BrassRing users who view them from within the context of a requisition AND who have a My Req relationship to the specified requisition.

Additionally, when a BrassRing user uploads offer letter attachments during the Send Communication workflow in the context of a requisition, the system checks if:

- attachment is a restricted offer letter
- attachment is a product of the create document workflow
- BrassRing user has a My Req relationship to the attachment

If the system verifies all the conditions, the attachment is uploaded as a restricted offer letter and only BrassRing users viewing attachment from within a req and with a My Req relationship to the offer letters can view the offer letter.

The My Req relationship must meet one of the following criteria:

- User is the Req creator, OR
- User is the Recruiter for the Req, OR
- User is the Hiring Manger for the Req, OR
- User is designated in the Requisition's Req team field, OR
- Req custom field designates user as having a My relationship to the Req

BrassRing users who do not have a My Req relationship with the specified req can see the offer letter listed in the Talent Record Action log, the Attachment Grid, and in the Talent Record Candidate Portal Posting History but the attachment name is not a link. In other words, they can see an offer letter was created but they cannot view the offer letter.

Formerly, because attachments were not req-specific if an offer letter displayed as an attachment on the TR, BrassRing users could view the offer letter. This feature blocks viewing access for BrassRing users who do not have a My Req relationship with the associated requisition.

This feature is available for either HTML or DOC/DOCX file type document templates.

## BrassRing User Experience

In order for a BrassRing user to create Offer Letters using the Create Document workflow with the Restricted offer letter functionality, the following conditions must be met:



- Client setting Enable Offer Letter Viewing Restriction must be enabled
- BrassRing user must have the Create Document privilege
- Offer letter must be created from within a req folder where the user has a "My" relationship to the requisition

User can then select a candidate and generate an offer document from a restricted document template. From within BrassRing, BrassRing user:

1. Selects a candidate within a req folder and selects **Action > Create Document**.

The Communications: Document Template page launches.

2. Selects a document template (HTML or DOC/DOCX) with the Restricted Offer Letter setting enabled.
3. Completes all document template fields and select the Restricted offer letter checkbox.

4. Select **Save as PDF**.

5. Selects candidate from within the same req folder and selects **Send Candidate Communication**.

6. **Selects email template and select Go**.

7. Completes all fields in the email template and uploads the Restricted Offer Letter. The Restricted Offer Letter displays as an email link in the body of the email.

The System checks if the attachment is a restricted offer letter, if the attachment is a product of the create document workflow, and if the user uploading the document has a My Req relationship to the attachment.

8. Selects **Send**.

BrassRing users viewing this offer letter from within a req and who have a My Req relationship to the requisition can view the offer letter on the candidate's Talent Record Action log, the Attachment Grid, and in the Talent Record Candidate Portal Posting History Grid.

## How Do Clients Get this Feature?

This feature is enabled via a client setting (Enable Offer Letter Viewing Restriction) and a document template setting (Restricted offer letter). Enabling the client setting allows BrassRing Administrators to create document templates with the Restricted offer letter setting for use by BrassRing users.

To use this feature, BrassRing users must have the requisite Create Document User Privileges.

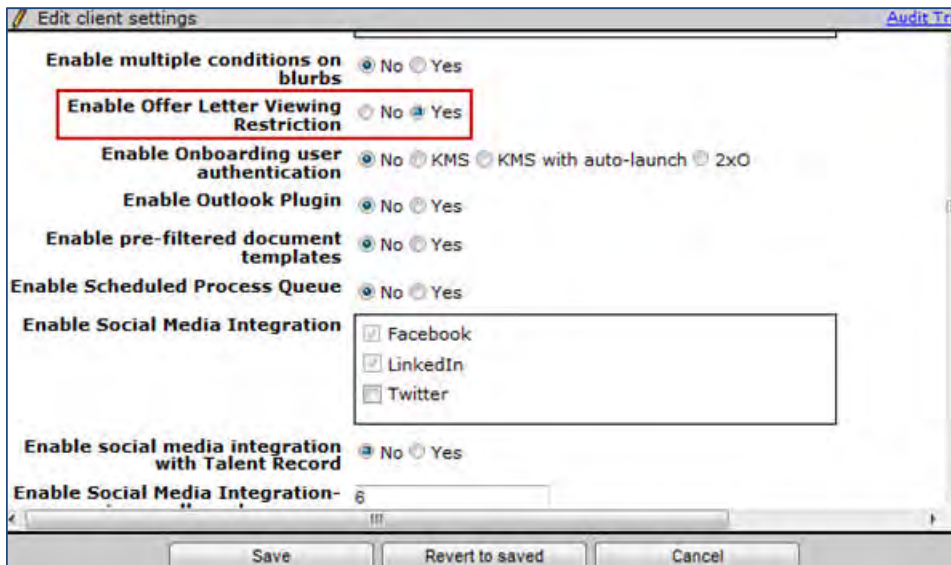
# Configuration Tasks

This section describes the tasks required to configure this feature. Tasks labeled Workbench Self Service can be performed by certified Workbench Self Service users or by our support staff.

## Client Settings – Workbench (Support Staff)

Use this procedure to enable the Enable Offer letter View Restriction client setting. Support Staff user:

1. Navigates to **Workbench > Select a client > Edit.**  
Client setting dialog box launches.
2. Selects **Yes** for the **Enable Offer Letter Viewing Restriction.**



3. Select **Save.**

## User Type Privileges – Workbench Self-Service (Tiers 1+)

To enable the Create Document Privileges, WBSS user:

1. Navigates to **Workbench > Tools > Users > User types > Edit type permissions > Communications.**
2. Selects Edit Type Permission pencil icon for the selected user type.  
The Set Name Function Dialog box launches.
3. Selects **Communications** pencil icon.  
The Set Communication Privileges dialog box launches.
4. Selects the checkbox for the **Create Document – enable** privilege.
5. Selects **Done.**
6. Selects **Save.**

## Setup by BrassRing Admin/Admin+ Users

BrassRing Administrators must enable the Restricted Offer Letter Document Template setting for BrassRing users creating offer letters using the Restricted Offer letter document templates in the Create Document workflow.

## BrassRing User Admin

BrassRing Admin User:

1. In BrassRing, navigates to **Admin > Communications > Document templates > Add document template** (HTML or DOC/DOCX type).

The Communications: Document Template page launches.

2. Selects a document template with the Restricted Offer Letter setting enabled.

Template attributes

Org groups authorized to create this document

- #0
- @#@test
- <b>Org</b>
- <b>Test Org Group</b>
- 0-<b>Org</b>
- 123ORGGROUP

[Selection details](#)

Select attachment category for generated documents:

Select

[Selection details](#)

\* Org groups authorized to administer this template

- #0
- @#@test
- <b>Org</b>
- <b>Test Org Group</b>
- 0-<b>Org</b>
- 123ORGGROUP

[Selection details](#)

\* User types authorized to edit content during document creation

List >>

Restricted Offer Letter

Active document template

Yes  No

3. Completes all document template fields and selects the Restricted offer letter checkbox.
4. Selects **Save**.

# Communications – Sending and Storing Candidate Email

When sending ad hoc and template-based emails, IBM® Kenexa® BrassRing® on Cloud users can now:

- Send to more copy recipients
- Exclude candidates, sending instead only to system user and non-system user (“Other”) recipients
- Store records of email sent to Other recipients on the Action Log and in Communication History.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
Feature Areas LDP 238	BrassRing	Workbench Self-Service
Visible Changes	Yes – details in <i>Visible Changes</i> document.	
How do I get this feature?	Automatic; Communications logging changes are visible only to clients with Communications history stored	

## Feature Description

When sending ad hoc and template-based emails, IBM® Kenexa® BrassRing® on Cloud users can now:

- Send to more copy recipients, both cc and bcc
- Exclude candidates, sending instead only to system users and non-system user (“Other”) recipients
- Store records of email sent to Other recipients as To, cc, or bcc on the Action Log and in the Communication History (when enabled) of the Talent Record.

## BrassRing User Experience

You now have more control over who receives candidate email, both ad hoc and template-based.

- You can now choose whether to send to candidates or only to other recipients.
- List of potential recipients is expanded to system users, non-system users, and even recipients from a personal email list (if one is configured).
- Sent communications for all recipients are stored in the Action Log and in the Communications History log on the Talent Record

## Expanded Recipient Options for Ad hoc Candidate Email

The “Candidate email” page opens when you select candidates and the **Send candidate ad hoc email** action on a panel or page listing candidates.

The page now includes:

- **To (email address)** field that is automatically populated with the email addresses of the selected candidates.
- New checkbox setting that is unchecked by default: **Exclude candidates and send only to the following recipients**. Choose this to exclude the candidates as recipients.
- If excluding candidates, new set of **To:** text boxes for the user to provide recipients' email addresses, including system users, non-system users.
- First name and last name tokens in the **Subject** field, appearing as #FirstName #LastName. You can move or remove them, copy and paste them into the body of the email, add additional text, as desired.
- You can **cc: (system users)**, **cc: (non-system users)**, and **cc: Personal email list** (if one is configured).
- These rows are stored on the **Action Log** and **Communication History** log.

### Expanded Recipient Options for Template-based Email

The "Email message" page opens when you send template-based email (select candidates from a panel or page with candidate listing > **Send Candidate Communication** action > [select communication template] > **Go**).

The page now includes:

- New, required **Send To** field, with radio buttons where you must select **Candidates** or **Other recipients**. Select **Candidates** if you wish candidates to be recipients.
- New set of **To:** text boxes if you select **Other recipients** in the **Send to** field. Select desired system user recipients and provide any desired non-system users' email addresses.
- Grayed out **To:** text box that contains the merge tokens for email addresses of the recipients if you selected an email template with preconfigured recipients

Additionally, template-based emails to Agency Contacts (initiated via Email Agency Contact action when selected candidates are agency referrals) now support Cc: and Bcc: recipients, both system and non-system users. These recipient options are available for manual workflows using "Manual" as well as "Auto and Manual Send" communications templates that are Agency templates.

## Action Log

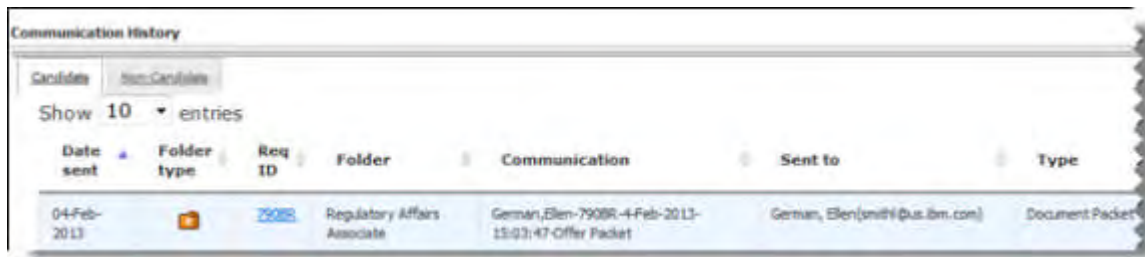
Emails sent in all the communication workflows to non-candidate recipients are now stored on the Action Log of the candidate Talent Record. The Action Log shows one row per recipient, grouped on the log in the following order:

- To recipients (can be candidates; or can be system and non-system users when candidates are excluded)
- Cc recipients (if they exist)
- Bcc recipients (if they exist; visible only to sender and actual bcc recipient)

Action	Date	Action by	Details	Name/Type	From	To
Communication - Email	29-Sep-2014	Belthou, Vicki (ID: 330-5204)	Status: Sent as bcc	238 To candidate (generic) no form	Belthou, Vicki (ID: 330-5204)	24db...
Communication - Email	29-Sep-2014	Belthou, Vicki (ID: 330-5204)	Status: Sent as bcc	238 To candidate (generic) no form	Belthou, Vicki (ID: 330-5204)	24db...
Communication - Email	29-Sep-2014	Belthou, Vicki (ID: 330-5204)	Status: Sent as cc	238 To candidate (generic) no form	Belthou, Vicki (ID: 330-5204)	Part...
Communication - Email	29-Sep-2014	Belthou, Vicki (ID: 330-5204)	Status: Sent as cc	238 To candidate (generic) no form	Belthou, Vicki (ID: 330-5204)	Recor...
Communication - Email	29-Sep-2014	Belthou, Vicki (ID: 330-5204)	Status: Sent as to	238 To candidate (generic) no form	Belthou, Vicki (ID: 330-5204)	Lamb...

## Communication History log

The Communication History log, when it is enabled, is accessed via the Talent Record. It has two new tabs: **Candidate** and **Other recipients**.



The screenshot shows the 'Communication History' interface. At the top, there are tabs for 'Candidates' and 'Non-Candidates'. Below the tabs, it says 'Show 10 entries'. The main area contains a table with the following columns: Date sent, Folder type, Req ID, Folder, Communication, Sent to, and Type. A single entry is visible in the table.

Date sent	Folder type	Req ID	Folder	Communication	Sent to	Type
04-Feb-2013		2988	Regulatory Affairs Associate	German, Elen-7908R-4Feb-2013-13:03:47-Offer Packet	German, Elen(smith@us.ibm.com)	Document Packet

- **Candidate** tab stores all the emails that are stored today for the candidate, except for the Agency contact emails. Agency contact emails now appear on the **Other recipients** tab.
- **Other recipients** tab stores all emails sent to non-candidate recipients (as To, Cc, and Bcc recipients).

Email stored in Communication History includes messages from all the following communication workflows:

- Ad hoc emails
- Communications template-based emails (Manual Send)
- Communications template-based emails (Manual Send, Agency)
- Communications template-based emails (Auto Send) sent via RAM/Automation, for example candidate notification of HR Status update.

## How Do Clients Get this Feature?

This feature is available automatically without configuration. Communications history is controlled by an existing client setting. Please contact our Support Team or your Certified Workbench User for more information.



# Configuration Tasks

This section summarizes the existing configuration settings required in order to use the Communication History feature. Tasks labeled Workbench Self Service can be performed by certified Workbench Self Service users or by our support staff.

## Client Settings – Workbench (Support Staff)

Client setting: **Communications history stored**

**Workbench > Select a client > Edit**

–OR–

**Workbench > Admin > Manage Clients > Edit client settings** [for selected client]

This now covers all the records to be stored on a Talent Record for recipients who are not themselves the candidate.

**Yes** – stores communications history for ad hoc and template-based email to candidates, whether candidate is included as a recipient or excluded as a recipient.

**No** – does not store history.

## User Type Privileges – Workbench Self-Service (Tiers 1+)

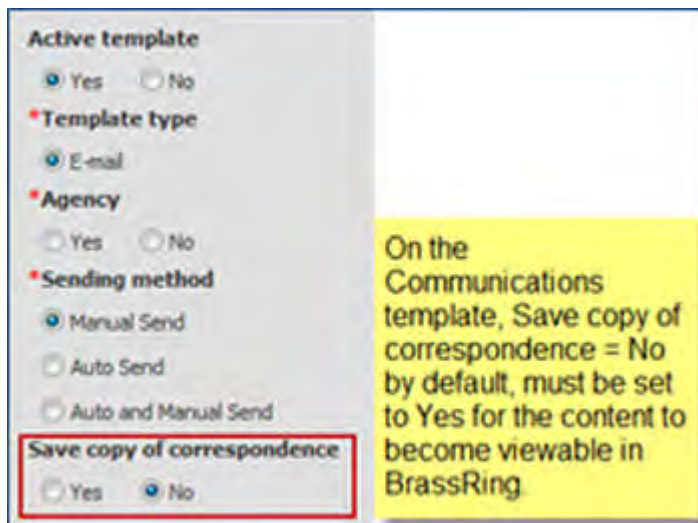
One of these existing user type privileges is required to view Communication History: **View all stored communication history** or **View stored communication history for my reqs only**.

**Workbench > Tools > Users > User types > Edit type permissions** [for selected type] > **Communications**

## Setup by BrassRing Admin/Admin+ Users

To store the content of template-based email so that it is viewable by privileged users, set the attribute **Save copy of correspondence** to **Yes** on the Communications template.

**BrassRing > Admin > Communications > Add | Edit Communication template**



The screenshot shows a configuration form for a communication template. The 'Save copy of correspondence' option is highlighted with a red box, and its value is set to 'No'. A yellow callout box points to this option with the text: 'On the Communications template, Save copy of correspondence = No by default, must be set to Yes for the content to become viewable in BrassRing.'

<b>Active template</b> <input checked="" type="radio"/> Yes <input type="radio"/> No	
<b>*Template type</b> <input checked="" type="radio"/> E-mail	
<b>*Agency</b> <input type="radio"/> Yes <input type="radio"/> No	
<b>*Sending method</b> <input checked="" type="radio"/> Manual Send <input type="radio"/> Auto Send <input type="radio"/> Auto and Manual Send	
<b>Save copy of correspondence</b> <input type="radio"/> Yes <input checked="" type="radio"/> No	On the Communications template, Save copy of correspondence = No by default, must be set to Yes for the content to become viewable in BrassRing.



# Communications – SMS Aggregation

This feature enhances the existing capability of sending Text Messages to candidates using the Short Messaging System (SMS) via IBM® Kenexa® BrassRing®.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> LDP 219	<input checked="" type="checkbox"/> BrassRing	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact our Support Team for implementation details.	

## Feature Description

The feature is integrated with Clickatell, an SMS aggregation vendor. Clickatell provides aggregation services in over 200 countries, and supports local messaging in the United States, India, Ireland, South Africa and the United Kingdom, so clients do not have to find their own SMS aggregation vendor. This is the only vendor with which BrassRing is integrated at this time.

BrassRing configuration supports multiple opt-in methods to meet the regulatory and legal requirements of different jurisdictions: double opt-in required, single opt-in required, and no explicit opt-in required.

### Double opt-in flow

In some circumstances, the double opt-in workflow is required for the US, Canada, UK, and EU countries.

In order for the BrassRing users to be able to send text messages to their candidates, they must obtain the candidates' Mobile phone number and Mobile phone country as well as the candidates' **Preference** and **Consent** to receive text messages on mobile phones. All of these settings are available on the profile page for the candidate. Submitting the profile with the required information for SMS messaging (as well other required information for saving the profile) constitutes the first opt-in step.

The candidate must complete the second opt-in step, which is to send a text message containing a client-specific keyword and short-code to BrassRing from the device added to their profile page.

A series of steps are devised and presented to the candidate when the candidates create or edit their BrassRing Talent Gateway profile. In order to opt to receive text messages, candidates should:

1. Select Text messaging as one of their preferred communication methods.
2. Provide their mobile number and country code information.
3. Give consent to receive text messages on their mobile phone from BrassRing.
4. Opt in from their mobile device by sending a text message with a set of client codes to a given number to start receiving text messages.

### Single opt-in flow

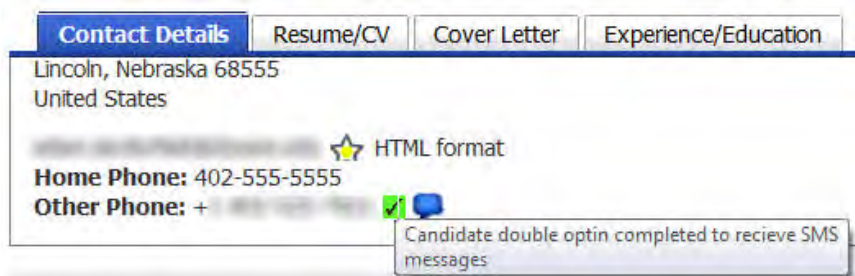
Some countries and jurisdictions require that the candidate consent once to receive text messages, in addition to providing their mobile phone number and country dialing code. They do this either by selecting the Mobile phone country or prepending the country dialing code to the phone number, which is dependent on the specific configuration, and by giving their consent to receive SMS messages.

## No explicit opt-in required

In some countries and jurisdictions, there is no regulatory requirement to obtain consent and have the candidate opt-in explicitly to receive text messages. It is possible to configure BrassRing to send text messages to candidates as long as the candidate has entered his or her mobile phone number in the **Other phone** (mobile) field. In this workflow, the candidate enters the country dialing code as part of the phone number.

## BrassRing User Experience

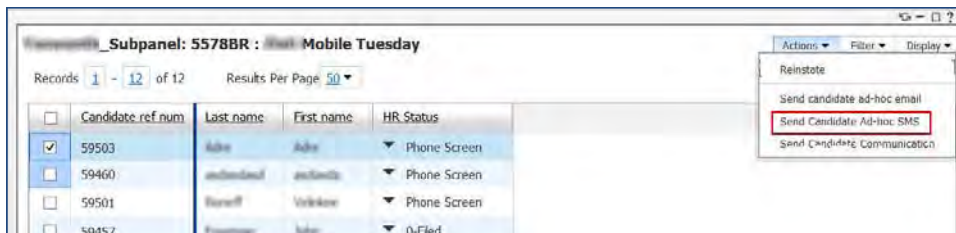
Once SMS messaging is configured and tested, BrassRing users with appropriate privileges can send text messages to candidates who consented to receive text messages. Candidates' text messaging preference is indicated on their Talent Record. A black check mark on green box and a blue message icon appear next to the **Other Phone** field when a candidate completes all the steps involved in providing the preference and consent for text messaging.



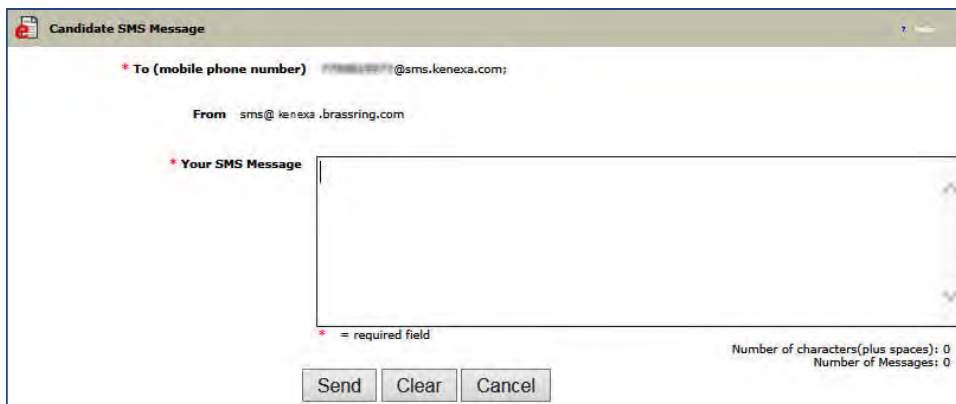
You can send ad hoc messages, or choose a communication template to send a text message (use **Send Candidate Communication** action). The following work flow describes the user experience when double opt-in method is configured (which is a requirement in the United States and some other jurisdictions).

To send ad hoc text messages:

1. Select a candidate from one of the candidate lists in BrassRing, then select **Send Candidate Ad-hoc SMS** from **Actions**.



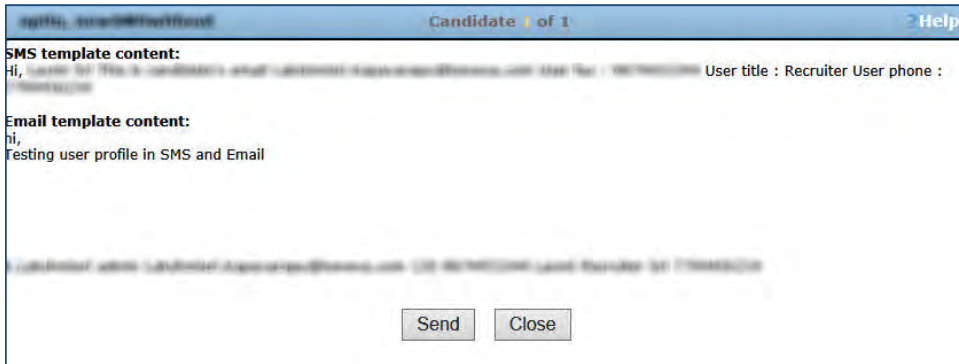
2. On the Candidate SMS Message screen, enter the SMS text message. You can't edit the mobile phone number of the candidate from this screen.



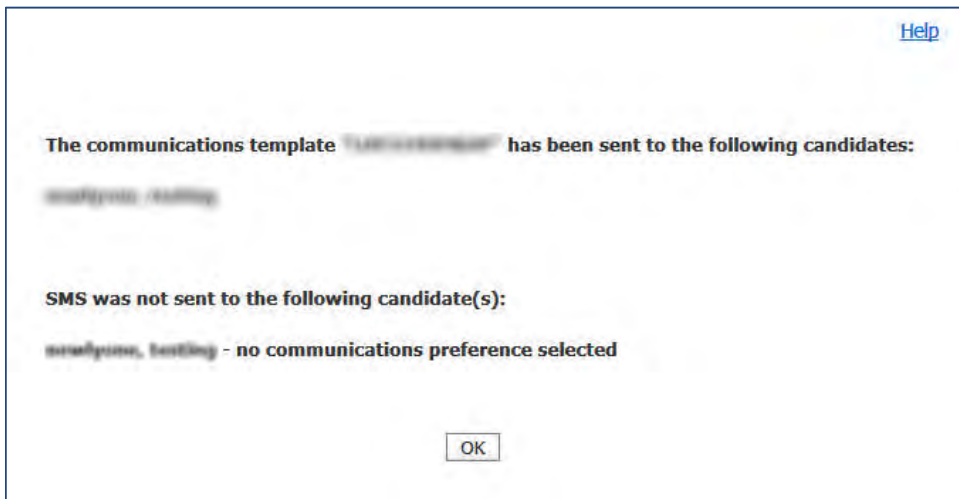
### 3. Select **Send**.

A good use for templates is to send text message and email messages simultaneously to candidates with different communications preferences. Another use is to send short texts that prompt candidates to look at more detailed email. To send template-based messages, select **Send Candidate Communication**. Depending on the type of template you select, you can send template-based communication using SMS, email, or a combination.

A confirmation screen with message content is displayed after the message is sent successfully via both email and text message.



When communication is sent via email and failed to send via SMS, the confirmation screen displays the appropriate failure message.



A log of the text messages sent to candidates is maintained on the candidates' BrassRing Talent Record Information

Action	Date	Action by	Details	Item/Type
HR Status - Updated	21-May-2014	Manager, Query ()		Current Status
Added to Folder	21-May-2014	Manager, Query ()		
HR Status - Updated	21-May-2014	Manager, Query ()		Current Status
Added to Folder	21-May-2014	Manager, Query ()		
Communication - SMS	20-May-2014	HR, Query (SR)	Status: Sent	Ad for SMS - Testing for this is candidate's email address: kumar@brs.com

Candidates' Communications History also stores a record of SMS messages.

Date sent	Folder	Size	Folder	Communication	Sent to	Type	Sent by	Status
22 May 2014	Folder	1 KB	W3 Lovers	W3 Lovers	W3 Lovers (200)	Communications - SMS	W3 Lovers (200)	Item
22 May 2014	Folder	1 KB	W3 Lovers	W3 Lovers	W3 Lovers (200)	Communications - Email	W3 Lovers (200)	Item

## Candidate Experience

Candidates must express a preference for or agree to accept SMS messages before they can receive them from BrassRing. The sign up method depends on the opt in workflow that BrassRing clients choose. Candidates can also stop SMS messages from BrassRing.

### No opt-in required

This workflow is desirable in some countries and jurisdictions where candidates use SMS messaging as their principal mode of communication.

Candidates must complete and submit their profiles with mobile phone number.

1. On the Talent Gateway or Gateway Questionnaire, enter mobile phone number in the **Other phone** field with the Country Dialing Code at the beginning. For example, candidate in Hong Kong enters +852 xxxx xxxx, where “+852” is the country code.
2. Complete the rest of the required fields on the profile page and submit it.

If the submission is successful, the candidate’s Talent Record is updated, showing that the candidate is now able to receive text messages.

### Single opt-in required

This workflow is appropriate to use with a long number and in countries that require a single opt-in step. BrassRing clients have two ways to require the opt-in.

- Preference for SMS vs. Email: Ask for the candidate’s preference to receive SMS messages or emails for short communications and alerts.
- Consent to receive SMS messages: Ask candidate to check a box indicating his or her consent to receive SMS messages.

Candidates must complete and submit their profiles with mobile phone number.

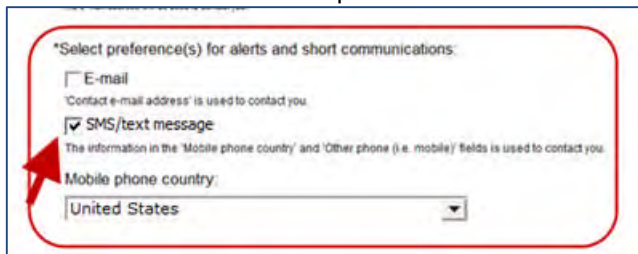
1. On the candidate profile, indicate preference or consent for SMS messages, include mobile phone number, and submit.

Upon successful submission of the profile, the Talent Record is updated to show that the candidate is able to receive SMS messages.

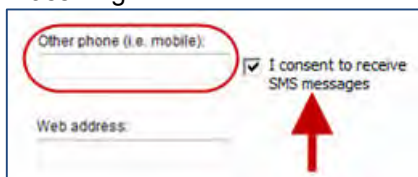
### Double opt-in required

In jurisdictions where the double opt-in procedure is required, such as the United States, candidates submit their profile with the complete information for SMS messaging as the first step to receive text messages. For the second step, they text a client code and keyword to the BrassRing short code from their mobile device.

1. Check the Communications preference check box **SMS/Text Message**.



2. Select **Mobile Phone country** from the options.
3. Provide the mobile phone number in the field with label **Other phone (i.e. mobile)** (This field may have a customized label)
4. Check **I consent to receive SMS messages** to provide consent for receiving text messages from BrassRing.



5. Submit the profile. A configurable message to the candidates indicates that they have opted for text messaging. It also provides information for the second opt-in step: a specific code and ID that candidates must text to a supplied number.
6. Send the required text message to complete the opt-in.

After sending this text message, the candidate's BrassRing Talent Record displays a blue message icon and black check mark in a green box in the contact details section, indicators that the candidate has fully opted-in for text messaging.

### Opt in from mobile device required

**Opt in from mobile device required** is another setting that can be configured for clients. If it is required, candidates must text the required keyword to the BrassRing short code to opt in. The setting ensures that the candidate enters a valid mobile phone number.

### Best Practice Recommendations

- BrassRing users should first check and confirm from the Talent Record that a candidate has completely opted-in for text messaging before trying to send a text message to the candidate.
- Pop-up messages should be configured with correct series of steps, client code, and BRUID information so that the candidates can complete the opt-in without problems.
- Text messages usually have length constraints and users should keep this in mind while drafting their text messages. There is an industry limit on message lengths of 10 messages long (that is, 10 x 140 characters for Western character encodings, and 10 x 70 characters for Unicode character encodings).

### Limitations and Known Issues

- Candidates have to complete all steps for opting-in in order to start receiving the text messages.
- Candidates have to provide their mobile phone number accurately in the Other Phone field of their Talent Gateway profile. The system does not validate whether the phone number provided is a mobile phone number and can receive text messages.
- Text messages are unidirectional. Candidates cannot reply to a text message they received from BrassRing using text message.
- BrassRing users cannot communicate with each other using text messaging from BrassRing.

- If deploying on multiple TGs, the opt in method must be the same for all of them; BrassRing does not currently support a different opt in method for Talent Gateways in different countries that may have different opt in regulatory requirements.

## How Do Clients Get this Feature?

This feature is controlled by a BrassRing Workbench client setting. Talent Gateway text customization should be configured in the required format.

Clients must obtain a subscription with a third party SMS Aggregation vendor with appropriate amount of bulk messaging credits. Currently Clickatell is the only vendor that BrassRing supports. The Web site for BrassRing clients to register is: [www.clickatell.com/partners/brassring](http://www.clickatell.com/partners/brassring).

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

# Configuration Tasks

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This section describes the tasks required to configure this feature.

1. Contact your BrassRing Support team, who will also provide Clickatell contact information.
2. [Set up a Developer's Central account with Clickatell](#) and purchase some bulk messaging credits: <https://www.clickatell.com/register/> (see next slide).
3. [Enable Workbench client settings](#).
4. [Configure Talent Gateway text customization settings](#)
5. [Configure the Gateway Questionnaire](#) with SMS messaging-related widgets (if client uses the GQ for capturing the candidate profile).
6. [Configure user type privileges](#).
7. [Configure SMS aggregation vendor settings](#) (Support Staff).
8. Configure Communications templates (BrassRing Communications Template Administrator)
9. Perform testing for each country/jurisdiction:
  - Test double/single/no opt-in procedure for each country/jurisdiction.
  - Test sending of SMS message via ad hoc, template, RAM.
  - Test opt out via UI.
  - Test STOP requests from mobile device.

Tasks labeled Workbench Self Service can be performed by certified Workbench Self Service users or by our support staff.

## Considerations

### In the United States

- You can use a common BrassRing Short Code as your sending identifier, depending on your message volume. You can also lease a dedicated short code, but it takes time to get it, is expensive, and has the most stringent regulatory requirements. Clickatell will advise you on what to do. You are under more stringent regulatory requirements when you use a Short Code. (In the BrassRing implementation, you must capture both the candidate's preference AND consent for SMS messages, and the candidate must opt in from the mobile device.)
- As an alternative, Clickatell can assign you a virtual phone number (known in the industry as a "Long Number" or "Long Code"). Long Numbers are assigned when the volume of your messaging does not exceed some threshold and your messaging is not a mobile marketing program. BrassRing messaging functionality is not a mobile marketing type of program, so a Long Number is probably appropriate for many clients.

### In or between Other Countries

- If your BrassRing deployment has Talent Gateways in countries outside of the United States on which you want to enable SMS messaging, you will be assigned a Long Number (a virtual telephone number) as your identifier and sender ID. Long Numbers are assigned when a) at least some of your messaging will be done outside of the United States; and b) when your messaging is not explicitly a mobile marketing program.
- Country and jurisdictional regulations dictate the opt-in method you should use.
- In some countries you can specify a masking number to put in a familiar country code.

## Clickatell Account (Client)

This process is subject to change by Clickatell without notice – always refer to their directions or request chat assistance if the steps differ from those listed here.

1. On Clickatell's home page, <https://www.clickatell.com>, select **Get started for free**.



2. Select **Developer Account**.
3. Select an option for **Where would you like to send messages to?** and complete the account profile information.
4. Select **Create my Account**.

## Client Settings – Workbench (Support Staff)

To enable the text messaging option, set **SMS messaging – enable** client setting to **Yes**.

Set **SMS messaging ‘From’ address** with text field for the email address client setting.

**Workbench > Select a client > Edit**

–OR–

**Workbench > Admin > Manage Clients > Edit client settings** [for selected client]

Other client and configuration settings control the opt-in methods.

- To ask for the candidate’s preference for SMS messages vs. emails, set client setting **Candidate communications preference** to **SMS**.
- To require the candidate’s consent to receive SMS messages in general, set client setting **SMS messaging – require candidate consent** to **Yes**. Customize the text label and opt-in message for this setting. If using only one of the opt-in settings, using this option is recommended practice.
- To require that the candidate opt in from his or her mobile phone, check [Opt in through mobile device is required](#) when you configure the SMS aggregation vendor rows in BrassRing. (This is where you specify your country-specific or International configuration for Clickatell.)

## Talent Gateway Text Customization – Workbench Self-Service (Tiers 1+)

New customize text option: **SMS messaging**

**Workbench > Tools > Talent Gateways > Text customization** [for selected TG] > [select Edit Profile tab on Customization page]

Default text for SMS messaging – candidate consent check box label: Send me text messages about jobs

Default text for 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)*

**IMPORTANT:** This message must be configured by the client to meet their respective region’s legal and regulatory requirements.

## Gateway Questionnaire Widgets – Workbench Self-Service (Tiers 0+)

**New GQ widget: SMS Consent**

**Tools > Gateway Questionnaires > Add new Gateway Questionnaire** / [select existing *draft*] > **Administer sections/pages > Administer widgets/ Add new widget**

While adding the SMS Consent widget to the BrassRing Talent Gateway Questionnaire, you must also add the Other phone (i.e. mobile) widget to the Gateway Questionnaire. There is a validation upon saving telling user that Other phone is required to be on the Gateway Questionnaire.

## User Type Privileges – Workbench Self-Service (Tiers 1+)

New user type privilege: **SMS – aggregation vendors**

**Workbench > Tools > Users > User types > Edit type permissions** [for selected type] > **Integrations 2**



Checking this user type privilege allows users to see a new option in the BrassRing's Admin > Communications menu. New menu option SMS Aggregation Vendors is displayed to users with this user type privilege. This menu option allows users to configure SMS Aggregation Vendor information in BrassRing.

## Vendor Setup (Support Staff or BrassRing Admin/Admin+ Users)

BrassRing Admin users with access to the SMS Aggregation Vendors privilege can Add/Edit and configure the SMS Aggregation vendor options.

BrassRing Path: **Admin > Communications > SMS Aggregation Vendor**



The Administer SMS Vendors screen lets users add and edit the vendor information. Users can configure whether the candidate must follow the single opt-in flow or the double opt-in flow.

**\* SMS aggregation vendor** Clickatell

**Opt in through mobile device is required**

**\* Countries** Antarctica

**\* API ID** 68678768

**\* Username** asdfsdfdfdfgfdg

**\* Password** \*\*\*\*\*

**From** dfgdgfdg

\* = required

Save Clear Cancel

**Opt in from mobile device required** requires candidates to text a required keyword to the BrassRing short code to opt in. The setting ensures that the candidate entered a valid mobile phone number.

- You can configure different rows per country/jurisdiction and require opt in from mobile device in some locations but not others.
- If none of the countries in which you are doing SMS messaging require the candidate's explicit permission, you can enable this setting without turning on the SMS preference or SMS consent settings.
- You can use it and turn on one of the SMS preference or SMS consent settings.

## Automation

Clients can also configure RAM/Automation Manager to send SMS messages:

- When the client setting **SMS messaging – enable** is turned on, the **Add | Edit communications template** pages include the SMS template in addition to the email template.
- SMS message templates can be of the **Auto Send** type (i.e., they are consumed by RAM/Automation Manager).
- Clients should consider this implementation carefully because they do not want to send an excessive number of text messages to candidates.

# Data Insight Tool – Form ID Filter Criteria

BrassRing Data Insight Tool users can select a new Form ID field for reports.

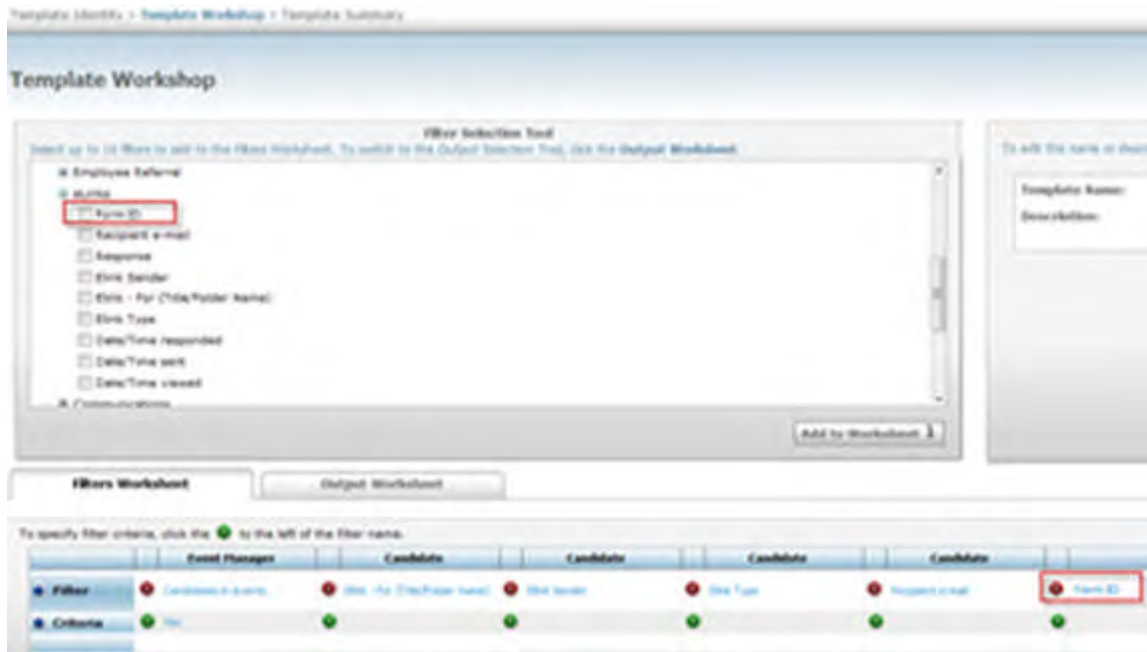
IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> RDP 1085	<input checked="" type="checkbox"/> Data Insight Tool	
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic – see details below.	

## Feature Description

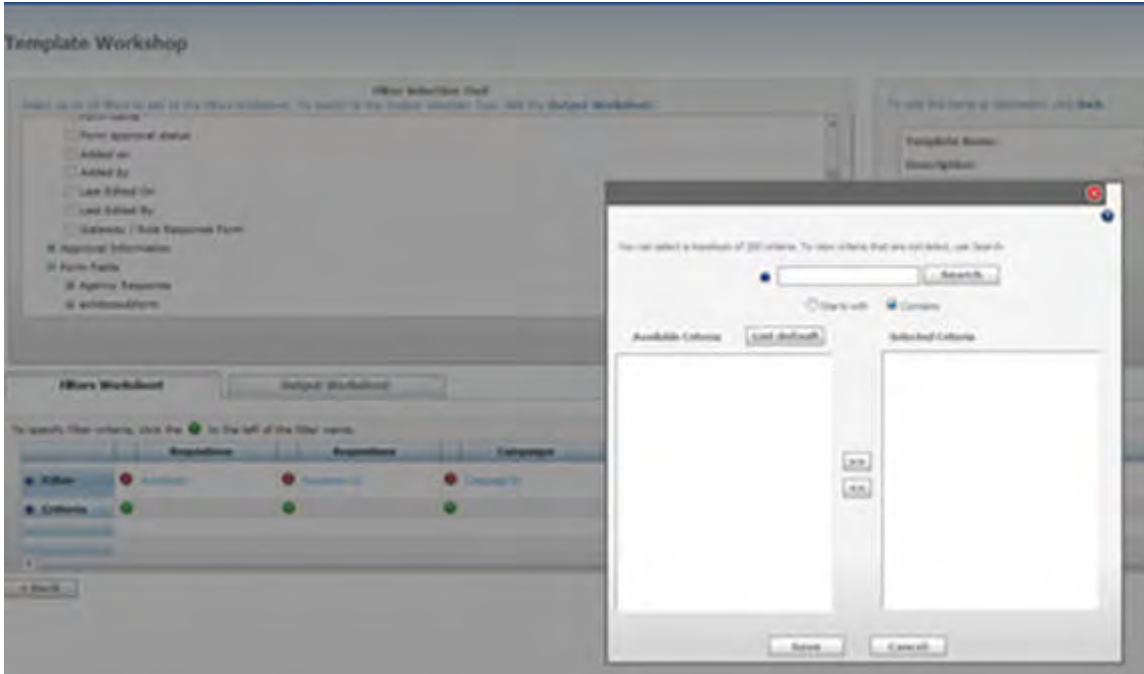
In order to enhance reporting of Candidate forms and their corresponding eLinks, a new field, Form ID, is now available to be added to the Filters Worksheet as well as the Output Worksheet under the eLinks section. This field is available for use to all Data Insight Tool users.

## BrassRing User Experience

The new eLink **Form ID** field appears in the **eLinks** section of the Candidates tree in both the Filters Worksheet and the Output Worksheet tabs. Inclusion of this new field allows users to view the association between Candidate Forms and candidate eLinks; thereby eliminating duplication of records in the output report.



When users add Form ID on the Filters worksheet, they also select the criteria. After a user selects the criteria button on the Filters Worksheet; a pop-up window displays. The user can then select one or more Form ID from this window.



Although the user can select up to 200, selecting more than 50 criteria delays report generation (a message cautions users about this when they select more than 50).

In an Output Worksheet, users must select a Form Name with for any selected Form ID.

### Best Practice Recommendations

Keep the number of selected Form ID values less than 50. This limit of 50 applies to all other existing fields in the Data Insight Tool.

### How Do Clients Get this Feature?

This feature is available automatically without configuration.

# Event Manager - Enhancements

Several new features were added to Event Manager for Release 14.0. These features are also documented in the *Event Manager Administrator's Guide* and *Event Manager User's Guide*.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> LDPs: 147, 229, 230, 231, 232, 233, 242 RDPs: 1052, 1053, 1054	BrassRing Talent Gateways Data Insight Tool	Workbench Self-Service
<b>Visible Changes</b>	Yes – some new changes are documented in the <i>Visible Changes</i> document sent for each release build.	
<b>How do I get this feature?</b>	Some features require configuration – please see individual features for configuration details. If configuration is required, contact our Support Team for implementation details.	

## Feature Description

This release of Event Manager introduces new features designed to support a more integrated BrassRing/Event Manager workflow. Event Manager Administrators (EM Admins) and Event Manager Users (EM Users) can now access the following feature enhancements:

- [Event Save Redesign](#) – introduces a new workflow when users save events across a series of events
- [EM Assessor Scheduling and Event Batch](#) – enables data capture and reporting using Data Insight Tool (DIT)
- [Event Series Edits](#) – enables users to edit a single event within an Event Series or all events within a series
- [Basic Events](#) – provides a way to easily create simple, basic events without complex configuration
- [Timeslot Usability](#) – allows users to create multiple time slots for events during initial event configuration
- [Event Team Usability](#) – provides search and add functionality that includes adding multiple Event Team Members simultaneously during Event creation
- [Extending Event Series](#) – allows users to extend event series from the Event Summary page retaining the event series configuration settings
- [Add/Edit Forms](#) – allows Event Manager users to access BrassRing Add/View Form functionality from within Event Manager
- [Save as New](#) – enables users to save existing Event and Message (communication) Templates as new
- [Candidate Communication History](#) – displays all Event Manager communications history in Talent Gateways
- Other [minor improvements](#) were made to enhance user experience. They were originally noted in the visible changes document, and are described in that section of this document for your convenience.

## Event Save Redesign (LDP 229)

The Event Save Redesign feature supports a more stable user experience by enabling EM Admins/Users to save and edit Events without risking a save failure due to timeout issues. This feature moved some configuration details from the event configuration page to the initial page of event creation.

This feature is available for both single events and events within a series. On the Events: New Event page EM admins/users can now specify event type (single or a series) and configure some event variables before continuing to the more detailed event configuration page.

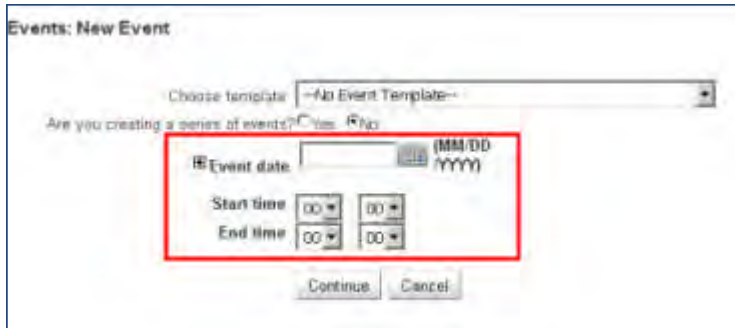
## Event Manager Administrator/User Experience

### Creating New Single Event

EM admin/user navigates to:

1. **Events > Scheduled Events > New > New Event > Events Summary> Actions> New Event.**

Events: New Events page launches. Default setting of No for Event Series displays.



The screenshot shows the 'Events: New Event' form. At the top, there is a 'Choose template' dropdown menu set to '--No Event Template--'. Below it, the question 'Are you creating a series of events?' is followed by radio buttons for 'Yes' and 'No', with 'No' selected. A red rectangular box highlights the 'Event date' field, which includes a date picker icon and the format '(MM/DD/YYYY)'. Below the date field are 'Start time' and 'End time' fields, each with two dropdown menus for hours and minutes. At the bottom of the form are 'Continue' and 'Cancel' buttons.

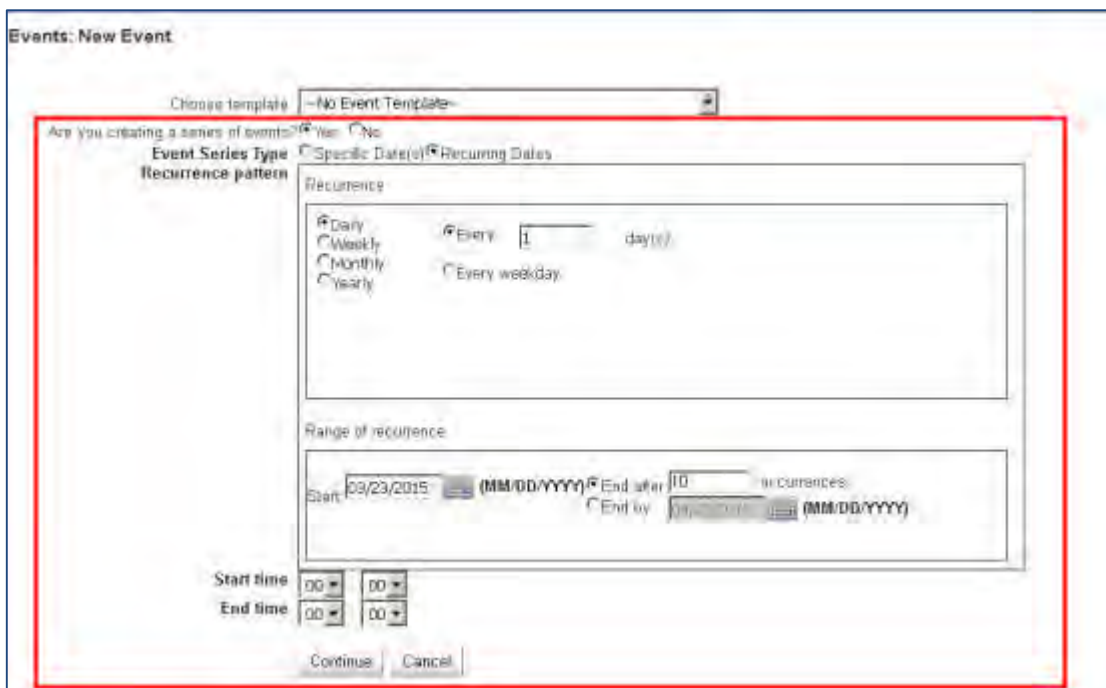
2. Selects a single event occurrence and begins the configuration process by selecting a date and time period for the event.
3. Selects **Continue** and configures event attributes on the event configuration page.

### Creating Event for a Series of Events

EM admin/user navigates to:

1. **Events > Scheduled Events > New > New Event > Events Summary> Actions> New Event.**

Events: New Events page launches. Default setting of No for Event Series displays.



The screenshot shows the 'Events: New Event' form with the 'Event Series Type' and 'Recurrence pattern' sections highlighted by a red box. The 'Are you creating a series of events?' question is still present, with 'No' selected. Under 'Event Series Type', the 'Specific Dates' radio button is selected, and the 'Recurring Dates' radio button is also selected. The 'Recurrence pattern' section includes radio buttons for 'Daily', 'Weekly', 'Monthly', and 'Yearly', with 'Daily' selected. There are also options for 'Every 1 day(s)' and 'Every weekday'. The 'Range of recurrence' section has a 'Start' date of '03/23/2015' and an 'End after' field set to '10' occurrences. There are also 'End by' and 'End on' date fields. At the bottom, there are 'Start time' and 'End time' fields with dropdown menus, and 'Continue' and 'Cancel' buttons.

2. Selects **Yes** for **Are You creating a series of events?** Begins the event series configuration process by selecting either a set of specific dates for the events or selects event dates within a series.
3. Selects **Continue** and configures event attributes on the event configuration page.

After EM user selects **Continue**:

EM users land on the Event Configuration page. In support of Event Redesign, the following Event Configuration page elements have been altered.

- **Tab Components**

Tab components now save information as soon as the **Save** is selected on each individual tab.

- **The Add Activity Pop-up screen**

The Continue option is now changed to **Save** to convey the message that the new activity saves to the event.

- **The Add/Edit Assessor Shift Pop-up screen**

The OK option is changed to **Save** to convey that the assessor shifts are saved to the event.

- **Availability Events page**

The Assessors tab, Assessor shift tab, and Time slots tab are now available on the second page of the New Events page.

- **Event Configuration Page Component Grids**

The following components on the Event Configuration Page now display a new table grid format:

- Time Slots
- Assessor Shifts
- Parallel Activity Groups
- Rooms
- Activities
- Assessors
- Candidates
- Event Team
- Attachments.

- **Miscellaneous**

The previous message of No parallel activity groups found that launched if no parallel groups existed now displays No Records found.

There is a change in the branding image upload process. Previously, the user browsed, selected the image, and then selected **Confirm** and **Upload**. Now when a user browses and selects an image, it automatically uploads.

Previously, when users deleted rooms from individual time slots, only the room/time slot relationship was removed. Now when a room has no relationship with a time slot, it is deleted.

## How Do Clients Get this Feature?

This feature enhancement is available without configuration.

## EM Assessor Scheduling and Event Batch Reporting in DIT (LDP 147)

This feature introduces the ability to configure and generate DIT reports on the following Event Manager data:

- Assessors commitments and schedules for selected events, including timeslots
- Assessors cancellations for selected events, including timeslots
- Events with configured event batches (RAM and event batches work together to generate automatic candidate event invitations based on HR statuses)

Being able to report on an event's association with an event batch is important when we have events that support multiple purposes and need to ensure that their configuration is correct.

To support this new functionality, the following is a listing of new fields and sub-sections available in DIT. Unless otherwise noted, these listed variables are fields:

- Event Series Name
- Assessor Shortage
- Assessor Shift – A new subsection containing the following fields:
  - Assessor shift name
  - Start date/time
  - End date/time
  - Start date/time in UTC
  - End date/time in UTC
  - Required assessors
  - Assessor shortage
- Assessors – A new subsection containing the following fields:
  - Email
  - Location
  - Business group
  - Specialty
  - Default time zone
  - Preferred language
  - Active
  - Hiring manager
  - Recruiter
  - BrassRing user
- Assessor History – A new sub-subsection containing the following fields:
  - Date
  - Added by
  - Note
- Event Batch – A new subsection
  - Name
  - HR status
  - Invite to

### Event Manager Administrator/User Experience

When an Event Manager Admin/User navigates within the DIT Template, under the Event Manager tree in both the 'Filter Selection Tool' and the 'Output Selection Tool', the following are added/updated:

- Event Series Name (only populates if event is part of an event series)
- Assessor Shortage
- Assessor Shift – subsection

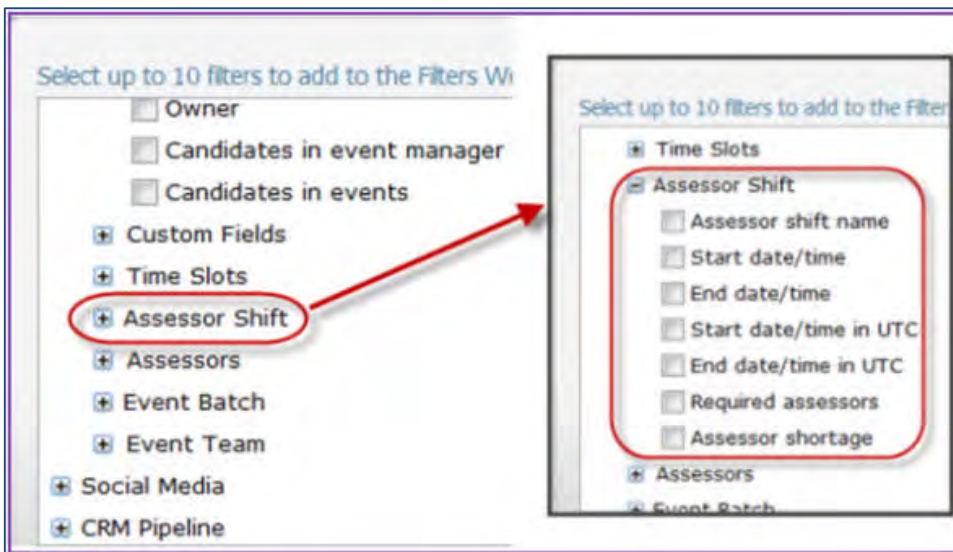


- Assessors subsection
- Assessor History sub-subsection
- Event Batch subsection

### Assessor Shift

The Assessor shift section displays fields related to each assessor shift:

- Assessor Shift Name
- Start Date/Time
- End Date/Time
- Start Date/Time in UTC
- End Date/Tim in UTC
- Required Assessors
- Assessor Shortage



### Assessors

Assessors subsection now contains the following fields:

- Name
- E-mail
- Location
- Business Group
- Specialty
- Default time zone
- Preferred language
- Active
- Hiring Manager
- Recruiter
- BrassRing user

### Assessor History

Assessor History subsection contains all assessor system transactions such as self-schedule invitations, event registrations, sent emails, event schedules, event cancellations, and event reminders. The Assessor History fields include:

- Date
- Added By
- Note

### Event Batch

Event Batch subsection includes Event Batch attributes:

- Name
- HR Status
- Invite to

### How Do Clients Get this Feature?

This feature enhancement is available without configuration.

## Event Series Edits (LDP 230)

The Event Series Edits feature allows EM admins/users to edit specific event attributes across all events within an event series by editing just one of the events within that series. This new option exists side-by-side with the existing option for EM admins/users to edit only one event in a series.

For example, if an EM admin/user needs to change the location of an event series, the admin/user can access one event within the series on the Edit Event page, make that one change, select **Save to Event Series**, and select **OK** on the Alert dialog box. The Alert dialog box displays the intended attribute changes for all events within that series.

Alternatively, if an EM admin/user needs to change an event description for a single event within an event series, the admin/user can access that one event, make the assessment change, and select **Save to Single Event**. This procedure saves the change only for that single event.

### Save to Event Series – Allowed Attributes

Attributes on the Edit Event page that *can* be applied across an event series:

- Event Name
- Status
- Lock registration
- Branding image
- Candidate registration page
- Internal candidate form
- Event visibility
- Description
- Default time zone –
- Location
- Select/enter location details – City, State/Province/Region, Postal code, Country
- Owner
- Program
- Region
- Business Group
- Recruiter
- Fields in the following tabs
  - Messages
  - Valid Outcomes (Outcomes add/delete can be applied across series but not display order)
  - Event Team

- Custom Fields

## NOT Allowed Save to Event Series Attributes

Because these following attributes require an event build, they *cannot* be applied across an event series but they can be edited for single events.

- Event Date
- Event Start Time
- Event End Time
- Fields in the following tabs:
  - Time Slots
  - Assessor Shifts
  - Parallel Activity Groups
  - Rooms
  - Activities
  - Assessors
  - Candidates
  - Attachments

## How Do Clients Get this Feature?

This feature enhancement is available without configuration.

## Basic Events (LDP 231)

The Basic Event feature enables clients to create simple, basic events without complex configuration normally required when creating events by using a basic event template. The basic event template attribute allows EM admins to create events templates for basic events. EM users can then use the basic event template to create basic single events or basic event series events.

## Event Manager Administrator Experience (Basic, Single Event)

EM Admin with the appropriate privileges wants to create a new basic, single event. The EM admin wants the system to take care of some of the obvious field values.

EM administrator logs into Event Manager and lands on the Event Summary page:

1. Selects **Admin > Templates > Event Template**.

The Admin: New Event Template page launches.

2. Completes the Template Name (Hiring Interview) and Description fields and selects the radio button for **Basic** in the Event type (attribute) category.  
The page refreshes with the updated basic template.

Admin: New Event Template

template name: Hiring Interview

Description: Hiring Interview for weekly interviews with potential candidates.

Event Type:  Standard  Basic

Advanced Self Scheduling:  None  Assessor Shifts

Lock Registration: 0 (Apply prior to the event date)

Learning Inside: [Review](#) | [Go to the selected course and Lesson page](#)

Candidate Registration Page: HR Registration Page

Internal calendar (org): None

Default Time Zone: (GMT-05:00) Eastern Time (US & Canada)

Include description:

Include location:

Include position details:

Include event owner:

Include recruiter:

Include program:

Include region:

Event Business Group:

Public Event Type:

Active:

Total slots: 0 (total from new slots)

Valid Differences

Default Event Team

Time Slots

Messages

Save Cancel

3. Completes only the event fields required for a basic event. In this instance, those fields are the Location and Active.
4. Selects **Save**.
5. Navigates to the Event Summary page.
6. Selects **Action > New**.  
The New Event page launches.

Events: New Event

Choose template: Hiring Interview

Are you creating a series of events?  Yes  No

Event date: 04/04/2015 (DD/MM/YYYY)

Start time: 09:00

End time: 10:00

Continue Cancel

7. Selects the newly created Basic Template, and completes the event type, Event Date, and Event Start and End time fields.
8. Selects **Continue**.  
The Event: New Event page launches:

**Events: New Event**

Event Template Hiring Interview

Event name Early April Interview Events

Status Please Select

Slots remaining 0 (total from time slots)

Location  Req Location  Event Manager  Remote  Other

Select/Enter Location Details

+ Time Slots

+ Event Team

Close Save to Single Event

9. Completes required fields for all the event fields and selects **Save to Single Event**.

### Event Template for Single Events

Selecting the basic event type attribute when creating an event template hides the Assessor Self-Scheduling Availability option and excluding location and active, does NOT select these options as defaults:

- Include description
- Include location details
- Include event owner
- Include recruiter
- Include program
- Include region
- Include business group
- Public event type
- One-one interview event type
- All other fields/attributes remain as is

### Event Manager Administrator Experience (Event Series)

EM admins view a simplified New Event page when configuring events for basic events in a series using a basic event template. Creating events using the basic event template for single events provides a streamlined workflow.

EM user lands on Event Summary page and:

1. Select **Actions > New** and selects a basic event template.
2. Selects **Yes** radio button for **Series of Events**.  
The event configuration page refreshes and displays basic event information.

3. Completes required information and selects **Continue**.

4. Completes event fields and selects **Save to Event Series**.

### Event Template for Event Series

When selecting the basic event type attribute for event template for an event series, the initial New Event page does not change but the second New Event page displays with the following changes:

- Event Name defaults to the same value as the Event Template Name.
- The Recurring Event Alert option is hidden for event series
- The Minimum Available Slots Alert is hidden and inherits the system settings (for event series).
- The following fields are hidden and inherit their values from the event template:
  - Lock Registration Days
  - Branding Image
  - Candidate Registration Page
  - Internal Candidate Form

- Default Time Zone
- The Event Visibility field is hidden and inherits the value from the system setting.
- The following tabs are hidden:
  - Parallel Activity Groups
  - Rooms
  - Activities
  - Candidates
  - Attachments
  - Valid Outcomes
  - Messages
- The Assessors tab displays only if the event template is configured as an Assessor Shift event. If Assessor Self-Scheduling is none, then the Assessors tab is hidden.

### How Do Clients Get this Feature?

The new event type attribute on the Event Template page is available without configuration.

## Timeslot Usability (LDP232)

Timeslot Usability introduces two new event fields that allow EM admins to add single or multiple time slots to event templates during template configuration. The two new event fields are No. of time slots and Time slot duration. Using these new template fields EM admins can define how many times slots per time slot duration an event requires.

For example, if an EM admin wants to create an event with duration of eight hours and assign eight time slots to that event duration, they can do all timeslot configuration during the event template creation or editing process.

These event template can be accessed on the following pages within Event Manager:

- Event Template: New Time slot
- New/Edit Event Page; New Time Slot
- New Time slot pop up window on the Event created using the Save as New action
- New Time slot page on the Edit Event Template page created using the Save as Template action

In other words, EM users can also access this feature functionality when creating or editing existing events.

### Event Manager Administrator Experience

EM Admins with the appropriate privileges wants to create a new event template with multiple timeslots. Although this workflow demonstrates the functionality when creating an event template, EM users can also access these two event new event fields when configuring events.

EM administrator logs into Event Manager and lands on the Event Summary page:

1. Selects **Admin > Templates > Event Templates**.
2. Selects New
3. Completes all event template fields required.
4. Selects plus (+) symbol on Time Slots and selects **Add**.

The **Event Templates: New Time Slot** page launches.

5. Completes time slot name field, Max Candidates field, Start and End Time, Time slot duration.
6. Select radio button for **Multiple Time Slots**.

When the New Time Slot is created, the system calculates the number of time slots needed to comply with the event start and end time, and the time slot duration and automatically add the timeslots to the event template.

7. Selects **Save**.

The Event Template redisplay and when EM admin selects Time slot us (+) symbol, the automatically configured time slots display.

Select	Name	Start time	End time	Max candidates
<input type="checkbox"/>	Candidate Interviews	08:00	08:30	6
<input type="checkbox"/>	Candidate Interviews	08:30	09:00	6
<input type="checkbox"/>	Candidate Interviews	09:00	09:30	6
<input type="checkbox"/>	Candidate Interviews	09:30	10:00	6
<input type="checkbox"/>	Candidate Interviews	10:00	10:30	6
<input type="checkbox"/>	Candidate Interviews	10:30	11:00	6
<input type="checkbox"/>	Candidate Interviews	11:00	11:30	6
<input type="checkbox"/>	Candidate Interviews	11:30	12:00	6

8. Completes remaining event template fields and selects **Save**.

## How Do Clients Get this Feature?

This feature functionality is available without configuration.

## Event Team Usability (LDP 233)

Event Team Usability allows EM admins/users to search for and add multiple event team members when creating or editing event templates or events. Event team member search options are by user type or organization group.

This new Event Team search and add functionality is available on the following pages:

- New/Edit Event Template pages
- Save as New Event (Templates page)
- Save as New Event

## Event Manager Administrator Experience

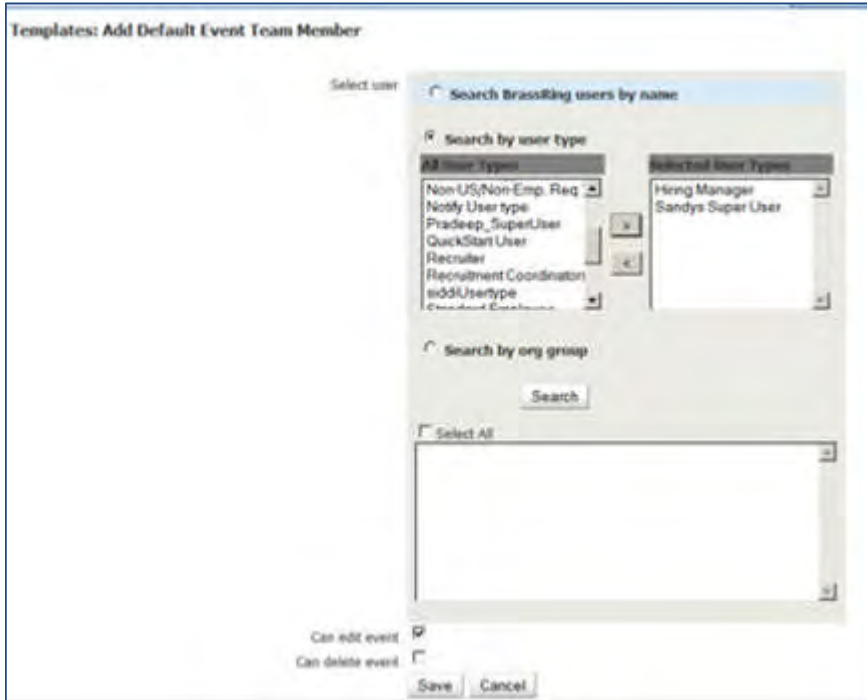
EM Admin with the appropriate privileges wants to create a new event template and add multiple event team members. Although this workflow demonstrates the functionality when creating an event template, EM users can also access this functionality when creating or editing events.



EM administrator logs into Event Manager and lands on the Event Summary page:

1. Selects **Admin > Templates > Event Templates**.
2. Selects **New**
3. Completes all event template fields required.
4. Selects plus (+) symbol on Default Event Team and selects **Add**.

The **Templates: Add Default Event Team Member** page launches.



5. Selects radio button for **Search by User type** selection box and moves user types from left to the **All User Types** selection box.
6. Selects **Search**.

Search results selection box populates with user type search results.

7. Holds down **Cntl** and selects multiple users.
8. Select **Save**.

Event Template page redisplay.

9. Selects **plus (+) symbol** on **Default Event Team**.
10. The Event Template redisplay and when EM admin selects Default Event Team plus (+) symbol, the automatically configured event team members display.

Select	Name	Can Edit	Can Delete
<input type="checkbox"/>	VALESCC James T	✓	
<input type="checkbox"/>	Varenti Jeremy S	✓	
<input type="checkbox"/>	Van Hardin John	✓	
<input type="checkbox"/>	VanderWaal Albert	✓	
<input type="checkbox"/>	VARGAS Maria	✓	

11. Completes remaining event template fields and selects **Save**.

## How Do Clients Get this Feature?

This feature functionality is available without configuration.

## Extending Event Series – (LDP 242)

Extending Event Series allows EM users to add events to an existing series of events via an Action, **Extend Event Series**, on the Event Summary page.

On the Event Summary page, when an EM user selects an event within an event series and selects **Action > Extend Event Series**, the **Event: New Event** dialog box launches. Users can then create new events within the event series using the:

- Selected event's attributes.

This option adds the new event to the event series and applies the new event's configuration changes across all events in the series. Configuration changes from the event template are NOT used.

- Edit More** option. Edit More opens the selected event and allows EM users to edit additional event attributes and save it as new and includes options to copy assessors or candidate slots to the newly created event.

**Edit More** option allows EM user to create events within the series with a configuration that is not applied across the event series extension.

## Event Manager Administrator Experience

EM administrator logs into Event Manager and:

- Admin > System > General.**  
System General Page launches.
- Selects the Yes radio button for **Extend Event Series from Event Summary**.



- Selects **Save**.

Event Summary page launches (landing page).

## Event Manager Administrator/User Experience

On the Event Summary page, user:

- Selects an Event within an Event Series.
- Selects **Action > Extend Event Series**.  
The **Events: New Event** dialog box launches.



EM user can make changes for the event using the Events: New Event dialog box OR user can select Edit More to make additional changes to the new single event. Selecting the **Edit More** option makes changes that impact only that one event within the event series.

3. Selects fields as required for the extended event. If admin just wants to extend existing event series, admins can just adjust range of recurrence.

**Copy Assessor:** Admin can copy the scheduled assessors from the selected event to the newly created events for the event series

**Copy Candidate Slots:** Admin can populate the Max candidates per time slot value from either event template or selected event, or set to 0. (This option is not available for selection for Availability Only events. Availability Events are strictly for gathering assessor availability.)

**Event Series Type:** Choices are Specific Dates or Recurring Dates.

**Recurrence Pattern:** Choices are Daily/Weekly/Monthly/Yearly, Numeric value for Every \_\_\_ weeks and Days of the week when recurrence should occur.

**Range of recurrence:** Start and End Date values.

If admin just wants to extend existing event series, admins can just adjust range of recurrence.

4. (Optional) Selects Edit More to launch the Event: Edit Event page to edit additional event attributes.
5. Select **Save to Event Series**.

## How Do Clients Get this Feature?

This feature is enabled by an Event System General setting, **Extend Event Series from Event Summary**. EM administrators configure the Systems General setting.

## Add/Edit Forms (RDP 1052)

This feature allows EM Assessors to access the BrassRing Add/View Form functionality on the View Candidate pages within Event Manager. This functionality enables Assessors to add or edit BrassRing forms and to save those forms to the candidate's Talent Record in BrassRing.

For example, an Assessor logged into Event Manager can access the View Candidate Page before, during, and after an interview to make notes about a candidate. During this process, Assessors can now select **Add/View Forms** in the Scoring tab section of the View Candidate page to access the forms list for the candidate. From this list, Assessors can add, edit an existing form, eLink a form, or delete an existing form. When the Assessor adds edits or saves a form, the form is saved to the candidate's forms list in BrassRing.

The View Candidate page and the associated Scoring tab are available in the following work flows:

- Event Roster
- Event Summary
- Event Schedule > Edit Participants
- Candidate Search > Search Scheduled Candidates
- Scheduled Candidates
- Assessor Scheduling > My Schedule > People button

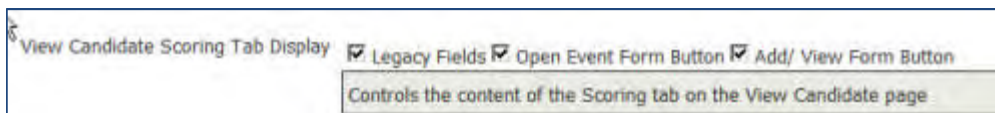
Considerations when using this feature:

- All BrassRing form access privileges are enforced. Assessor must be BrassRing users with user type privileges in order to access the forms.
- Candidate records must be associated with a specified Event Manager event.
- The four form categories are:
  - One per candidate
  - Multiple per candidate
  - Single per candidate/ req combination
  - Multiple per candidate/ req combination
- Based on the privileges, all four categories of forms display to EM/BR users with the following restrictions:
  - If the candidate has a req association, all four categories of forms are available for use.
  - If the candidate does not have a req association, only one per candidate and multiple per candidate forms are allowed.

## Event Manager Administrator Experience

EM administrator logs into Event Manager and selects:

1. **Admin > System > General.**  
System General Page launches.
2. Scrolls to the **View Candidate Scoring Tab** and selects the checkbox for **Add/View Form Button**.



3. Selects **Save**.



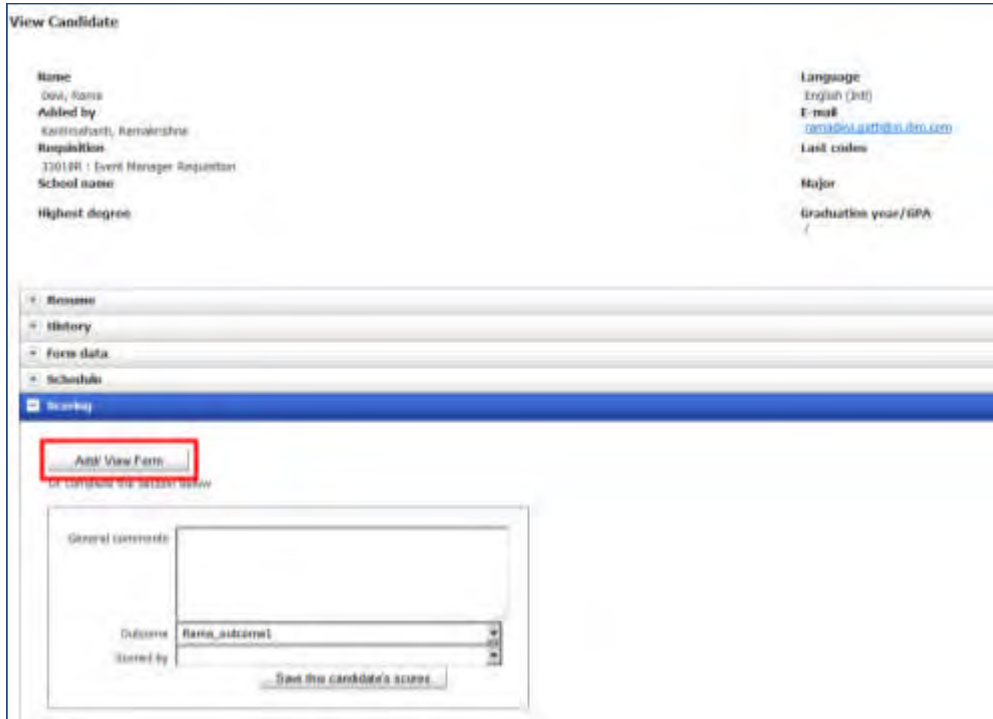
Previously, the View Candidate Scoring Tab displayed three options: Legacy Fields, Open Event Form Button, and Open Event Form Button and Legacy Fields.

For existing clients, if the “Both...” value was saved, the individual values “Legacy Fields” and “Open Event Form Button” are now both automatically checked.

## Event Manager Administrator/User Experience

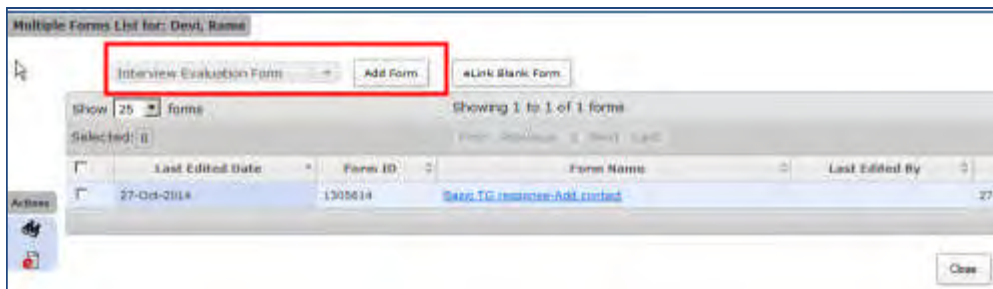
Assessor logs into Event Manager and navigates to the Event Roster page.

1. Selects a candidate's hyperlink name in the Event Roster.  
View Candidate page launches.



2. Selects **Add/View Form**.

The Candidate's Multiple form list launches.



3. Selects an Interview Evaluation Form type from the drop-down list and then selects **Add Form**.

The Interview Evaluation Form launches.

4. Completes all form fields.
5. Selects **Save**. Other options are: **Save As Draft/ Clear/Close**.

Drafts are saved for six months from the date of the last edit.

The saved Interview Evaluation Form displays in the form list, accessible from the candidate's Talent Record via the ribbon element, **Forms: Add/View** in BrassRing and on the View Candidate page in the Scoring Tab in Event Manager.

	Last Edited Date	Form ID	Form Name	Last Edited By	Date Added
<input type="checkbox"/>	02-Apr-2015	1306695	Interview Evaluation Form - 130188-Event Manager Requisition		02-Apr-2015
<input type="checkbox"/>	27-Oct-2014	1305614	Blank TG response-add contact		27-Oct-2014

## Limitations and Known Issues

Event Manager Assessors must be BrassRing users with appropriate user privileges to access this functionality.

## How Do Clients Get this Feature?

This feature is enabled by an Event Manager System > General setting, **Add/View Form** checkbox on the View **Candidate Scoring Tab**. EM administrators configure the Systems General settings.

## Save as New functionality (RDP 1053)

This feature introduces the Save as New functionality for Event Manager Message and Event Templates.

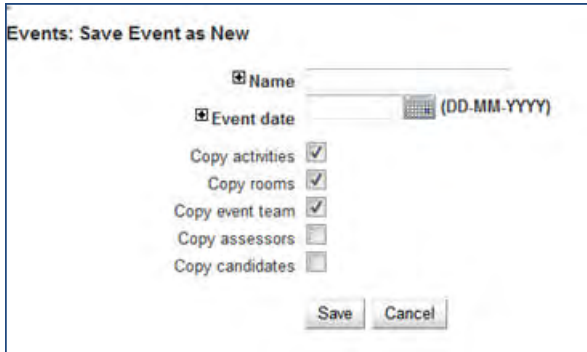
When a message or event template is Saved as New:

- The default Message or Event Template name defaults to Copy of <<selected template name>> and is editable.
- If the original template contains required fields, the Save as New template retains those required fields. If the Save as New Event template is edited and now contains Assessor Shifts, EM users must also add Assessor Shifts to the event.

## Save as New – One-on-One Interview Type Event

If an EM user creates a new event from the One-on-One Interview Type event using the Save as New action, then the New Time Slot page for the new event hides the 'Max candidates' field.

Default values for Max candidate per time slot and 'Slots Remaining' per time slot for the new event depend upon the selection of Copy assessors and Copy candidates fields on the Events: Save Event as New dialog box when creating the new event from the selected event.



The screenshot shows a dialog box titled "Events: Save Event as New". It has the following elements:

- A text input field for "Name".
- A date input field for "Event date" with a calendar icon and the format "(DD-MM-YYYY)".
- Five checkboxes:
  - "Copy activities" (checked)
  - "Copy rooms" (checked)
  - "Copy event team" (checked)
  - "Copy assessors" (unchecked)
  - "Copy candidates" (unchecked)
- "Save" and "Cancel" buttons at the bottom.

If the user selects Copy assessors checkbox from the Events: Save Event as New dialog box and does not select the Copy candidates checkbox, then the new One-on-One Interview event configuration has:

- Assessors scheduled per time slot/assessor shift in the selected event copied over to the new event.
- Max candidates and Slots remaining values per time slot are equal to the number of the assessors scheduled for the time slot and are saved in the database accordingly.
- Slots remaining value for the event are equal to the total of Max candidates value for all of the time slots for the event and are saved accordingly.

If the user selects 'Copy candidates' checkbox from the Events: Save Event as New dialog box, then the Copy assessors checkbox is selected by default and grayed out until the user unselects the Copy candidates checkbox. When the user unselects the Copy candidates value, then the Copy assessors checkbox becomes active but remains as selected until the user deselects it.

The newly created One-on-One event with Copy candidates and Copy assessors selected configuration contains:

- Assessors scheduled per time slot/assessor shift in the selected event copied to the new event.
- Max candidates value per time slot copies from the selected event to the new event and is saved.
- Slots remaining per time slot as well as for the entire event copies from the selected event to the new event and is saved.
- Candidates scheduled per time slot in the selected event copied to the new event.

If the user does not select either Copy candidates or Copy assessors checkboxes, then the new One-on-One Interview event configuration has:

- Max candidates value for the time slots defaults to 0 as assessors and candidates from the selected event are not copied over to the new event.
- Slots remaining per time slot and event display and save in the database as 0 by default.

## Event Manager Administrator/User Experience – Save as New Message Template

EM User navigates:

1. Navigates to **Admin > Templates > Message Templates**.
2. Selects an existing Message Templates and selects Save as New.

**Admin: Edit Message Template** page launches.



The Template name Copy of <<selected template name>> displays by default in the newly saved as template.

3. Edits the Message Template name.
4. Edits or retains existing Message Template selections.
5. Selects **Save**.

The Message Template is saved as a new Message Template.

## Event Manager Administrator/User Experience – Save as New Event Template

EM User navigates:

1. Navigates to **Admin > Templates > Event Templates**.
2. Selects an existing Event Templates and selects Save as New.

**Admin: Edit Event Template** page launches.

The Template name Copy of <<selected template name>> displays by default in the newly saved as template.

3. Edits the Event Template name.
4. Edits or retains existing Events Template selections.
5. Selects **Save**.

## How Do Clients Get this Feature?

This feature functionality is available without configuration.

## Candidate Communication History (RDP 1054)

Candidate Communication History introduces functionality that allows candidates to view all Event Manager related candidate communications on their Talent Gateway communication history page. This functionality extends the ability to view Event Manager communications in Event Manager on the View Candidate page.

The following candidate communications can now be viewed on a candidate's Talent Gateway Communication History page:

- Candidate Invitation (manual and event batch)
- Candidate Confirmation
- Candidate Reminder
- Copied to Event
- Moved to Event
- Send to Event Manager
- Send Email to candidate (via scheduled candidates, unscheduled candidates, candidate search, Edit event page > candidates tab)
- Send notification to candidate (via Edit event page > save to event series > notify participants)

For the work flows (Copy/ Move/ Send to Event Manager), emails sent to candidate display in Communications History when:

- The setting **Automation for manually scheduled candidates** is set to YES.
- The event configuration has confirmation message template configured for "**Select message template for candidate confirmation** and **Select message template for candidate reminder**."

The Talent Gateway customization setting **Days of History to Display** controls the number of days the history display is supported for all Event Manager Candidate communications.



## Candidate Experience

Candidate logs into their BrassRing profile:

1. Selects Communications History.



Candidate's communication history launches and includes Event Manager communications.



2. Candidate selects highlighted subject line to view content of each communication. If registration links were originally sent in the communication, those links are active.

## Limitations and Known Issues

Event Manager Communications History supports current and future EM communications. Past communication history is accessible only via View Candidate > View History tab.

## How Do Clients Get this Feature?

This feature is available without configuration but other Event Manager and BrassRing configurations impact this feature's functionality, as described in the preceding descriptions.

## Visible Changes

### Event Manager – Auto Complete field

The **Location** and **Owner** fields in Scheduled Events Page sometimes has over 200 options and it is taking a lot of time to load all the options leading to latency issues. To resolve this issue, this field is converted to an auto complete field similar to "Business group" field in Event Search. If the options in this field are less than 200 then it displays as a drop down similar to how it is working now. If the options are more than 200 then this field displays as auto complete field.

The **Business Group** field in Event Manager sometimes has over 200 options and it is taking a lot of time to load all the options leading to latency issues. To resolve this issue, this field is converted to an auto complete field similar to "Business group" field in Event Search. If the options in this field are less than 200 then it displays as a drop down similar to how it is working now. If the options are more than 200 then this field displays as auto complete field.

### Event Manager – Event Date Issue

**Background:** When candidates register for 'Remote' events, the event date was previously converted based on the candidates' time zone. This resulted in a discrepancy where the communication sent to candidate had date and time of the event that were earlier than the actual date and time. In order to resolve this issue:

- Abbreviated time zone names are displayed next to the event date while replacing the "Event Date" token with actual value without converting to the candidates' time zone. For example, if the event is happening on February 10th, 2014 in US Eastern Time zone, Event Manager now displays 02/10/2014 EST (based on date format system setting).
- For the time slot start and time slot end tokens, Event Manager now appends event date to the time slot start time and end time. For example, if the event is a non-remote event happening on February 10, 2014 in US Eastern Time zone and candidate registers for 10 AM to 11 AM time slot, Event Manager now displays 02/10/2014 10:00 AM EST in the time slot start token and 02/10/2014 11:00 AM EST in the time slot end token.
- Clients are recommended not to use Event Date token if they are using time slot start and end tokens, as they would display the event date.

### Event Manager Client Setting

The former Workbench client setting **Event Manager URL** with text field was replaced with a new client setting **Enable Event Manager** with Yes and No radio button options. Clients who already had BrassRing Event Manager enabled now have this option configured to "Yes." The setting is "No" for clients who do not have Event Manager enabled. The default configuration of the new setting is No.

## Evergreen Reqs – Autofiling Change

Previously, evergreen req candidates who were immediately archived could again be filed by the auto-file process to a req folder. This feature changes the auto-file utility so it no longer files candidates who are already archived.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> RDP 997	<input checked="" type="checkbox"/> Auto-file	
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic – see details below	

### Feature Description

Previously when a candidate for an evergreen req was immediately moved to the Archive folder (on the same day of application, either by a BrassRing user manually or by the Rules Automation Manager), the auto-file utility did not verify the archive folder. Thus the auto-filer could file an archived candidate (with the configured HR Status) to a req folder again. This feature changes the auto-file utility to include a verification of the archive folder *before* filing a candidate to req folder. Therefore, a candidate is filed to a req folder only when the candidate's record is not already present in either the req folder or the archive folder.

This change is not visible to BrassRing users or to candidates.

### Example of New Workflow

1. Candidate is submitted from Talent Gateway and filed to a Req using Insta-filer with a default HR Status.
2. RAM runs on the same day and archives the candidate OR user moves candidate manually to archive folder. Candidate is no longer present in the Req folder.
3. While Auto-filer utility runs overnight, checks for the candidate in Req folder.
  - When not found, utility then checks for the candidate in the archive folder.
  - When found in archive folder, utility does not file candidate to req folder.

### How Do Clients Get this Feature?

This feature is available automatically without configuration.

## Integrations – Assess Dimension Scores

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IBM® Kenexa® Assess® On Cloud Dimension scores are now available to recruiters on the candidate form in BrassRing.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> <b>RDP 1015</b>	<input checked="" type="checkbox"/> BrassRing <input checked="" type="checkbox"/> Integrations - Assess	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact our Support Team for implementation details.	

### Feature Description

IBM Kenexa Assess on Cloud (Assess) can create Dimension scores (also known as Competency scores) for assessments. With this enhancement, Assess now passes Dimension scores to BrassRing so that recruiters can use this additional data to evaluate and compare candidates when reviewing them in BrassRing. The scores are stored on the candidate form in BrassRing.

### BrassRing User Experience

User's can view the dimension scores on the candidate's completed form (attached to the candidate Talent Record) after the Assess results are available. All dimensions and any subdimensions from the Assess assessments are shown as Dimension names in the form. The following figure shows a preview of the candidate form using dimension scores. The inset shows part of the results form with sample Dimension score results.

Preview Candidate form [ KAS Assessment ]

Last Name

First Name

Requisition ID

AssessmentCode/ID

\*Assessment Name

Assessment Admin/Recruiter email

Date of Assessment

Elapsed Time

Questions Correct

\*Reporting Band

\*KRB Band

\*Results

Dimension Name 1 MC/MS Comp

Dimension Score 1 8 **Results**

Dimension Name 2 MC/MS Comp - MC Family

Dimension Score 2 56 %tile

Dimension Name 3 MC/MS Comp - MS Family

Dimension Score 3 8

Link to Assessment Report2

Link to Assessment Report3

Dimension Name

Link to Assessment Report4

Dimension Score

Dimension Name 1

Dimension Score 1

Dimension Name 2

Dimension Score 2

Dimension Name 3

## How Do Clients Get this Feature?

This feature is available to clients using assessments integrations (other than Previsor). It is controlled by a new candidate form attribute. Please contact our Support Team or your Certified Workbench User for more information.

# Configuration Tasks

This section describes the tasks required to configure this feature. Tasks labeled Workbench Self Service can be performed by certified Workbench Self Service users or by our support staff.

## Candidate Form Attributes – Workbench Self-Service (Tiers 0+)

The existing KAS Assessment candidate form is automatically created when “IntegrationAssessment” client setting is configured for any non-Previsor vendor.

This form includes a new attribute called **Enable Dimension Score fields**. The new attribute sets the number of instances of dimension score fields the form should have, and automatically creates the required fields. Before the attribute is enabled for an account, the BrassRing Service Representative should confirm with the Assess team that dimensions are in use with the client’s assessments.

**Workbench > Tools > Forms > Candidate forms > KAS Assessment > Edit**

**Edit form attributes**

**Form field alignment**  Default  Left

**Form layout**  Classic  Enhanced

**Enable language toggle**

**Include Common Service vendor results**  Yes  No

**Event Manager Internal Event Form?**  Yes  No

**Event Manager Candidate Facing Registration Form?**  Yes  No

**Create candidate signature field (for use in Gateway Questionnaire’s only)**

**Enable Dimension Score fields**   (No. of instances)

**Add / View / Modify My**

- Options list displays values greater than or equal to the existing number of dimension fields. For example, once set to 5 and saved, the minimum value displayed henceforth is 5.
- Once an attribute value is set and saved, it cannot be unchecked because the associated form fields have already been created.
- Once an attribute value is selected and the form is saved, the selected number of form field instances are automatically created:

A single instance includes DIMENSION\_NAME\_1 and DIMENSION\_SCORE\_1 text fields (display names are Dimension Name 1 and Dimension Score 1).

Each additional instance has the next consecutive number appended: DIMENSION\_NAME\_2, DIMENSION\_SCORE\_2, DIMENSION\_NAME\_3, DIMENSION\_SCORE\_3, etc.

## Integrations – Assessments Retake Selected in Batch

This feature allows BrassRing users to have candidates retake individual assessments within a batch, rather than requiring them to retake the entire batch.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> LDP 240	<input checked="" type="checkbox"/> BrassRing	<input checked="" type="checkbox"/> Integrations - Assessments
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic – see details below.	

### Feature Description

Instead of assigning an entire batch of assessments for candidates to retake, BrassRing users with the **Assessments – run retake** user type privilege can now select individual assessments within a batch. This is more both convenient for candidates, and also reduces situations in which candidates are unintentionally given an opportunity to improve a score for which they already have valid results.

For an assessment within a batch, once results are on file the individual assessment is selectable for Retake. Once *all* assessment results for the batch are on file, the full batch as well as all the individual assessments are available for selection. If a batch has been completed, its overall batch result is recalculated after any assessment in it is retaken.

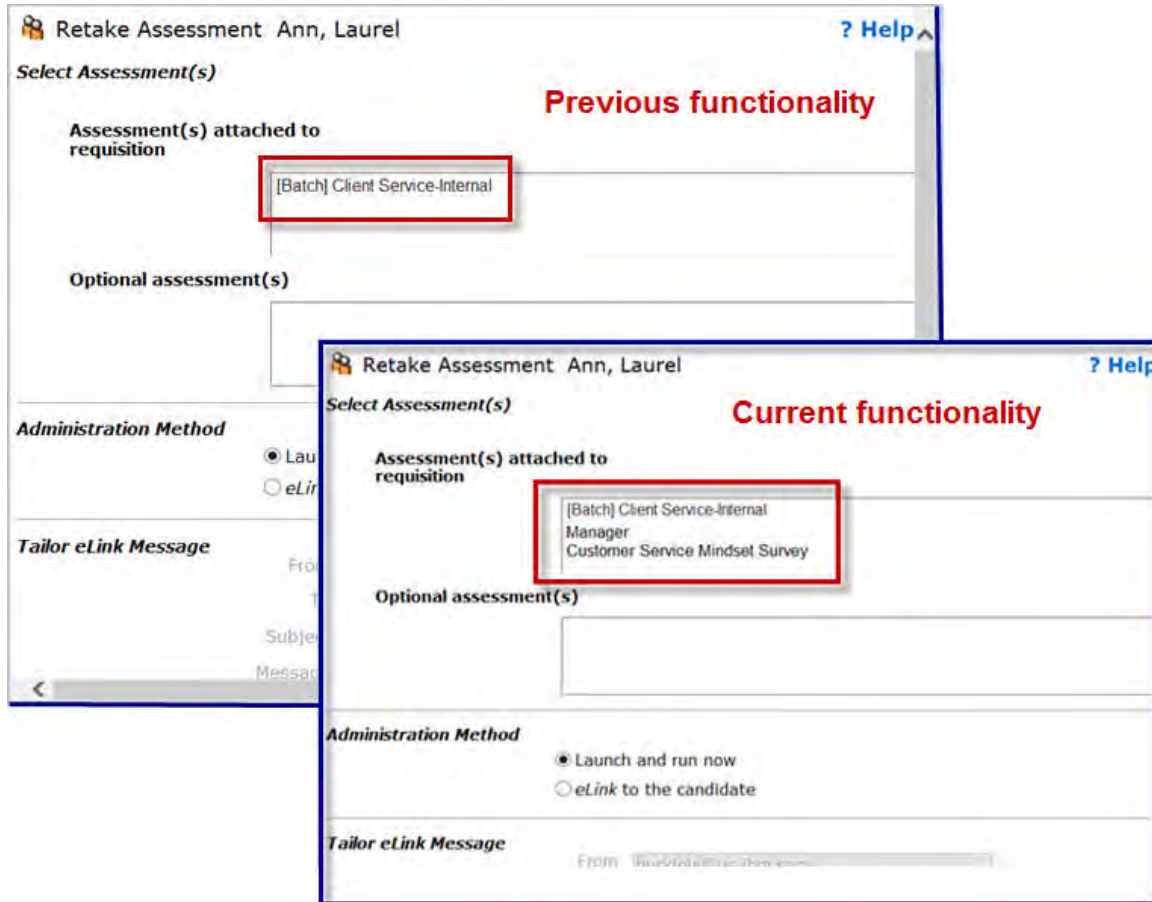
### BrassRing User Experience

BrassRing users must have the **Assessments – run retake** user type privilege to allow candidates to retake assessments. You can now have candidates retake an entire assessment batch or selected assessments within the batch. When you select completed assessments for a retake, if the results of one or more assessments within a batch are available, each is shown as an individual option in the retake window, regardless of whether the full batch is complete.

In BrassRing:

1. With the candidate who is to retake the assessments selected for a req or from that candidate's Talent Record, select **Retake Assessment** action. The Retake Assessment page opens.





2. Select one or more individual assessments for retake from the **Assessment(s) attached to requisition** display, *or* select the batch (batch name is displayed only if all assessments in the batch were completed). You cannot select individual assessments when you have a batch selected, nor can you select individual assessments from different batches simultaneously.
3. Select the administration method, **eLink to the candidate** or **Launch and run now** on screen.
4. Complete any other options and Run/Send or Run/Send Extended Time.

## Retake Results

If a batch has been completed before retake, its overall batch result is recalculated after any individual assessment in it is retaken.

When individual assessments within a batch are retaken:

- Scores of the other completed assessments within the batch are hidden until the selected batch assessments are complete.
- Prior results/scores for retaken assessments no longer display in the action log, only the new results.
- If multiple assessments are selected, the system prompts the candidate to complete the selected assessments in adherence with the order of the batch. Assessments will be active one after the other till the full batch is complete.
- If there are hurdles and the candidate does not attain the hurdle score in an assessment retake, then the subsequent assessments are disabled and the full batch is treated as failed.
- When the candidate completes all the assessments, batch banding, if required, is based on new scores received.



For full batch retakes as well as retakes for individual assessments that are not part of a batch, the original results are retained in the log. In all cases, the original candidate forms are removed as they are no longer valid or relevant.

### Example 1 - Retake Multiple Assessments in Completed Batch

Batch A includes the following individual assessments:

- Culture Fit
- Sales Fit
- Industry Terminology

If candidate is asked to retake Culture Fit and Sales Fit, the Industry Terminology link will not be active. When a retake is initiated for Culture Fit, the Sales Fit link is disabled until Culture Fit is complete. This is true whether hurdling is configured or not, in order to adhere to the order of the assessments, per the batch.

When Culture Fit is complete, Sales Fit link becomes active immediately if there is no hurdle score, or becomes active when candidate attains the hurdle score.

When results are received, all banding is done based on the new scores received for Culture Fit and Sales Fit.

If candidate fails in any of the retaken assessments, the entire batch is considered as Failed.

### Example 2 - Retake Assessment with Hurdle

Batch H includes the following individual assessments:

- Culture Fit - hurdle score = 30
- Sales Fit - hurdle score = 50
- Industry Terminology

Candidate completed Culture Fit and scored 35, then completed Sales Fit and scored 60, had not yet taken Industry Terminology. If a retake is initiated for Culture Fit:

- Results for Culture Fit are removed
- Candidate is sent a link to take Culture Fit again.
- Sales Fit scores are hidden from view in the user interface
- Link to Industry Terminology is disabled until Culture Fit is retaken and passed (score  $\geq$  30).

If the new Culture Fit score is *less than* 30, then the candidate fails the hurdle. The batch is marked as complete and an Overall form is created. The Sales Fit score remains hidden from view within the requisition as if the candidate never completed it. The results remains on file, however, for use in future requisitions.

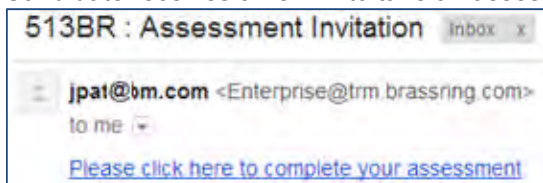
If the new Culture Fit score is *greater than or equal to* 30, then the Sales Fit score is used again to calculate the pass/fail result, and the results now display. (Status dates are not recalculated, BrassRing keeps the original date/time taken.) The candidate is prompted to complete Industry Terminology.

## Candidate Experience

The candidate experience with this feature is essentially unchanged, except that when a retake is needed, the candidate is spared unnecessarily repeating assessments within a batch that are not specifically targeted and selected for retake.

Sample scenario for retake with two assessments in a batch (no hurdles):

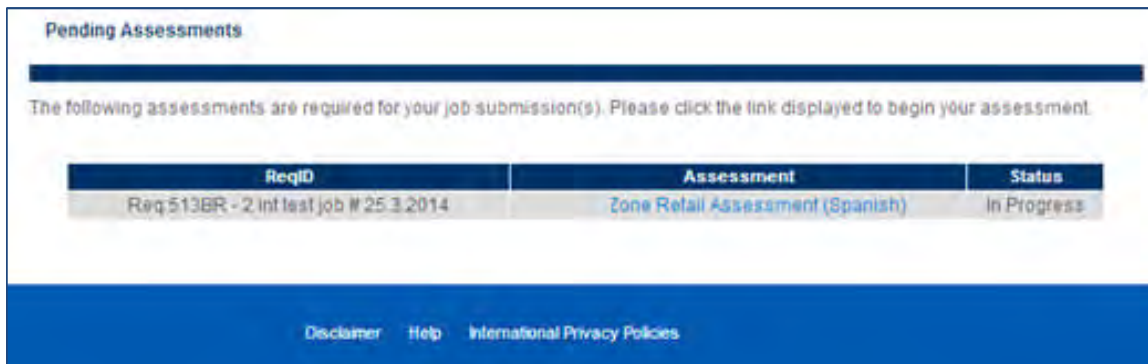
1. Candidate receives an eLink to take an assessment for the first time.



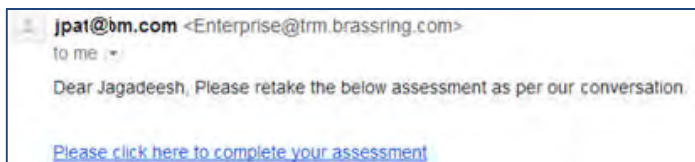
2. Candidate selects link. Pending Assessments page appears, showing both assessments in the batch listed for the candidate to complete.



3. Candidate completes "Film Crew V2", and it disappears from the list.



4. Candidate receives eLink invitation to retake "Film Crew V2."



5. Candidate selects link. "Film Crew V2" is available for retake.

**Pending Assessments**

The following assessments are required for your job submission(s). Please click the link displayed to begin your assessment.

ReqID	Assessment	Status
Req 513BR - 2 int test job # 25.3.2014	<a href="#">Zone Retail Assessment (Spanish) Film Crew V2</a>	In Progress Not Started

[Disclaimer](#) [Help](#) [International Privacy Policies](#)

### Limitations and Known Issues

Generally within BrassRing for multiple per candidate/req forms, the most recent data is displayed on the candidate listing grid. Part of the intent of batched assessments is to ensure that when comparing candidates, the same assessment results are displayed for comparison purposes. When an individual assessment in a batch is retaken, however, users see the last assessment taken, which is not necessarily the last assessment in the batch.

### How Do Clients Get this Feature?

This feature is available automatically without configuration for clients using integrated assessments (IntegrationAssessment client setting enabled). Users require the Integration **Assessments – run retake** user type privilege.

# Integrations – Background Check Vendor Updates

Updates for background check integrations with IBM® Kenexa® BrassRing® on Cloud Release 14.0 include:

- ADP has been added as a background check vendor
- 1-step integration with Sterling (existing vendor) is now available

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> RDPs 1084, 1096	BrassRing	Integrations – Background Check
<b>Visible Changes</b>	No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	Configuration required – contact our Support Team for implementation details.	

## Feature Description

For background check integrations with BrassRing:

- ADP is now available to clients as a vendor for background check integration with BrassRing. This is a 1-step integration. In a 1-step integration, BrassRing users pre-select service packages for their req so that when they set a candidate to the triggering HR status, BrassRing submits the request in the background in a format that satisfies the vendor application data requirements. The candidate's basic status and results are updated within the preconfigured BrassRing standard candidate results form, and detailed results become available through link back to the vendor from that results form.
- Previously offering a 2-step integration with background check vendor Sterling, BrassRing now has available a 1-step integration with Sterling (Sterling will support 2-step integration with their old system, and support 1-step with their new platform).

## BrassRing User Experience

Following is a sample user experience for a 1-step integration.

1. Vendor packages are pre-associated with reqs so that BrassRing users can select from the offerings when creating a req..
2. With the required data selected on the req, an HR Status update to the candidate triggers the submission of a background check request to the vendor.
3. When the vendor returns order status, updates, or results data, BrassRing users can access that information through the candidate's Background Check Results form. The form displays a link, which takes the user to the vendor UI to view details or results.

The process for a 2-step integration is similar, but the triggering HR status update sends the user to the specific vendor's site, where the user selects the background check service or package.

Viewing results when the check is complete is the same for both processes.

## How Do Clients Get this Feature?

Background check integrations are controlled by integration subscription settings and field mapping. Please contact our Support Team for more information.

## Configuration Tasks

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The following summarizes the steps to configure 1-step integration. Setup for 2-step is similar. For complete information, see the internal Common Service – Background Check Integration Community site.

1. Create the subscription to the vendor in Workbench.
2. Select the vendor.
3. Specify the type of integration (select 1-Step or 2-Step, as appropriate).
4. Add authentication information.
5. Reference HR Status to initiate the request
6. Map form fields to background check XML schema.
7. Set up values for packages on the requisition template (**Tools > Forms >Reqs >Req forms > Administer req fields> Background Check Packages**). Once the client setting is enabled, two (2) custom static fields are created automatically.
8. Set up any necessary candidate forms for capturing data
  - Associate selected packages to forms (based on req)
  - Block HR Status update if form(s) not available
9. Configure a Background Check form to capture the standard results for the background check.

Fields can be hidden for certain user types.

If results are not returned, the form should be inactivated.

# Integrations – Configuring Third Party Assessment Vendors

This feature introduces a standardized service platform for vendors to integrate IBM® Kenexa® BrassRing® on Cloud with third party assessment vendors.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> LDP 170	<input checked="" type="checkbox"/> BrassRing	<input checked="" type="checkbox"/> Integrations – Assessments
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact our Support Team for implementation details.	

## Feature Description

This feature introduces a standardized service for configuration of third party assessment vendors via Workbench. This integration process mirrors functionality now available with IBM Kenexa assessments, offers simultaneous multiple vendor support, and includes the following functionality.

- Launching of assessments as part of application flow, manual send, or automate as part of HR status update.
- Managing lifespan of assessment results; lifespan can be set per assessment or even per score of assessment
- Automating reminder notices and rejection for failure to complete notifications
- Hurdling scores to determine whether additional assessments are required

Recently added vendors include: Quintela, Shaker, APT, PeopleAnswers, and Aon Hewitt.

With the standardized service, clients can now more easily integrate their BrassRing systems with additional assessments vendors.

## BrassRing User Experience

As with existing functionality with current IBM Kenexa assessment offerings, the third party vendor name is appended to the Assessment name when one or more vendors are in use.

## Candidate Experience

When clients use third party assessment vendors, the overall candidate experience doesn't change. Talent Gateways and Gateway Questionnaires respect all client Workbench settings and apply them to third party vendors. For example, TG text customization, assessment invitation message, landing page link text, summary etc. are configurable for each third party vendor.

Pending assessment page does not show the vendor prefix for the assessment titles, since this is not important to candidates.

Third party vendors, as well as IBM® Kenexa® Assess on Cloud always launches via a new window to ensure the vendor can control the candidate experience/screen size.

## Limitations and Known Issues

When handling new vendors:

- System defaults to the Talent Gateway language.
- Talent Gateway language format is: <LanguageCode>-<CountryCode>]. For example, EN-US is sent for English.

Most vendors, however, offer a language selection option on their landing page.

## How Do Clients Get this Feature?

This feature is controlled by new client setting options.

Please contact our Support Team or your Certified Workbench User for more information.

# Configuration Tasks

This section describes the tasks required to configure this new feature. Tasks labeled Workbench Self Service can be performed by certified Workbench Self Service users or by our support staff.

- [Client settings](#)
- [Configure Assessment Vendor Page](#)
- [Add Assessments](#)
- [Assessment List](#)
- [Talent Gateway – Administration and Text Customization](#)

When configuring Assessments, always refer to the most current version of the *BrassRing Integration Assessments Configuration Guide* located in the BrassRing Integration Assessment Community.

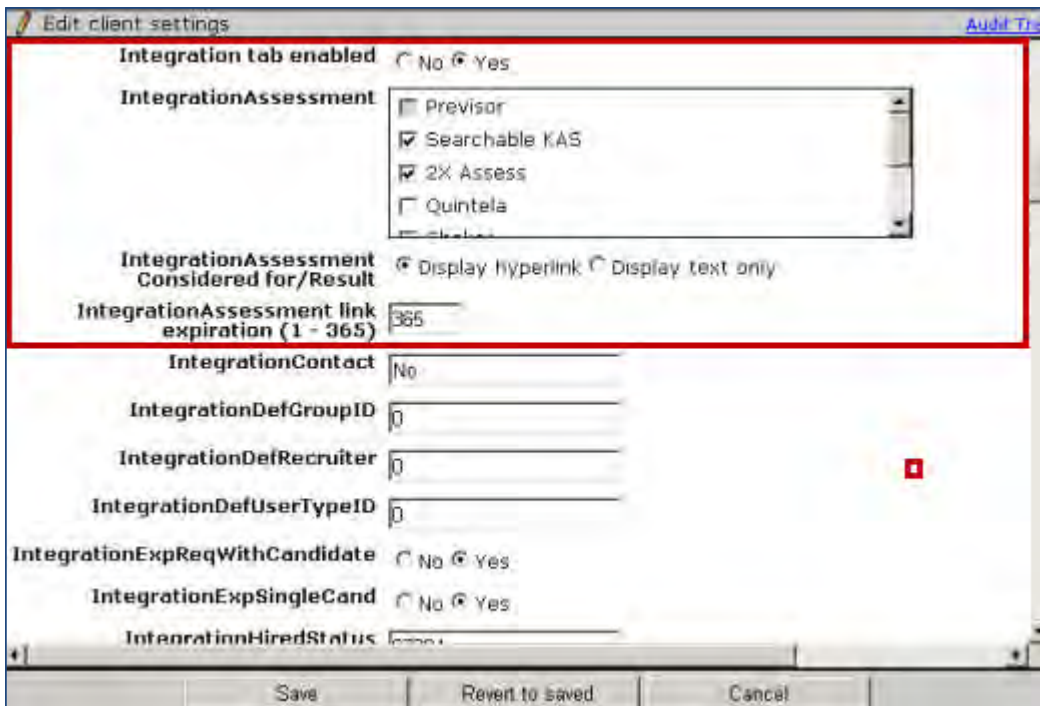
## Client Settings – Workbench (Support Staff)

Integration Assessments can be configured for new and existing assessment vendors.

Workbench > Select a client > Edit

–OR–

Workbench > Admin > Manage Clients > Edit client settings [for selected client]



1. Select: the Yes radio button to enable the integration tab.
2. Select the IntegrationAssessment vendor.
  - Selecting a vendor creates standard settings for assessment vendors (except for Previsor).
  - Selecting additional vendors creates an additional "Configure Assessment Vendor" page.
3. Select Display Hyperlink or Display Text Only for the Integration Assessment Considered for Result.
4. Enter numerical value representing number of days for Integration Assessment link expiration (1-365).
5. Select Save.



## Integration Configuration – Workbench Self-Service (Tiers 7+)

### Configure Assessment Vendor Page

A generic assessment vendor page supports IBM Kenexa as well as third party vendors.

WB>Tools>Integration>Assessments>Configure Assessment Vendor.

The screenshot shows a web browser window titled "Configure assessment vendor". The form contains the following elements:

- Assessment vendor:** A dropdown menu with "2X Assess" selected.
- \*Partner client ID:** A text input field containing "123".
- \*Partner request URL:** A text input field containing "213".
- \*Partner result URL:** A text input field containing "www.brassring.com".
- ATS ID:** A text input field containing "2xBrassing".
- Assessment Batch configuration:** A checked checkbox with a note: "(any changes to this field will reflect to all the configured vendors)".
- Default assessment invitation (when sent from BrassRing):** A checked checkbox next to a text area containing: "Please complete this assessment to be considered for employment with Boston Children's Hospital."
- \*skills assessments lifespan:** A text input field containing "180" with a note: "# Days results remain valid".
- \*Non-skills assessments lifespan:** A text input field containing "360" with a note: "# Days results remain valid".
- Set Lifespan at Assessment Level:** An unchecked checkbox with a note: "(any changes to this field will reflect to all the configured vendors)".
- Buttons:** "Save", "Revert to saved", and "Cancel".
- Footer:** "Configure Field Mapping" link.

1. Select Configure Assessment Vendor.
2. Assessment vendor is a single-select dropdown with all the vendors that are selected as part of the Integration Assessment client setting. When the value is selected from drop down, the page is reloaded and the rest of the screen content refreshes to suit the selected vendor.
3. Assessment Batch configuration and Set Lifespan at Assessment Level settings apply to all vendors for the client. When Assessment Batch configuration is checked, the SEARCHABLE\_KASOverallResult form is created for assessment results.

In the case of "Assessment Batch configuration" and "Set Lifespan at Assessment Level", if either box is checked for another vendor then by default, they will be checked for the new vendor.

4. To prevent the accidental acceptance of erroneous data, toggling to another vendor after the first has been configured does not default data for the new page. For example, if the "Default Assessment invitation..." has been populated, it is blank for the next vendor when you toggle to configure it.

## Integration Configuration – Workbench Self-Service (Tiers 7+)

### Talent Gateway Administration

WB>Tools>Talent Gateways>Edit

1. Select Default Assessment batch, if using Batches and want to prepopulate for the gateway.
2. Scroll and select checkbox as applicable for (does not apply to Previsor):
  - Launch Assessment via Continue Button
  - Always launch assessment(s) – only available for Non-Previsor vendors
  - Launch assessments via a new window

**Default Assessment Batch:**  ▼

- Launch Assessment via Continue button
- Allow the Web service to query this gateway
  - Require encryption
- Disable GQ pre-filled responses
- Disable JSQ widget only pre-filled responses
- Do not allow posting without GQ selected
- Enable Search Engine Optimization
- Always launch assessment(s)
- Launch assessment(s) via new window

3. Select Save.

## Talent Gateway Text Customization – Workbench Self-Service (Tiers 1+)

### Talent Gateway – Text Customization for Landing Logged In

1. WB>Tools>Talent Gateways>Edit Text Customization.
2. Select Landing Logged In tab and scroll to Assessment Page Text.

The screenshot shows the 'Landing logged in' tab selected in the top navigation bar. The main content area contains the following elements:

- Assessment page link text:** A text input field containing 'Assessments', a 'Reset to default' button, and a 'Show me' link.
- Hide on Gateway:** A checkbox that is currently unchecked.
- Assessment page summary text:** A text input field containing 'Access pending assessments that are required for your submissions.', a 'Reset to default' button, and a 'Show me' link.
- Default site for assessment access for non-logged in profiles with matching locale:** A checkbox that is currently unchecked.

3. Complete the text customization fields for Assessment page link text and Assessment page summary text. Select the Hide on Gateway if desired.
4. Select the Notifications tab.

5. Complete the text customization Assessment fields:

- Assessment Invitation Message
- Launch Assessment Button
- Assessment Invitation Message
- Assessment page title
- Assessment page text – with assessments pending
- Assessment page text – no assessments pending

6. Select Save.

## Integrations – HireVue Video Interviewing

The HireVue integration with IBM® Kenexa® BrassRing® on Cloud provides on-demand digital interviewing services – video interviews. Users can schedule a video interview and capture the status in the candidate’s BrassRing Talent Record. BrassRing now supports 1-step integration in addition to 2 step integration.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> RDP 1059 RDP 580 (R13.0 update)	<input checked="" type="checkbox"/> BrassRing	<input checked="" type="checkbox"/> Integrations – Video Interviewing
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact our Support Team for implementation details.	

### Feature Description

HireVue video interviewing integrations with BrassRing use secure, browser-based technology, allowing your organization to send standardized questions to candidates and let them record responses via webcam. Then you can watch, rate, and share the candidates you want, on your own schedule. This minimizes time and travel costs associated with early stage interviews, and removes the inconveniences of scheduling.

With a 1-step integration, the BrassRing users select preconfigured interviews for their req. When they set a candidate to the triggering HR status, BrassRing automatically submits the request in the background, in a format that satisfies HireVue’s data requirements. The candidate receives an invitation to complete the interview. The notification to the BrassRing user, with link to view the completed interview, is the same as for 2-step. The 1-step integration is generally used in high-volume interviewing, when pre-defined interviews are used for all candidates.

### BrassRing User Experience

The process is triggered when the BrassRing user updates a candidate to the “designated” HR Status, from within a req folder for a “designated” req template. (Both req template and HR Status are designated in the configuration setup for the HireVue candidate export subscription.)

The system passes the candidate and interview information to HireVue for processing, and the basic status and results are updated within the configured BrassRing standard candidate form once HireVue returns them. Users can access the results directly from the link in the notification, or from the candidate form (from the candidate grid of the req folder or the candidate’s Talent Record). The candidate form includes a hyperlink for accessing the candidate’s video, and to rate and share it.

### How Do Clients Get this Feature?

This feature is controlled by a client setting and subscription setup and field mapping in Workbench. Please contact our Support Team or your Certified Workbench User for more information.

# Configuration Tasks

---

The following summarizes the steps to configure 1-step integration. Setup for 2-step is similar. For complete information, see the internal Common Service – Background Check Integration Community site:

This integration reuses the common service developed for “Background check” with a few modifications. For setup, you must:

- Enable client setting
- Add vendor
- Set up forms, if necessary
- Set up candidate subscription details and mapping. For video interview integrations, the subscription can be set to pull from a mix of candidate profile and candidate form fields

Interviews are preconfigured in HireVue. A mapped field on the requisition indicates to HireVue which interview to give.

## Client Setting

Client setting: **Common Service Integration Type (Background Check, etc.)**

**Workbench > Select a client > Edit**

–OR–

**Workbench > Admin > Manage Clients > Edit client settings** [for selected client]

Set to **Yes**. When that is done, the standard form is automatically created (if client is not already using one of these integrations), and schema will be available for selection for Candidate Export subscriptions).

## Add Vendor

Create the subscription to the vendor. Vendors are set up at ENVIRONMENT level, so vendor must be set up once for Staging and once for Production.

**Admin > Manage integration vendors > Add vendor:**

**Vendor name = Video Interview: HireVue**

**Vendor code = HireVue**

Enter **Contact name** and **Email**, add any other desired fields, and select **Video Interview**.

**Edit vendor** [Audit Trail](#)

\*Vendor name:

\*Vendor code:

\*Contact name:

Phone:

\*Email:

Troubleshoot routing email:

Vendor description:

Hide contact information upon errors

Hide system-generated error message from users

Custom text  [English - United States]

Default posting URL:

Information link URL:

(export only)

Vendor type:

Save    Revert to saved    Cancel

### Configure Form for Video Interview Vendor Results (optional)

The standard results form can be used for the HireVue video interview results. If the client has two or more integration vendors, however, you can configure another form so the client can use a different results form for each integration vendor.

**Tools > Forms > Candidate forms > Edit form attributes** [for selected Multiple per candidate/req form]:

Set **Include Common Service vendor results = Yes** (default is No). Once set to Yes, the attribute cannot be changed back to No.



The screenshot shows the 'Edit form attributes' window with the following settings:

- 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
- Include Common Service vendor results**  Yes  No
- Event Manager Event Form?  Yes  No
- Add / View / Modify My: HR Staff, Super User, Hiring Manager, Entry Level Manager, QuickStart User
- View all: HR Staff, Super User, Hiring Manager, Entry Level Manager, QuickStart User

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

When set to **Yes**, the form becomes available on the Add subscription page, and the special standard fields are automatically created and added to the candidate form. Form data will be imported to the corresponding standard fields.

Currently the system sends status '**Scheduled**' when the interview has been scheduled, and vendor will also send '**Techcheck Complete**' and '**Interview Complete**' at a later date.

Once a form has been selected and saved as "Custom candidate form for vendor results" for any for any candidate export subscription, it cannot be inactivated/deleted. Next step is Add Subscription – Schema.

### Add Subscription (Schema) - Subscription Tab

**Tools > Integrations > Administration > Subscription admin [for Candidate export] > Add subscription:**

Set **Select schema = HRXML 2.5 Common Service (Background Check, etc.)**

**Select req template** for which video interviews can be initiated when candidate moves into trigger HR status.

Set **HR status** trigger to initiate the request (cannot be Talent Record trigger). This HR status must be unique for all subscriptions, so use a unique HR status for this (create it if necessary, e.g., add "Video Interview" HR status). This form is read-only for Edit, to ensure no data is orphaned after the configuration is complete.

Set **Common Service Integration Type (Background Check, etc.)** to **1-Step** or **2-Step** as appropriate.

Select a form for **Custom candidate form for vendor results:**

You can use this field if the client has two or more integration vendors (so the client can use a different results form for each).

- The **“Background Check Results”** (DB name = Background\_Check\_Integration) form is used if no other configured candidate form is selected, and the form data is imported to the corresponding standard fields.
- If subscription has a custom candidate form associated, the form data is imported to the selected candidate form and the corresponding standard fields (see chart above) are populated with import values. Any non-standard fields on this form will not be used for this import.
- In both cases, the form is created for the candidate and is tied to the req. Fields not supported by HireVue will be blank (if not hidden by configuration).

This form is read-only for Edit – do not expect to use a custom Results form for any custom fields – it can only be used for the standard results fields. Don’t try to “convert” an existing form for this purpose.

### Add Subscription (Select Vendor) - Subscriber Tab

**Tools > Integrations > Administration > Subscription admin [for Candidate export] > Add subscription:**

Select the vendor and complete any other required fields.

Set up client-level authentication in the Authentication section: specify **Account**, **User name**, and **Password**. CSCs should get this information from the client or the vendor (in Staging/Production, this should be client-specific).



Edit Subscription - HireVue

Subscription Subscriber Mapping

**Select a subscriber**

Please select the vendor or host to be associated with this subscription

**Current subscriber:** Vendor: HireVue

Select vendor Select host

**Security & Transmission properties**

Send via: HTTP post

If HTTP post send to:  Default URL for vendor/host  Custom URL

If Web Services, select WSDL:

Validate SSL Certificate?  No  Yes

Post form or bare XML?  Form  Bare XML

**Authentication**

Account

User name

Password

Confirm Password

Save Revert to saved Cancel

## Add Subscription - Mapping Tab

### Tools > Integrations > Administration > Subscription admin [for Candidate export] > Add subscription:

Set up export field mapping. No specific mapping is required, but it is recommended to map all available and HV-supported fields for best user experience. Refer to the HireVue mappings spreadsheet in the Common Services Background Check community for details:

# Integrations – Posting to Vendor Job Boards

This feature provides a common service platform for IBM® Kenexa® BrassRing® on Cloud vendor integrations that allows clients to post requisitions to generic job boards and aggregators from within the BrassRing application during the requisition posting workflow.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> LDP 252	<input checked="" type="checkbox"/> BrassRing <input checked="" type="checkbox"/> Talent Gateways	<input checked="" type="checkbox"/> Workbench <input checked="" type="checkbox"/> API and Web Services
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact our Support Team for implementation details.	

## Feature Description

The generic job posting feature allows clients to post requisitions to job boards and job board aggregators from within the BrassRing application, using a common service platform for the BrassRing vendor integration. When configured the common services platform provides a streamlined process for posting requisitions.

Feature configuration includes the mapping of BrassRing requisition fields with a job board vendor's job fields to simplify the job posting workflow. For example, when BrassRing users post requisitions to a job board, job requisitions fields automatically populate and BrassRing users only need to complete job requisitions fields that are unique to their particular job postings.

## BrassRing User Experience

When configured, a BrassRing recruiter can post requisitions to a job boards using a common services platform vendor. BrassRing user logs into the BrassRing application and:

1. Selects a requisition and then selects Posting options.

The Posting option page launches.

Posting interface	Date submitted	Start date	Posting expiration/duration	Post/edit details
BrassRing Recruitment Services				
<a href="#">BrassRing</a>				
<a href="#">Community Gateway Post</a>				
<input checked="" type="checkbox"/> MultiPosting	20-Oct-2014	20-Oct-2014		

Update all postings Close Cancel Refresh Update newly selected/unselected postings only

2. Selects Post/Edit details icon for multiposting in the Other Posting options section. The Talent Gateway selection page launches.



If BrassRing users select a hyperlink for a job board in the Other Posting section, they must also log into the board with their job board credentials. This workflow does not send posting acknowledgments for successfully posted requisitions.

Please select the appropriate Gateway URL(s) to direct candidates to.

\*Job Apply URL (English (US))

3. Selects a Full Talent Gateway using the drop-down menu.
4. Selects Submit.

The Vendor posting page launches.

The screenshot shows a web interface for selecting job boards. At the top, there are navigation tabs for 'STEP 1', 'STEP 2', and 'STEP 3'. Below this, there are three main sections:

- General Job Boards:** A list of checkboxes for various job boards. 'AdenDesk' is checked. Other options include AAE, APEC, CritJob, AdequaJob, and Cadremploi.
- Specialized Job Boards:** A list of checkboxes for specialized boards. 'Abic-Luxe' and 'ACI77' are visible.
- School Filters:** A section with radio buttons for 'Internship', 'Apprenticeship', and 'Job'. Below this is a blue bar indicating '0 schools found'.

At the bottom of the page, there is a 'Save my selection' checkbox and a 'Next' button.

5. Selects the job board or boards by selecting the check box for each job board.
6. Selects Next.

The Vendor posting page launches and most job requisition fields auto-populate.

STEP 1   **STEP 2**   STEP 3

---

**Corporate Profile**

- Last name \*  ✓
- First name \*  ✓
- Phone \*  ✓
- Company description \*  ✓
- Post job  Immediately  Later ✓

---

**Common Fields**

- Reference \*  ✓
- Job title \*  ✓
- Job description \*  ✓ ⓘ
- Location \*  ✓
- Postal Code \*  ✓
- Country \*  ✓
- Education level \*
- Work experience \*
- Contract type \*  ✓
- Profile \*  ⓘ
- Duration of contract (months) From:  To:

7. Completes job requisitions fields as necessary and selects Next.  
The Vendor posting validation page launches.

! Please review the content of your job offer and click validate below.

---

**Selected Job boards**

AdzenGorill (en)
  Bureau Emploi (en)

---

**Corporate Profile**

- Receive applications by URL
- Phone 00.00.00.00.00
- Post job Immediately
- URL [http://www.ibm.com/press/room/20150601/ibm-announces-ibm-quantum-computing](#)
- Company description
- Last name Challuri
- First name Aparna

---

**Common Fields**

- Reference 24495BR
- Job title Multiposting Req 3
- Job description
- Location Littleton
- Postal Code 10
- Country United States
- Education level Master's Degree
- Work experience 1-2 years
- Contract type Contract
- Profile

8. Reviews the current job posting and edits fields as necessary.
9. Selects Validate.

The job is posted to the job boards and a success message displays.

Job posts to job board vendor and a yellow circle highlight surrounds the push pin icon on the requisition page to indicate a successful job board posting.

If a job is removed (or expired) from a job board, the circle highlight changes from yellow to gray.

If the job is posted to multiple boards, the highlight will not change until all job postings have expired or been removed from the Job Board.

### Limitations and Known Issues

This feature is only available on Full Talent Gateways.

### How Do Clients Get this Feature?

This feature requires that the necessary client settings be enabled. When enabled, Workbench Self-Service (WBSS) users can configure Standard and Custom Req Fields for job board vendors.

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

# Configuration Tasks

This section describes the tasks required to configure this feature. Tasks labeled Workbench Self Service (WBSS) can be performed by certified WBSS users or by our support staff.

This feature requires the Core Team to configure a Data Model Change Request (DMCR). After DMCR configuration, Support Team members can configure the two client settings:

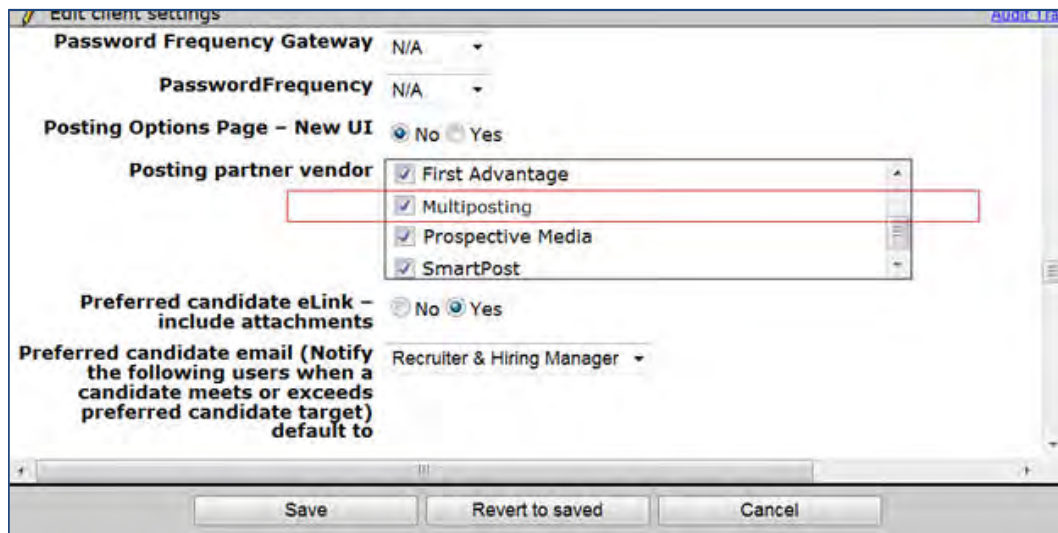
- Posting partner vendor - Multiposting setting allows BrassRing users to post requisitions to job board vendor
- Automatically populate req data for edit to posting partner intermediate page setting allows mapped requisition fields to automatically populate during the job posting workflow

When complete, WBSS users can then configure Standard and Custom Req Fields for generic job board vendors.

## Client Settings – Workbench (Support Staff)

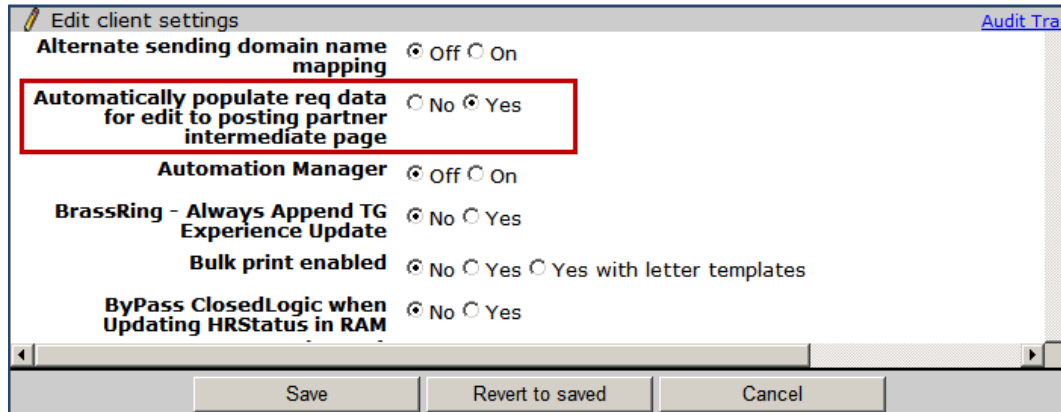
The Posting Partner Vendor client setting enables WBSS users to configure posting options and post requisitions to job board vendors.

1. Workbench > Select a client > Edit  
–OR–  
Workbench > Admin > Manage Clients > Edit client settings [for selected client]



2. Select the checkbox for Multiposting.
3. Scroll to the client setting Automatically populate req data for edit to posting partner intermediate page and select the Yes radio button.





4. Select Save.

## Req Form Field Attributes – Workbench Self-Service (Tiers 1+)

Once the client setting is enabled, WBSS users can map the required Standard and Custom req fields to the appropriate job board vendor (Posting Interface Mapping). Once the req fields are mapped, the mapped fields automatically populate field during the job board posting process.

WBSS user:

1. Navigates to Tools > Forms > Reqs > Req forms > Define custom req fields.
2. Selects the req field.
3. Selects Edit form field attributes pencil icon.

Edit field attributes dialog box launches.

**Edit standard Req fields** Audit Trail

**Placement** 3

**Default label** Job Description

**Custom label** Job Description [English (US)]

**Field type** textarea

**Field help text (Applies to Enhanced Layout only)** [English (US)]

**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.

**Non-editable for these user types** Hiring Manager  
HR Executive  
HR Staff  
QuickStart User  
Super User  **Extend to add req**

**Show in these languages** English (US)  
Dutch  
English (Intl)  
French  
German  
Italian

**Required for these user** This field will be required for all users who have access to view this

Save Revert to saved Cancel

4. Select posting interface mapping option for that particular field.
5. Select Save.
6. Repeat Steps 2 through 5 for each req field you want mapped. The selected mapped fields will map to the vendor's common requisition fields and display as automatically populated fields during the job posting process.
7. Select Save.

## Setup by BrassRing Admin/Admin+ Users

With client settings enabled and the Req form fields attributes mapped for the vendor, BrassRing Admin users can add New Posting Partners vendors. Configuring Posting Partners vendors adds these posting options for All Reqs/My Reqs posting page.

BrassRing Administrator users can configure the posting interface defaults like User ID, Username & Password on the Gateway interface defaults page for the new job posting vendors in BrassRing.

BrassRing Admin user:

1. Navigates to Admin > Posting Interface Defaults > Edit My Profile > Add New Posting Partner.  
The Add New Posting Partner dialog box launches.

**+** Add new posting partner Help

**Posting partner**  [Selection details](#)

**\* Account ID**

**\* Username**

**\* Password**

\* = required field

2. Select the Posting Partner from the drop-down menu and completes the following fields:
  - Account ID
  - Username
  - Password
3. Select Save.

# Integrations – Subscription Security Enhancement

Integrations using a subscription-based configuration can use a new **Enable Security Token** attribute to improve security for imports.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> RDP 1051	<input checked="" type="checkbox"/> BrassRing	<input checked="" type="checkbox"/> Integrations
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact our Support Team for implementation details.	

## Feature Description

Integrations using a subscription-based configuration can use a new **Enable Security Token** attribute to improve security for imports. The new token is stored on the Subscription page, then read at the time of processing by the integration service and validated against the inbound XML. If the security requirement is not met, the import fails and displays an error message

This new setting is available for the following subscription types: Foundation Import, Req Import, Job Code Default Data Import, Form Import, Candidate Import, Candidate Status Update, User Import, Field Association Import

## How Do Clients Get this Feature?

This feature is controlled by a new integration subscription attribute in Workbench. Please contact our Support Team or your Certified Workbench user for more information.

# Configuration Tasks

This section describes the tasks required to configure this feature for clients using an import integration type. Tasks labeled Workbench Self Service can be performed by certified Workbench Self Service users or by our support staff.

## Subscription Admin – Workbench Self-Service (Tiers 7+)

All inbound subscription types now have a new field **Enable Security Token** on the subscription tab. Adding a security token adds an additional layer of security for inbound integrations that use a subscription-based configuration.

To set a token:

1. Navigate to **Tools > Integrations > Administration > Subscriptions Admin** [for selected integration types of Foundation Import, Req Import, Job Code Default Data Import, Form Import, Candidate Import, Candidate Status Update, User Import, or Field Association Import] > **Add subscription/Edit settings**
2. In the Subscription tab's Properties section, check the **Enable Security Token** box and enter your security token.

The screenshot shows the 'Edit Subscription - Background Check - HireRight' interface. The 'Properties' section contains the following fields and options:

- Subscription name:** Background Check - HireRight
- Manifest name:** Background Check - HireRight
- Select schema:** HRXML 2.5 Common Service (Background Check, etc.)
- Select req template:** LB Test
- Custom candidate form for vendor results:** (empty)
- Notes:** (empty text area)
- Export:** Code (selected), Description
- UTF type:** UTF-8 (selected), UTF-16
- Client message:** Display response message (selected), Display vendor/host configured message
- Email error notification:** None (selected), Default email, Custom email
- Error notification additional recipients:** Selected [0], List >>
- 2xO Onboarding:** (checkbox)
- Additional XSLT formatting:** (dropdown)
- Order Details Link Use Logged in User ID:** (checkbox)
- Export Country ISO Codes:** Default (selected), 2 Character ISO, 3 Character ISO
- Export State 2 Character ISO Codes:** (checkbox)
- Enable Security Token:** (checkbox, highlighted with a red box)

The 'Triggers' section shows:

- HR status:** (checked)
- Select statuses:** APR23S%&\*\0\_+0|?aU0N葬集

- The text field accepts up to 100 characters including letters, numerals, and special characters: `{ } [ ] , . ; : ' " ? / \ ` ~ ! @ # $ % ^ * ( ) _ - + =`
  - Unsupported characters include extended and multibyte characters as well as: `< > &`
3. Save the configuration in Workbench.

## Uploading Security Token (Support Staff)

After the token is configured in Workbench, contact BrassRing Professional Services Engineering to:

- Create the required XSLT with the security token value
- Upload the XSLT to the integration layer from which the XML comes from client system to BrassRing system).

Clients make no actual changes to their XML, regardless of the subscription setting. The integration service uses the XSLT to introduce and validate the token in the layer for inbound XML from clients with the security token set and XSLT uploaded. (The security token nodes that are introduced by the XSLT are then stripped off before the incoming XML is stored in backend.)

If the new security node can't be introduced or the node value doesn't match the value stored in Workbench, validation and import fails, with the following error:

"The security requirement has not been met."

## Metrics Panel – New Basic Views

A new, enhanced metrics panel has six different views that provide comprehensive information covering various dimensions of the data in numerical or graphical views. The following views are available in the new metrics panel: New Hires, Pipeline, Requisition Aging, Requisition Status, Requisitions, Success

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> LDP 225	<input checked="" type="checkbox"/> BrassRing	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact the BrassRing Support Team for implementation details.	

### Feature Description

The new basic metrics panel views provide information in numerical or graphical views. The new panel:

- Is available on the Home page of BrassRing
- Includes these views: **New Hires, Pipeline, Requisition Aging, Requisition Status, Requisitions, Success**
- Has a filter option allowing users to select up to three filters and apply them collectively to all six views
- Allows users to export the metrics to a PDF file
- Displays either All Candidates/All Reqs information or My Candidates/My Reqs information depending on the user's user type privileges.


The six new metric panels include:

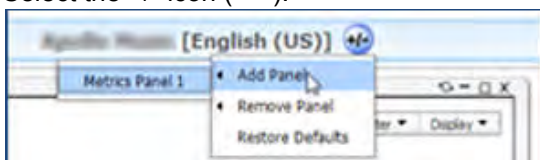
- New Hires (data table display)
- Pipeline (data table display)
- Requisition Aging (graph)
- Requisition Status (graph)
- Requisitions (data table display)
- Success (data table display)

They replace twelve basic metrics, including: Hire Analysis and Time-to-Fill; Pipeline Volume, Pipeline Conversion Rate, and Pipeline Cycle Time; Requisition Age; Requisition Status; Requisition Activity; Offer Success Rate; Source Yield, EEO Pipeline, and Source Comparison.

### BrassRing User Experience

When the metrics panel is enabled on the BrassRing Welcome page for your user type, you can display the panel if it is not automatically displayed.

1. Select the +/- icon (  ).




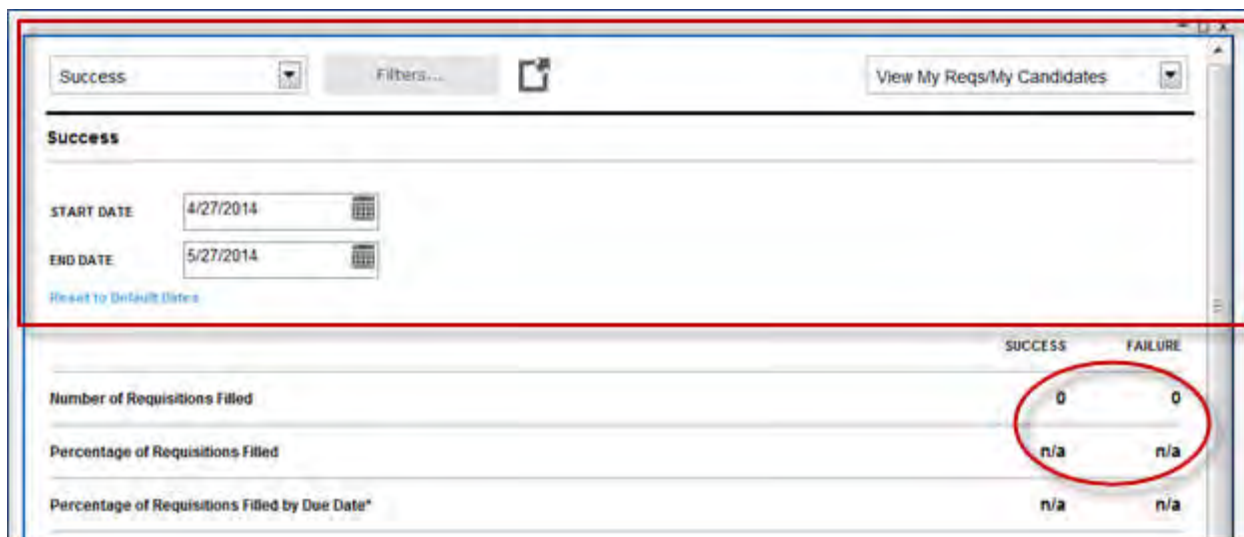
2. Select **Add Panel**.
3. Select **Metrics Panel 1**.



## Basic Metrics Panel View Controls

You have several features available for controlling the metrics views.

- Selector to change metrics view – simply select the desired view from the dropdown list
- **Filters** button – select to [set up your filtering](#) options
- PDF export icon – select the export icon (  ) beside the Filters button. The document includes any legends and data tables available in the view.
- **View My Reqs/My Candidates** selector – select to restrict view of the metrics to your own reqs and candidates (My Reqs/My Candidates). The restricted view is the default (and only option) if you do not have privileges to view “all” reqs (in all statuses). To view “all” if you have privileges, de-select.
- Title of displayed metrics view
- Date selector area for New Hires and Success metrics – you can also specify a date range for the data. The maximum is 365 days, which is the default. To result to the default start and end dates (current date), select **Reset to default dates**.



The screenshot shows the 'Success' metrics panel. At the top, there is a dropdown menu set to 'Success', a 'Filters...' button with a PDF icon, and another dropdown menu set to 'View My Reqs/My Candidates'. Below this, the 'Success' title is displayed. There are two date input fields: 'START DATE' with the value '4/27/2014' and 'END DATE' with the value '5/27/2014'. A link 'Reset to Default Dates' is located below the date fields. At the bottom, a table displays metrics for 'SUCCESS' and 'FAILURE'.

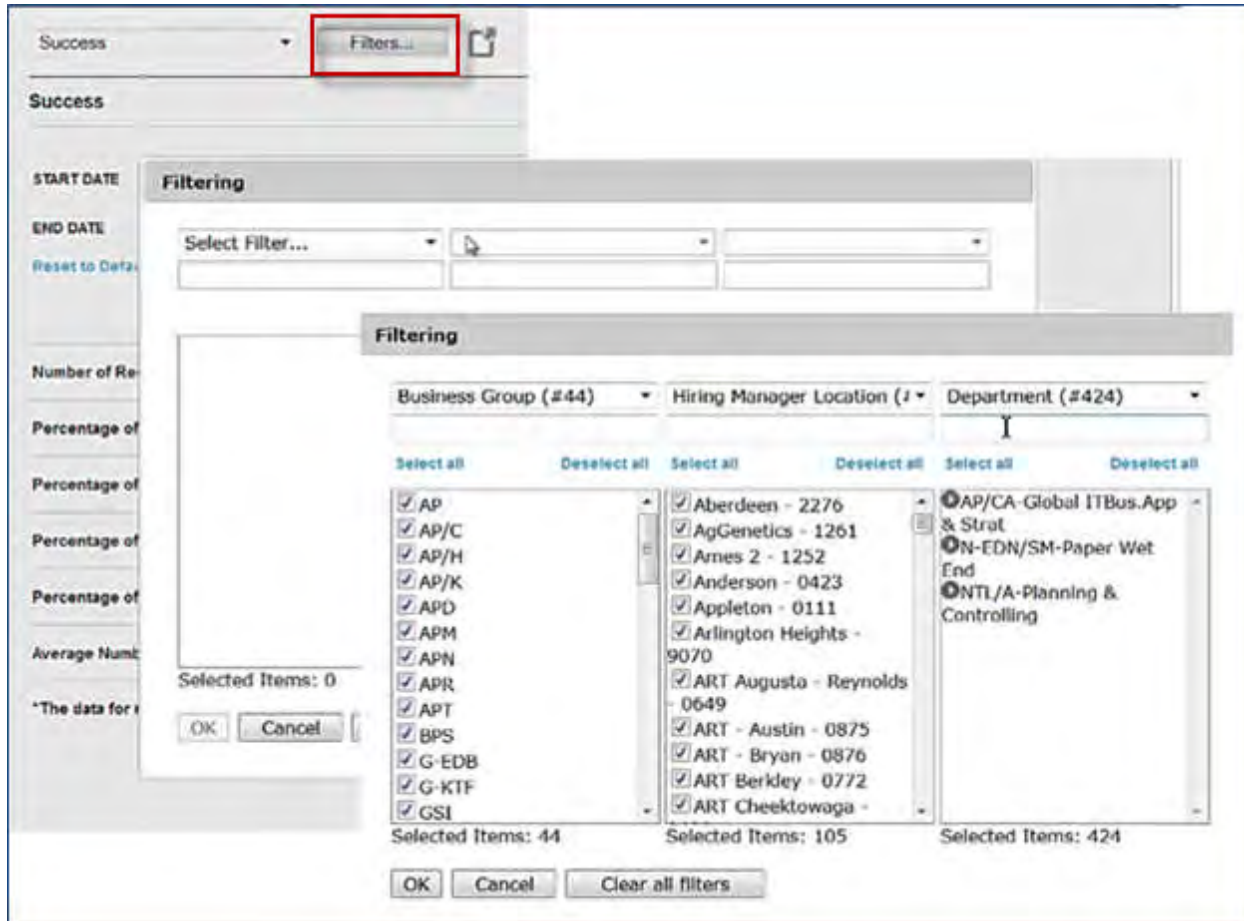
	SUCCESS	FAILURE
Number of Requisitions Filled	0	0
Percentage of Requisitions Filled	n/a	n/a
Percentage of Requisitions Filled by Due Date*	n/a	n/a

Data for the metrics are from the Data Insight Tool transform tables. Default values that can display if no data exists or is available for the calculation are: 0 or n/a (samples are shown in the preceding figure).

## Filtering

To set up to three fields to filter what data is presented, select **Filters**.

The filter field options depend on the fields configured in Workbench (in the Shared Settings Tab within Analytics Settings).



- Select your first filter – successive filters become selectable after you select the preceding one.
- Results are grouped in bunches of 200 when there are more than 200. Each subgroup is named according to its first value followed by the number of items in the subgroup (in parentheses): **Cost Center1 (200)**
- Filter selections persist until you clear them, change them, or log out of BrassRing.

While filters are loading:

- Large amount of filter data or a slow connection may slow the filter loading
- If an error occurs, the filter loading terminates and a message displays instructions about how to proceed
- You can use BrassRing while filters are loading, or if filters fail to load. All functions except filtering are still available.



Click the **Reload** button to try to reload the page in the application rather than in the browser. (Avoid refreshing the page with the browser while filters are loading because it restarts the filter loading process.)

## Metrics Display

The metrics views display a representation of the data based on the filters and dates you select.

- Graphs are displayed for Requisition Aging and Requisition Status.
- The remaining views appear are in the form of data tables.
- For most users, data will be taken only from My Reqs or My Candidates; only privileged users see data for all req or candidates.
- To view the data table for the graph displayed for Requisition Aging or Requisition Status metrics views, select **Show Data Table** hyperlink. To hide it when the data table is displayed, click **Hide Data Table**.

## New Hires

The New Hires metric is a count of hires in the selected date range.

This metric displays seven data elements in the form of a data table. The Position field of selected requisitions is used to determine if the requisition was a replacement or addition

Metric	Value
Positions Filled	1
Positions Filled(Addition)	0
Positions Filled(Replacement)	1
Applicants	1
Applicants Rejected Per One Offer Extended	n/a
Offers Rejected For Filled Reqs	n/a
Average Time To Fill	28

Metric	Formula
Positions Filled	Total number of positions filled (candidates hired) within selected date range - does NOT limit to completely closed req
Positions Filled (Addition)	Total number of positions filled (candidates hired) WHERE Type of position = "Addition" within selected date range - does NOT limit to completely closed req
Positions Filled (Replacement)	Total number of positions filled (candidates hired) WHERE Type of position = "Replacement" within selected date range - does NOT limit to completely closed req
Applicants	Total number of candidates filed to Open Req folders WHERE HR Status is NOT 0-Filed based on action date
Applicants Rejected Per One Offer Extended	Applications Rejected divided by Total Count of Offers Made to Applicants - based on action date

Metric	Formula
Offers Rejected For Filled Reqs	Offers Rejected (For filled Reqs) = Total Offers Extended (for reqs having Positions remaining = 0) minus Total Offers Accepted (for reqs having Positions remaining = 0)
Average Time to Fill	Sum of Time To Fill for Total Candidates Hired divided by Number of candidates for candidate hired within selected time frame, WHERE Time to Fill = [Date an HR action was taken to fill the position (End Date HR Status)] minus [Date the req was opened] minus [Total number days the req was on hold].

## Pipeline

(Applications + Average Days in Process)

This reports the count of the number of candidates in the selected HR Statuses on the selected dates. It includes only those candidates who are assigned to requisition folders.

This metrics view displays three data elements in the form of a data table.

Pipeline	
Total Applications	9
Average Number of Applications Per Unfilled Position	0.8
Average Number of Days Applicants Have Spent in Recruiting Process	57.7

Metric	Formula
Total Applications	Total Number of Candidates Filed to Open Reqs or On Hold Reqs Includes candidates who were in a req during the date range and are now removed from req
Average Number of Applications Per Unfilled Position	Average number of candidates in open and on hold per unfilled position (not per req) Includes candidates who were in a req during the date range and are now removed from req

Metric	Formula
Average Number of Days Applicants Have Spent in Recruiting Process	Average days that candidates in open and on hold reqs have been in recruiting process  More details: gets days in req for each candidate from first action date; averages the days per req (average is an integer; any decimal is dropped); then averages the req averages. 0-filed candidates ARE included - DOES include candidates that have been removed.

### Requisition Aging

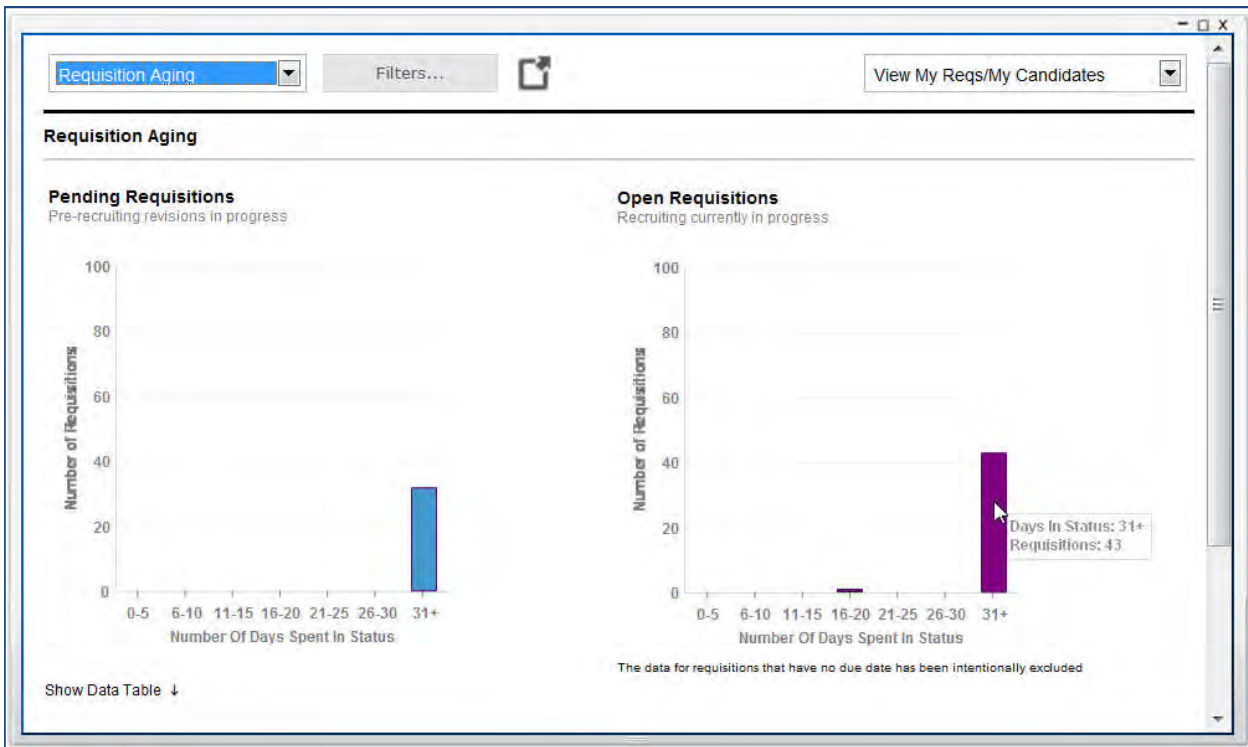
(Requisition Activity + Requisition Age)

This reports the average age (in days) for all open requisitions that are open during a selected time period. The Requisition Age is calculated by taking the total days a requisition has been open minus the days on hold.

This metrics view shows two bar graphs side-by-side for the specified period of time:

- Pending Requisitions (re-recruiting revisions in progress)
- Open Requisitions (recruiting currently in progress)

X-axis shows number of days spent in status. Y-axis shows number of requisitions. The data table format shows these as two columns:



Metric	Formula
Number of Requisition	Number of pending or open reqs, excluding Evergreen reqs. Not limited to 365 days.
Number of Days Spent in Status	Average of days pending or open. Not limited to 365 days

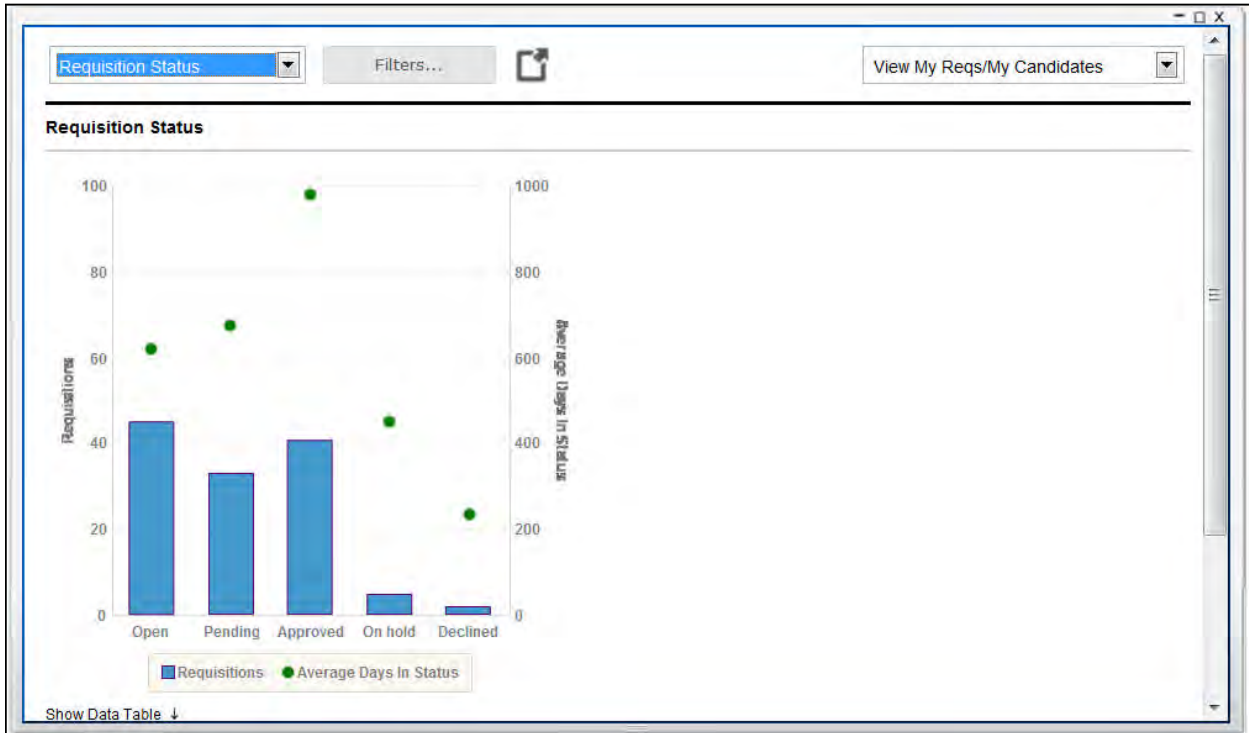
## Requisition Status

(Requisition Activity Volume + Average Times in Status)

This gives the count of requisitions that are in specific Requisition Statuses.

The Requisition Status metrics view contains the following statuses by volume on the x-axis: Open, Pending, Approved, On Hold, and Declined. The Average Days in Status is counted as the number of days between the start date and the end date for each status.

Y-axis shows the count of reqs as a bar, and the average time in the status (in days between the start date and the end date for each status) as a solid circle at the data point. The data table format shows two columns: Number of Days Spent in Status and Number of Requisitions



Metric	Formula
Status - Requisitions	Number of reqs in <i>status</i> , including Evergreen reqs WHERE <i>status</i> can be Open, Pending, Approved, On Hold, or Declined
Status - Average Days in Status	Average number of days in <i>status</i>

## Requisitions

This reports the count of requisitions that entered the status of Open or Closed during a selected time period. Only those requisitions that had an action taken on them are counted here.

Requisitions	
Pending Requisitions (Being written or awaiting approval)	33
Open Requisitions (Recruiting in progress)	9
On Hold Requisitions	5
Average Number of Days That Requisitions Have Been Open*	630

\*The data for Requisitions that have no due date has been intentionally excluded.

Metric	Formula
Pending Requisitions (Being written or awaiting approval)	Number of reqs currently in Pending status; includes Evergreen reqs
Open Requisitions (Active, with recruiting in progress)	Number of reqs currently in Open status; includes Evergreen reqs; each req must have at least 1 candidate in status other than 0-filed
On Hold Requisitions	On Hold Requisitions = Number of reqs currently On Hold; includes Evergreen reqs
Average Number of Days That Requisitions Have Been Open*	Req open from start date to current date; first day counts as 1 day and so on; excludes Evergreen reqs. Average does not exclude time on hold. *Data for Requisitions that have no due date is intentionally excluded.

### Success

This reports the count of offers accepted compared to offers declined in the selected date range. The data for requisitions that have no due date are intentionally excluded.



Success Filters...

---

**Success**

---

START DATE

END DATE

[Reset to Default Dates](#)

	SUCCESS	FAILURE
Number of Requisitions Filled	11	2
Percentage of Requisitions Filled	85%	15%
Percentage of Requisitions Filled by Due Date*	16%	69%
Percentage of Requisitions Filled Matching Original Description	100%	0%
Percentage of Requisitions Filled Without Any Delays on Hold	77%	8%
Average Number of Days Applicant Spent in Recruiting Process	1.7	0

\*The data for requisitions that have no due date has been intentionally excluded

Metric	Formula
Number of Requisitions Filled	<p><b>Success:</b> Number of reqs closed during the specified date range that had all positions filled.</p> <p><b>Failure:</b> Number of reqs closed during the specified date range, but with at least one position in each req remaining unfilled.</p>
Percentage of Requisitions Filled	<p><b>Success:</b> Percentage of total reqs closed during the specified date range that had all positions filled.</p> <p><b>Failure:</b> Percentage of total reqs closed during the specified date range that did not have all positions filled.</p>
Percentage of Requisitions Filled by Due Date*	<p><b>Success:</b> Percentage of total requisitions with a Due Date that were Filled</p> <p><b>Failure:</b> Percentage of total requisitions with a Due Date that were NOT Filled</p> <p>Due Date is a field selected in Workbench when the Success metric view is configured for your account.</p>
Percentage of Requisitions Filled Matching Original Description	<p><b>Success:</b> Percentage of of total requisitions that were not modified during Req Approval process (other mods don't count)</p> <p><b>Failure:</b> : Percentage of total requisitions that WERE modified during the Approval Process</p>

Metric	Formula
Percentage of Requisitions Filled Without Any Delays on Hold	<p><b>Success:</b> Percentage of closed reqs (whether filled or not) that were filled and closed AND HAD NO days on hold</p> <p><b>Failure:</b> Percentage of closed reqs (whether filled or not) that were filled and closed AND HAD days on hold PLUS Reqs closed but not filled</p> <p>Note: takes reqs that were in closed status during the given time frame; can include reqs that are reopened later</p>
Average Number of Days Applicant Spent in Recruiting Process	<p><b>Success:</b> Average number of days an applicant has spent in a req that has been closed</p> <p><b>Failure:</b> Average number of days an applicant has spent in a req that is cancelled</p> <p>For each candidate: measures from first action date in the req to the date the req was closed or cancelled</p> <p>If candidate spends less than 24 hours in process then average # of days will = 1 otherwise normal calculation will be used.</p>

## How Do Clients Get this Feature?

This feature is controlled by a client setting, analytics settings, and user type privileges, and requires a client maintenance ticket. Please contact our Support Team for more information about enabling this feature.

# Configuration Tasks

This section describes the tasks required to configure this feature. Tasks labeled Workbench Self Service can be performed by certified Workbench Self Service users or by our support staff.

**Note:** New clients must configure this new basic 6-view metrics panel. Clients with the older 12-view metrics panel should migrate to the new metrics panel by July 31, 2014. The 12-view metrics panel will be retired after that date.

1. Set [New UI Metrics client setting](#).
2. Configure [filter and metrics panels settings](#).
3. Assign [Analytics user type privileges](#).
4. [Map the metrics panel](#) views that members of each user type can display on the Welcome page.
5. BrassRing consultant arranges with BrassRing Engineering to have the data set generated once preceding steps are complete. Engineering notifies consultant once the file is in place and the Metrics Panel is ready to use.

## Client Settings – Workbench (Support Staff)

Renamed client setting: **New UI Metrics** (replaces the former **New UI Analytics** setting)

**Workbench > Select a client > Edit**

–OR–

**Workbench > Admin > Manage Clients > Edit client settings** [for selected client]



**On** - Enables configuration of the 6 new basic metrics panels in BrassRing.

- If Business Analytics client setting = Yes, 18 configurations tabs display in [Panel Configuration](#) – 12 pre-existing QlikTech metric tabs with the Business Analytics field, as well as the 6 new basic metrics panel tabs (which do not include Business Analytics field).
- If Business Analytics setting = No, pre-existing QlikTech metrics tabs are hidden.


**QlikTech** – (Available only for a limited time to accommodate migration to the new metrics) Allows existing clients to switch between metric panel engines, if required. When selected, all 12 pre-existing basic [metrics tabs](#) are displayed for panel configuration.

- If Business Analytics client setting = Yes, 12 pre-existing QlikTech metric tabs are displayed with Business Analytics field enabled.
- If Business Analytics = No, 12 pre-existing metric tabs are displayed with Business Analytics field disabled.

**Off** – New metrics panels (6) cannot be configured.

- If Business Analytics setting = Yes, 12 pre-existing QlikTech [metrics tabs](#) are displayed with Business Analytics setting enabled.

- If Business Analytics setting = No, no metrics panels at all are available. For panel configuration, users see this message in the Individual Metrics Settings: *This feature is not available because the New UI metrics has not been activated or it is not supported by the current software version.*



The current QlikTech metrics panels will be retired after July 31, 2014. Business Analytics is not impacted by this project, but will be retired in late 2014/early 2015.

IBM is working on providing Smarter Workforce Talent Analytics. Until this becomes available, clients can use custom analytics provided by Professional Service Engineering.

The Shared Settings tab is always displayed in Panel Configuration for all the preceding setting combinations.

## Analytics Settings – Workbench Self-Service (Tiers 7+)

Your BrassRing consultant can make new metrics panel views available for display on the BrassRing Welcome page. Analytics settings include a **Shared settings** tab for setting filter options across all metrics panels, and a tab for each of the metrics panels where you enable the individual metrics panel views:

**Tools > Settings > Analytics Settings**

### Setting Filter Options

On the Shared settings tab, select the appropriate filters in the **Common Filter Fields** section and then enter a **Filter Label** for each **Filter Field**.

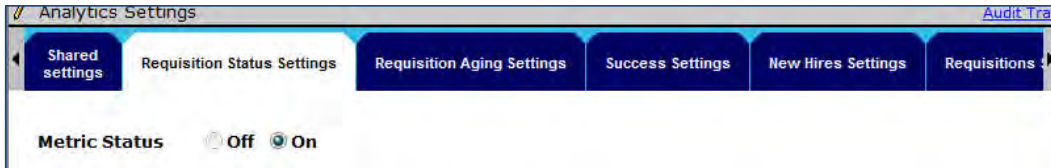
If you have additional locales in use, enter localized content for the the entries in the **Definitions** section.

## Setting Metrics Panel Views

Navigate to each desired metrics panel view tab to enable it for users. For most views you only select **On**. Click **Save** as you complete settings on each tab.

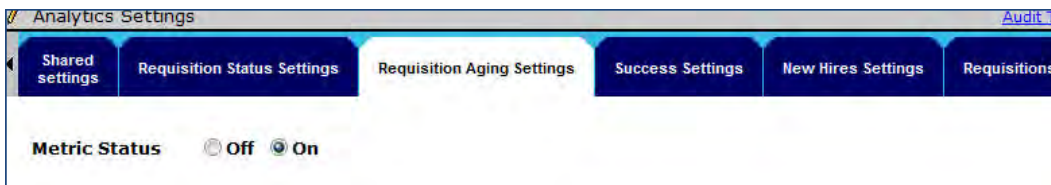
### Requisition Status Settings

Select **On** to enable in user type privileges and on BrassRing Welcome screen for privileged users.



### Requisition Aging Settings

Select **On** to enable in user type privileges and on BrassRing Welcome screen for privileged users.



### Success Settings

Select **On** to enable in user type privileges and on BrassRing Welcome screen for privileged users.

Select a field that defines the “Due Date” from the list of your standard and custom req date fields. Otherwise users see n/a as the output value for Requisition Due Date field; as all calculations are dependant on the selection of the Due Date field.



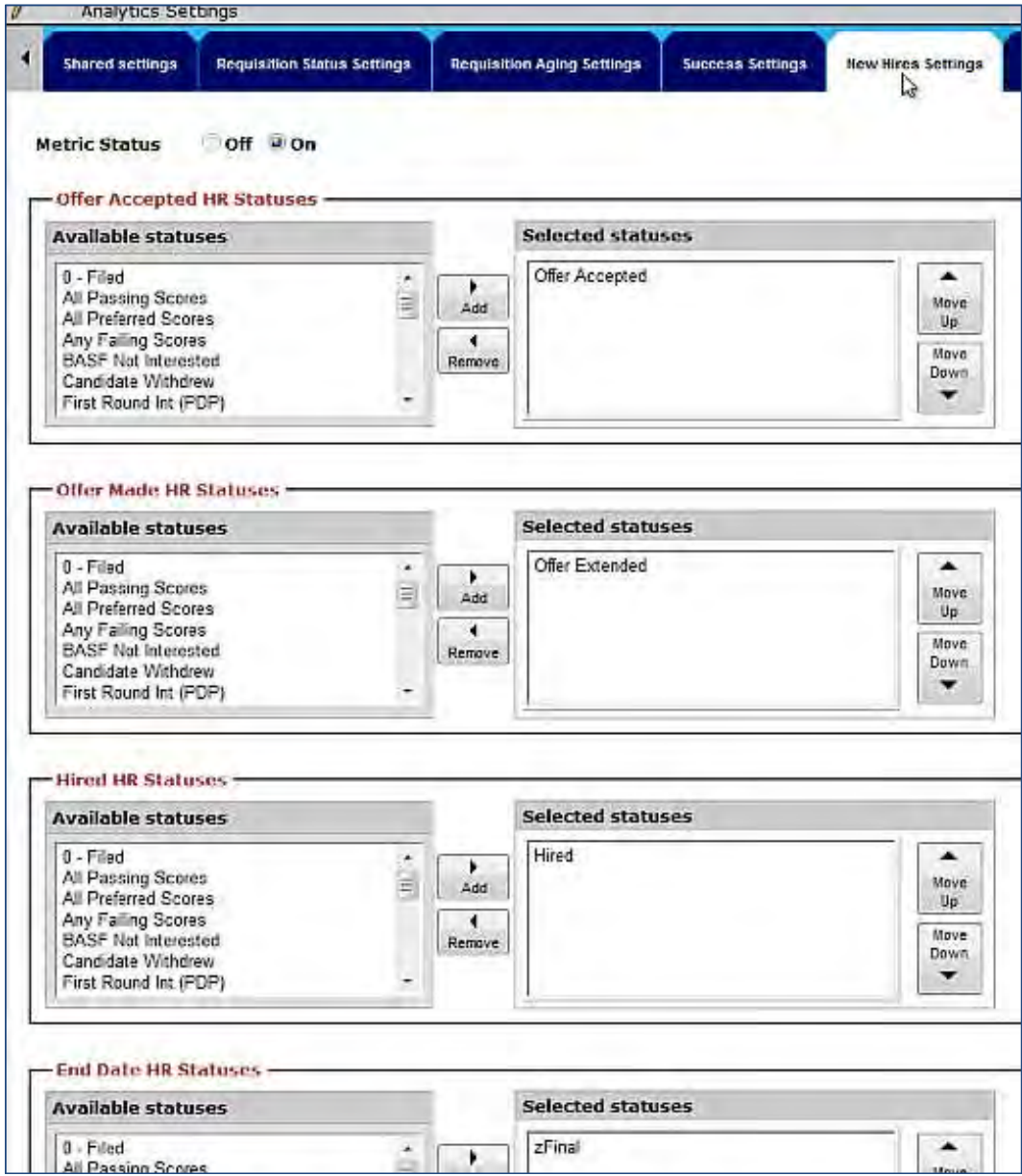
### New Hire Settings

Select **On** to enable in user type privileges and on BrassRing Welcome screen for privileged users.

Select HR statuses that are representative of each category – **Offer Accepted**, **Offer Made**, **Hired**, and **End Date**.

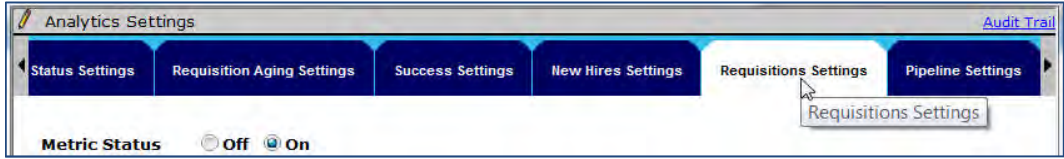
Note: Please ensure that unique values of HR status are selected for each field. Selecting the same values for different HR status could lead to incorrect calculations and/or give incorrect metrics.





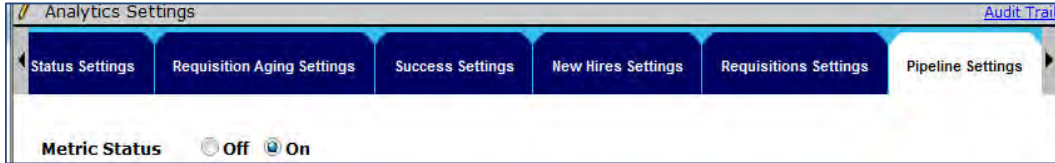
**Requisitions Settings**

Select **On** to enable in user type privileges and on BrassRing Welcome screen for privileged users.



**Pipeline Settings**

Select **On** to enable in user type privileges and on BrassRing Welcome screen for privileged users.



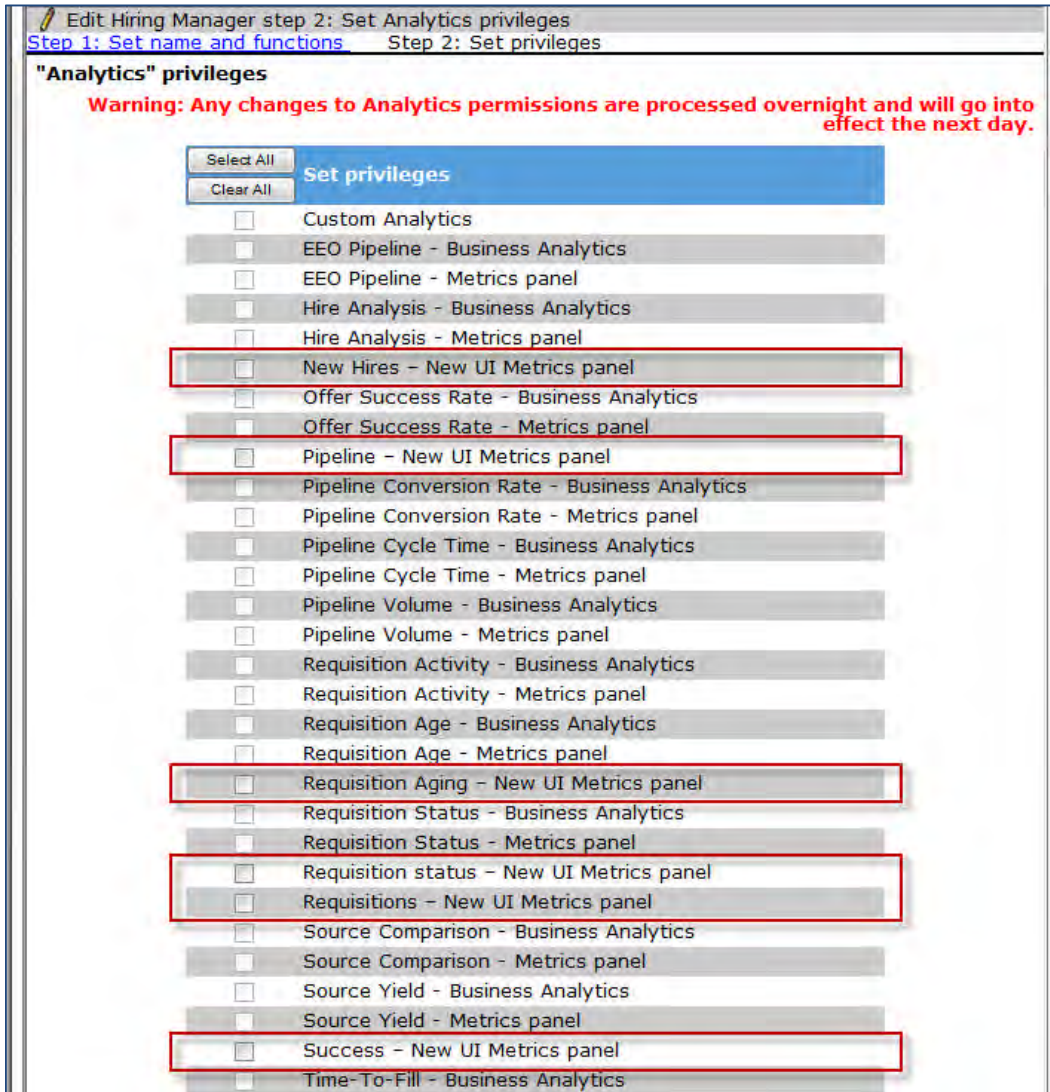
## User Type Privileges – Workbench Self-Service (Tiers 1+)

After configuring metric panels settings, enable privileges for BrassRing user types so they see metrics that are relevant. User type privileges for New UI Metrics panel views are included in the Analytics function group.

**Workbench > Tools > Users > User types > Edit type permissions [for selected type] > Analytics**

Check desired metrics panel view to allow users to access it:

- **New Hires – New UI Metrics panel**
- **Pipeline – New UI Metrics panel**
- **Requisition Aging – New UI Metrics panel**
- **Requisition status – New UI Metrics panel**
- **Requisitions – New UI Metrics panel**
- **Success – New UI Metrics panel**

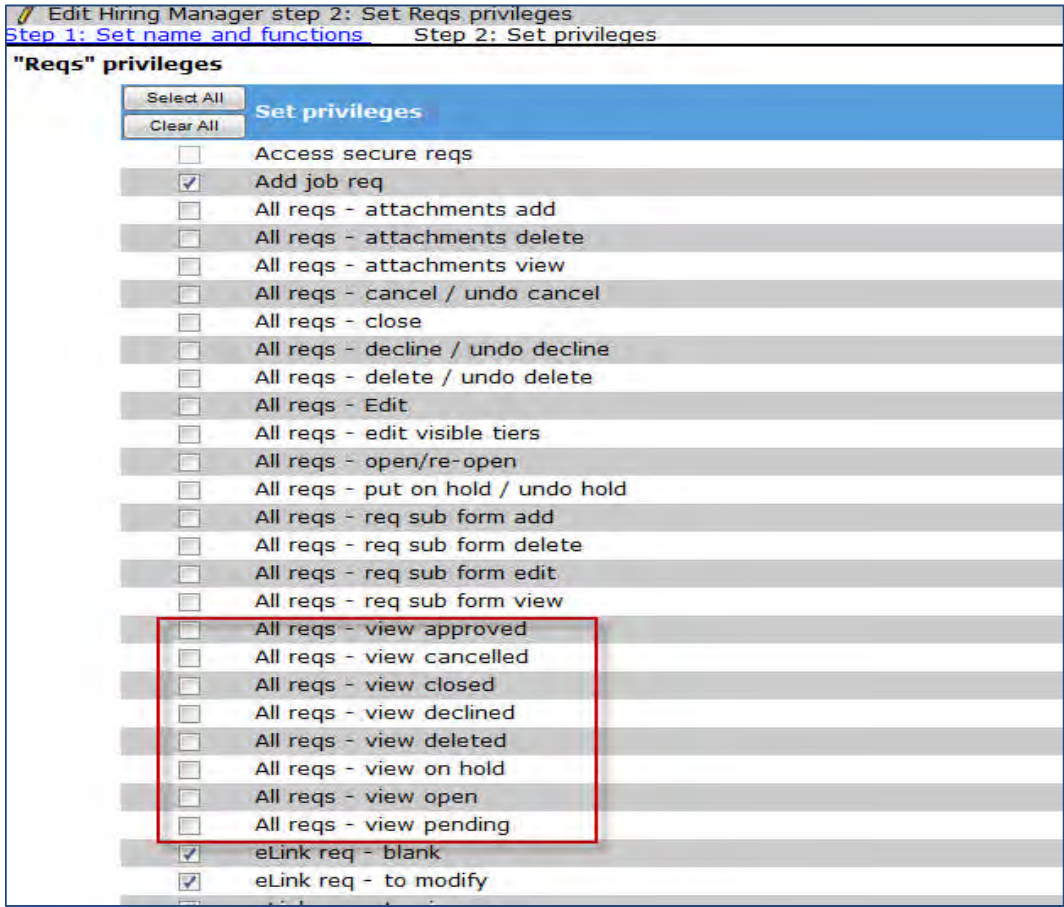


Grant the following Reqs privileges to users types who need to switch between viewing My Reqs/My candidates data or All Reqs/All Candidates data in all the views.

**Workbench > Tools > Users > User types > Edit type permissions [for selected type] > Reqs**

- All-reqs – view approved
- All-reqs – view cancelled
- All-reqs – view closed
- All-reqs – view declined
- All-reqs – view deleted
- All-reqs – view on hold
- All-reqs – view open
- All-reqs – view pending





### Panel Mapping – Workbench Self-Service (Tiers 4+)

For each user type that will have a metrics panel on their Welcome Page, you must define the default placement and select the starting metrics view. BrassRing users can select different metrics views from the drop-down list at the top of their metrics panel display.

**Tools > Users > User types > User type panel mapping** [for selected user type]

User type panel mapping

Push panels to interior pages

Layout template: 2 Columns

Panel	Panel type	Configuration	Layout
<b>All Req's</b>			
<input checked="" type="checkbox"/> All Open Req's	Default	CUS:MASTER Enhanced	Right1
<input checked="" type="checkbox"/> All Req's Pending Approval	Default	CUS:MASTER Enhanced	Right2
<b>My Req's/Candidates</b>			
<input checked="" type="checkbox"/> Candidate Results	Optional	CUS:VKH All Translated F	--Select--
<input checked="" type="checkbox"/> My Candidates	Optional	STD:Advanced View	--Select--
<input checked="" type="checkbox"/> My Open Req's	Default	CUS:MASTER Enhanced	Left2
<input checked="" type="checkbox"/> My Req's Pending Approval	Default	CUS:MASTER Enhanced	Left3
<input type="checkbox"/> My Tasks	Optional	--Select--	--Select--
<b>Other</b>			
<input type="checkbox"/> All/My Req's - All Other Statuses	Interior	--Select--	--Select--
<input checked="" type="checkbox"/> My Calendar	Optional	STD:Basic View	--Select--
<input checked="" type="checkbox"/> Quick Links	Default	CUS:Has all but 1 QL cate	Left1
<input checked="" type="checkbox"/> Welcome Message	Optional	CUS:Demo Welcome	--Select--
<b>Analytics</b>			
<input checked="" type="checkbox"/> Metrics Panel 1	Optional	--Select--	--Select--
<b>Integration</b>			

Select **Metrics Panel 1** and configure the settings for it using the information in the following table.

User Type Panel Mapping, Analytics Section			
	Panel Type	Configuration	Layout
Analytics			
Metrics Panel 1	<p>Select <b>Default, Optional, or Required</b>.</p> <p>Default panels display until the BrassRing user removes them.</p> <p>Optional panels are listed in Add/Remove panel list, but do not display unless the BrassRing user adds them.</p> <p>Required panels display for new users and users who have made no changes to their panel layout. For users who have made such changes—if you override user changes, they appear; if you preserve user changes, they are listed in Add/Remove panel list</p>	<p>Select the starting metrics view for display on the Welcome Page if more than one has been activated. Default is by alphabetical listing among views enabled for the user type.</p>	<p>Select the placement of the panel. Your selection here depends on the layout of other Welcome Page panels configured for each user type.</p>

# New UI – Updated Req Listing Pages

The Req listing pages have been updated with panel technology. New ease-of-use features provided by that technology include: default sort, configurable grids based on user type, filtering, and Req preview.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> LDP 227	<input checked="" type="checkbox"/> BrassRing	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact our Support Team for implementation details.	

## Feature Description

Updates to the Req listing pages with panel technology provide many advantages for users. Welcome page panel features such as default sort, configurable grids based on user type, filtering, and Req preview are now also available for the “interior” BrassRing pages. (Interior Req listing pages are the ones to which users navigate via the Reqs menu or via Req Search results or Req Quick Search results.) Users now see a consistent panel view of candidates, from Reqs in open, pending, and the various closed statuses, as well as from Req Search results. The newer panel technology also reduces issues that users with newer browsers may have encountered previously.

Menu contents and behavior remain the same in panel and classic format, as well as pagination and the showing of results. Two visible changes introduced with this update are:-

- New **Update All in Selected Status** action menu item on the Candidate Results panel.
- For Req Preview on the existing All/My Reqs Pending Approval panels, the Date Opened label and value are replaced by **Date Created** label and the date the Req was created.

## BrassRing User Experience

When you select a Req listings page from the Reqs menu, or use Req Search or Quick Search > Reqs, a maximized panel view of the resulting Req set opens instead of the classic grid pages.

The new panels for the additional Req statuses (Closed, On Hold, Canceled, Deleted, Approved, Declined, All Stages) are the same as their equivalent classic grids with respect to:-

- Menu contents and behavior
- Pagination
- Displaying results in the grid
- Launching the Candidate Results panel
- Requiring applicable existing user type view privileges.

The differences between the new panels and the equivalent classic grids are:-

- Panel title
- Close icon is not present in the listing view
- Help link has moved from the title of the classic page to panel controls,. When clicked, the link still opens the existing context-sensitive help window.

The Minimize and Maximize icons display as disabled until a Candidate Results panel is launched.

## Open Reqs Panel

Users must have the equivalent Req panel mapped (either “All Reqs Open” or “My Reqs Open”), but not necessarily displaying on their Welcome page. The configuration of the applicable equivalent panel is applied.

Persistence for filter menu and sort options exists in both panels (“All Reqs Open” or “My Reqs Open”), whether it is opened from Welcome page or the navigational view. That is, a filter or sort options that are set in either Welcome page or interior panel view applies to the other.

Changes can be made via **Edit Columns** from the Welcome page or interior view and apply on both views.

### Reqs > View All/My Reqs > Open

Auto	Job Title	Total	Posting	Date Created	Req Template	Language	Date Opened	Dest	Attachments	Forms	Notes	Location/Division	Manager	Bold	CL
2983BB	test	0		01-Jul-2014	!!!!HarshaTimeZoneTest	English (US)	01-Jul-2014				+	100 East	aditterrow, karthik (		
2982BB	Saved as new_Database Admin - melbourne	0		18-Jun-2014	Validation_testing	English (US), French	18-Jun-2014		+		+		manager, raj (		
2981BB	Saved as new_Manager Machine _ Adelaide	0		18-Jun-2014	Validation_testing	English (US)	18-Jun-2014		+		+		manager, raj (		
2980BB	Saved as new_Place Guide123	0		18-Jun-2014	Copy of !Req_RFA_ramesh	English (US)	18-Jun-2014				+		aditterrow, karthik (SRT73)		
2978BB	ggg_edited	0		18-Jun-2014	!!!!Pavanest	English (US)	18-Jun-2014				+		Arya, Pavan (		
2977BB	Cog Engineer IST	0		06-Jun-2014	!!!!HarshaTimeZoneTest	English (US)	06-Jun-2014				+		k, raj (		
2976BB	Manager Machine _ Adelaide	0		06-Jun-2014	Validation_testing	English (US)	06-Jun-2014		+		+		manager, raj (		
2975BB	Database Admin - melbourne	0		06-Jun-2014	Validation_testing	English (US), French	06-Jun-2014		+		+		manager, raj (		
2974BB	test	0		04-Jun-2014	!!!!HarshaTimeZoneTest	English (US)	04-Jun-2014				+	100 East	aditterrow, karthik (		

## Pending Req Panels

Users must have the equivalent Req panel mapped (either “All Reqs Pending” or “My Reqs Pending”), but not necessarily displaying on their Welcome page. The configuration of the applicable equivalent panel is applied.

Persistence for filter menu and sort options exists in both panels (“All Reqs Pending” or “My Reqs Pending”), whether it is opened from Welcome page or the navigational view. That is, a filter or sort options that are set in either Welcome page or interior panel view applies to the other.

Changes can be made via **Edit Columns** from the Welcome page or interior view and apply on both views.

### Reqs > View All/My Reqs > Pending

Auto	Job Title	Date Created	Manager	Bold	CL	Recruiter	Approve	Next App	Attachments	Forms	Req ID	CL	newirradioDISPLAYFIELDNAME	newidateDISPLAYFIELDNAME	newnumericDISPLAYFIELDNAME
2971BB	Spinner Check Incharge - classic	28-May-2014	k, raj (			K, Raj (	✓	Koka, Raj (	+	+	may28				
2340BB	Test Req	26-Sep-2013	Alexovich, Danielle (SRT81)			Ahmed, Ann (SRT76)	✓	Koka, Raj (	+	+	23232323				
1880BB	Planning Engineer EN	13-Feb-2013	german, pradeep (KT 4150)			rec, raj (		Koka, Raj (	+	+					
6290BB	Eng Manager Special Party	07-Feb-2013	french canadian user, pradeep (			rec, raj (	✓	Koka, Raj (	+	+					
8637BB	sdfsd	15-Jan-2013	Koka, Raj (			Koka, Raj (		Koka, Raj (	+	+	7thMarcl				

## Approved Req Panels

### Reqs > View All/My Reqs > Approved

User must have the “All/My Reqs – All Other Statuses” panel mapped, with the option “**Push panels to interior pages**” set.

The following are exceptions for this Approved status for configured columns in this view:

- Posting Options does not display
- Req Status does not display
- Total Candidates always displays as a 0 and is not linked.
- Date Opened displays the text of "Date Approved."

Action menu items are the same as that of the classic view, with the following changes:

- Newly added action item is **Open** (requires appropriate existing user type privileges, Reqs > All reqs - open/re-open, or My Reqs > My reqs - open/re-open).
- Update multiple Reqs action item is not supported in this new panel (that is, you cannot select multiple reqs and then select **Edit**)
- View printable page action item is not supported, since it does not apply to this grid.

Filter menu contents and behavior remains the same, except that the “Date Opened” filter is not available in this view.

### Closed Req Panels

#### Reqs > View All/My Reqs > Closed

User must have the “All/My Reqs – All Other Statuses” panel mapped, with the option “**Push panels to interior pages**” set.

The following are exceptions for this Closed status for configured columns in this view:

- Req Status does not display
- Date Opened displays the text of "Date Closed."

Within the Candidate Results panel for Closed status (accessed via the “Total Candidates” linked number), the HR Status editor is disabled in the column for Update HR Status.

Action menu items are the same as that of the classic view, with the following changes:

- Newly added action item is **ReOpen** (requires appropriate existing user type privileges, Reqs > All reqs - open/re-open, or My Reqs > My reqs - open/re-open).
- Update multiple Reqs is not supported
- View printable page is not supported
- Update HR Status is disabled

### On Hold Req Panels

#### Reqs > View All/My Reqs > On hold

User must have the “All/My Reqs – All Other Statuses” panel mapped, with the option “**Push panels to interior pages**” set.

The following are exceptions for this On hold status for configured columns in this view:

- Req Status does not display
- Date Opened displays the text of "Date On Hold."

Within the Candidate Results panel (launched from the linked number in the “Total Candidates” column) for On hold status, the HR Status editor is disabled in the column for Update HR Status.

Action menu items are the same as that of the classic view, with the following changes:

- Update multiple Reqs action item is not supported
- View printable page action item is not supported



- Update HR Status action item is disabled.

### Canceled Req Panels

#### Reqs > View All/My Reqs > Canceled

User must have the “All/My Reqs – All Other Statuses” panel mapped, with the option “**Push panels to interior pages**” set.

The following are exceptions for this Canceled status for configured columns in this view:

- Req Status does not display
- Date Opened displays the text of "Date Canceled"

Action menu items are the same as that of the classic view, with the following changes:

- Newly added action item is **Undo Cancel** (requires appropriate existing user type privileges, Reqs > All reqs – Cancel/Undo cancel or My Reqs > My reqs – Cancel/Undo cancel)
- Update multiple Reqs action item is not supported
- View printable page action item is not supported

### Deleted Req Panels

#### Reqs > View All/My Reqs > Deleted

User must have the “All/My Reqs – All Other Statuses” panel mapped, with the option “**Push panels to interior pages**” set.

The following are exceptions for this Deleted status for configured columns in this view:

- Req Status does not display
- Date Opened displays the text of "Date Deleted"

Action menu items are the same as that of the classic view, with the following changes:

- Newly added action item is **Undo Delete** (requires appropriate existing user type privileges, Reqs > All reqs – Delete/Undo delete, or My Reqs > My reqs – Delete/Undo delete)
- Update multiple Reqs action item is not supported
- View printable page action item is not supported

### Declined Req Panels

#### Reqs > View All Reqs > Declined

User must have the “All/My Reqs – All Other Statuses” panel mapped, with the option “**Push panels to interior pages**” set.

The following are exceptions for this Declined status for configured columns in this view:

- Posting Options does not display
- Req Status does not display
- Date Opened displays the text of “Date Declined”

Action menu items are the same as that of the classic view, with the following changes:

- Update multiple Reqs action item is not supported
- View printable page action item is not supported

### All Stages Req Panels

User must have the “All/My Reqs – All Other Statuses” panel mapped, with the option “**Push panels to interior pages**” set. The user must have view access to every status except Declined in order for this panel to appear. If

the user does not have access to declined reqs, then the panel does not display reqs that are in a Declined status.

The following are exceptions for this All stages status for configured columns in this view:

- Posting Options does not display
- Date Opened displays the text of "Date Created"
- If configured, "Req Status" column displays the status of each Req as it is worded in the status name navigation (except On hold status displays as "On Hold" rather than "Hold")

Action menu items are the same as that of the classic view, with the following changes:

- Actions that do not apply to a Req status are disabled when the Req is selected.
- Update multiple Req's action item is not supported
- View printable page action item is not supported
- If two Req's of different statuses are selected, the **Edit** action item is disabled.

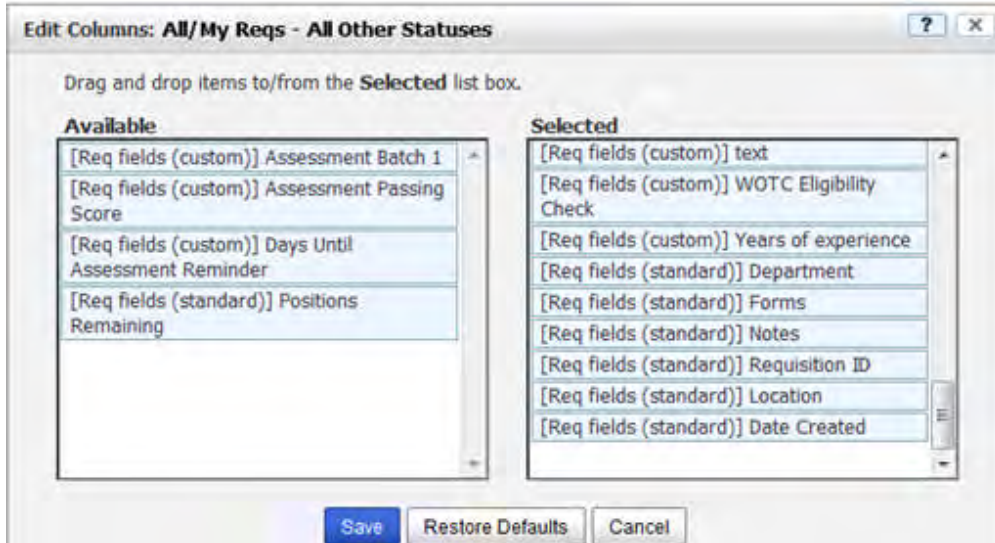
### Reqs > View All/My Req's > All stages

EH AutoReqId CL	Title	No. of P	Req Status	Manager	Recruiter	Attachments	Language	Does It	Evergreen	Is It
66788	Accountant II	1	Open	Picard, Sean Luc	Sunderam, Sathyenthann	+	English (US)	No		Yes
67388	Accountant II	1	Open	Buckley, Laurel	Scully, Dana	+	English (US)	No		Yes
67988	Accountant II	1	On Hold	Buckley, Laurel	Sunderam, Sathya	+	English (US)	No		Yes
71788	Accountant II	1	Canceled	Scully, Dana	Kubicki, Janet		English (US)			
70888	Allen Services	1	Open	Rothman-Shore, Jeremy	Sheppard, Trina	+	English (US)			
70988	Allen Services	1	Open	Sheppard, Trina	Sheppard, Trina	+	English (US)			
69788	Allen Translator	1	Open	Scully, Dana	Sheppard, Trina	+	English (US)	Yes		Yes
66488	Allen World Negotiator	1	Canceled	Barre, Pradeep	Niarhos, Wes	+	English (US)	Yes		Yes
66388	Allen World Negotiator	1	Declined	Hitterman,	Buckley,	+	English	Yes		Yes

### Edit Columns

For all req statuses besides Open and Pending, columns have a common configuration, for which the default is configured in Workbench.

When users launch the "Edit Columns" widget from one of these "other" statuses, the widget title appears as "All Other Statures." Changes made in any status will apply to the others.



### Req Search and Req Quick Search Results Panel

The columns for these Search Results panels are determined by the panel configuration that is selected for the user type in the panel mapping for “All/ My Reqs – All Other Statuses.”

- Column “Date Opened” displays the text as “Date Created”
- If configured, “Req Status” column displays the status of each Req as it is worded in the status name navigation.
- Only the Action and Display menus are available; the Filter menu is not applicable. Language acts as default “All” filter, displaying *all reqs that meet search criteria regardless of language*. When a Req has not been created in the display language, the first language for which the Req has a translation (in order on the list of languages) is displayed.

Action menu items are the same as that of the classic view, with the following changes:

- Actions that do not apply to a Req status are disabled when the Req is selected.
- Update multiple Reqs action item is not supported
- View printable page action item is not supported
- If two Reqs of different statuses are selected, the **Edit** action item is disabled.
- Display menu has two new menu items: **Refine Search** and **View Search Criteria**

The following two figures show the Search Results panels for Reqs Search from the Reqs menu and from the Quick Search control.

**Reqs > Search reqs > [select criteria] > Search**



Req Search Results

Records 1 - 50 of 286 Results Per Page 50

Auto req	Job Title/CL	Posting	Attachments	Date Created	Req Statu	Language	Forms	Req Template	Total	Dept	Location/Division	Notes	Manager/Bold/CL	Recruiter CL
7983BR	test			01-Jul-2014	Open	English (US)	+	!!!!HarshaTimeZoneTest	0		100 East		adttretrow, karthik ()	Abbott, french (SRT69)
7974BR	test			04-Jun-2014	Open	English (US)	+	!!!!HarshaTimeZoneTest	0		100 East		adttretrow, karthik ()	Abbott, french (SRT69)
7957BR	Test approval routing via interior panels		+	09-May-2014	Approved	English (US)	+	Approval Req w Notes Tab - template name to exceed width of 200 pixels in 2XB	0	Billing	100 East	+	Skywalker, Luke (LSR2D2)	Hitterman, Dominic (080907)
7952BR	US1		+	30-Apr-2014	Pending	English (US)	+	Align Center - Opt Vert - Labels Left	0	2 Alpha	100 East	+	Florence, Robin (rf1234)	Florence, Robin (rf1234)

Search Reqs > [enter criteria] >

Search Candidates

Search Reqs abc

Req Search Results

Records 1 - 1 of 1 Results Per Page 50

Auto req	Job T	Posting	Attachments	Date Created	Req Statu	Language	Forms	Req Tem	Total	Dept	Location/Division
5353BR	abc		+	06-Apr-2012	Approved	English (US)	+	Req Contains All Types of Custom Fields	0		

### Update All in Selected Status Action

The new **Update All in Selected Status** action item is now available on the Candidate Results panel when opened from either the Welcome page Req panels or the panels via navigational view, as well as on the My Candidates panel.

Candidates in: 0-Filed

Update All in Selected Status

Update same status - Mozilla Firefox IBM Edition

7324BR: Test & Test

Deselect any candidates that should not be updated.

Alen, Chris

Bobker, Steven

Current status 0-Filed

Hired

Company Not Interested - Does Not Meet Best Qualifications

LD-@=#%\*^&()\_(-):;~!@000

Hired with Auto Countdown

Raj\_On the Consideration

Action date: 10 Jul 2014

Notify users working with this candidate

Update Update and add next Close Window

To update all candidates with a particular status:

1. Select a candidate with the status to be updated.

2. Select **Update All in Selected Status** action. All candidates with the same status on the current page are automatically included. The classic “Update same status” window opens. (This is the same window that opens when you select the Update Status action.)
3. Follow the usual steps for that page: deselect any candidates whom you don’t wish to update; select the update status, a different action date if desired, and the notify option if desired; select **Update** or **Update and add next**, as desired.

Status cannot be updated using this action item when:-

- No candidate is selected
- Multiple candidates with different HR statuses are selected
- Multiple candidates from different folders are selected

### Req Preview

The Req preview displays for all the maximized Reqs panels you open from the Reqs menu.



The only difference from the Req preview in the Welcome page panels is that the label “Date Opened” is renamed appropriately for the panel and displays the corresponding date. The new labels are listed in the following table.

Panel	New label for Date Opened
All stages	For every Req in this panel, the label reflects the current status of the Req that is being previewed
Pending	Date Created
Approved	Date Approved
Open	Date Opened
Closed	Date Closed
On hold	Date put on hold
Canceled	Date Canceled
Deleted	Date Deleted
Declined	Date Declined

## How Do Clients Get this Feature?

Panel technology is enabled for Req listings automatically. User Type Panel Mapping configuration controls “other status” panels at the user-type level. Please contact your BrassRing Support Team for more information about enabling this feature.

# Configuration Tasks

This section describes the tasks required to configure this feature. Tasks labeled Workbench Self Service can be performed by certified Workbench Self Service users or by our support staff.

1. [Configure new All/My Reqs - All other statuses panel](#). You can introduce this feature at the user-type level by mapping only for selected user types.
2. [Map new All/My Reqs - All other statuses panel](#) for desired user types.

## Panel Configuration – Workbench Self-Service (Tiers 4+)

A new Standard Basic View configuration of the “All/My Reqs – All Other Statuses” panel is available. It is the configuration that is applied for all Req statuses to which users navigate from the Reqs menu, except Pending and Open.

**Tools > Settings > Panel Configuration > Administer configuration [for All/My Reqs – All Other Statuses] > Add new configuration/Save configuration as new [for selected name]/Edit [for selected name]**

**Configured fields**

#	Actions	Selected field	Column label
1	[Trash]	[Req fields (standard)] Auto req ID [Select field]	Auto req ID [View translations]
2	[Trash]	[Req fields (standard)] Job <b>Title</b> [Select field]	Job <b>Title</b> [View translations]
3	[Trash]	[Panel standard] Candidate count - Total [Select field]	Total [View/Edit translations]
4	[Trash]	[Panel standard] Posting Options [Select field]	Posting Options [View/Edit translations]

- Add custom configurations to include other desired Req fields (no HR Status fields or Candidate fields will display)
- Some columns may not appear for some statuses if configured, as noted in the new panel exceptions in the *BrassRing User Experience* section.
- **Candidate Count – Total** field is used to launch the Candidate Results panels for Req statuses that allow Req folder access

To add a field, use .../Edit [for selected name] > Add row (if desired) > Select field

## Panel Mapping – Workbench Self-Service (Tiers 4+)

When you map the **All/ My Reqs – All Other Statuses** panel for a user type, BrassRing displays all the Req listing page panels (via the Req menu navigation as well as Req Search and Req Quick Search results) in maximized panel view.

**Tools > Users > User types > User type panel mapping [for selected user type]**

User type panel mapping Audit Tr

**User type: Hiring Manager**

\* **Welcome page title** This is the title that will appear at the top of the welcome page for this user type. Note that the character limit is 40. [Show Me](#)

tester [English (US)]

**Push panels to interior pages**

Layout template: 2 Columns

Select All	Panel	Panel type	Configuration	Layout
Clear All				
<b>All Reqs</b>				
<input type="checkbox"/>	All Open Reqs	Restricted	--Select--	--Select--
<input type="checkbox"/>	All Reqs Pending Approval	Restricted	--Select--	--Select--
<b>My Reqs/Candidates</b>				
<input type="checkbox"/>	Candidate Results	Optional	--Select--	--Select--
<input type="checkbox"/>	My Candidates	Optional	--Select--	--Select--
<input type="checkbox"/>	My Open Reqs	Optional	--Select--	--Select--
<input type="checkbox"/>	My Reqs Pending Approval	Optional	--Select--	--Select--
<input type="checkbox"/>	My Tasks	Optional	--Select--	--Select--
<b>Other</b>				
<input checked="" type="checkbox"/>	All/My Reqs - All Other Statuses	Interior	--Select--	--Select--
<input type="checkbox"/>	My Calendar	Optional	--Select--	--Select--

For each desired user type:

1. Set the new **Push panels to interior pages** option.
  2. Check **All/My Reqs - All Other Statuses**.
  3. Select the desired configuration, STD Basic View or any custom configurations. Panel type value is Interior and Layout is disabled.
- Make sure the appropriate Req Open and Pending panels are mapped before saving (otherwise you see an error message). That is, if user type has My Reqs - View Open privilege, then that type must have My Open Reqs panel mapped; user types with All Reqs - View Open privilege must have All Open Reqs mapped; user types with My Reqs - View Pending or All Reqs - View Pending privileges must have corresponding My Reqs Pending Approval or All Reqs Pending Approval panels mapped.
  - "Interior" is a new panel type for the new panel only.
  - You can select or de-select the **Push panels to interior pages** option at any time to control the user view.



# Rapidhire – Posting Reqs to BrassRing Talent Gateways

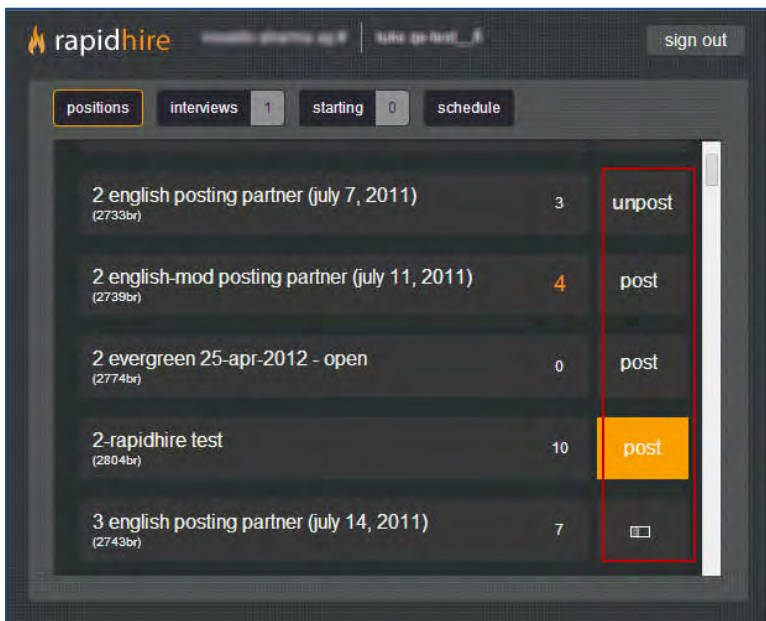
This feature allows users to post/unpost requisitions from within Rapidhire to a default set of BrassRing Talent Gateways.

IBM® Kenexa® BrassRing® on Cloud Release 14.0	
<b>Feature Areas</b> RDP 1028	<input checked="" type="checkbox"/> Rapidhire
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact our Support Team for implementation details.

## Feature Description

IBM® Kenexa® Rapidhire helps users in their search for candidates based on hourly availability. Users can send communications and hire candidates easily from Rapidhire. The new feature adds the ability of posting and unposting requisitions to preset BrassRing Talent Gateways from within Rapidhire. All BrassRing users with required access to Rapidhire and the post/unpost privilege have access to this feature.

## Rapidhire User Experience



To post or unpost requisitions from Rapidhire, click the appropriate new action, **post** or **unpost**.

- Selecting **Post** posts the requisition. If not previously posted, the req posts to the default Talent Gateway. If it has been posted previously, the req posts to the same set of Talent Gateways to which it was previously posted. (Additionally, the **post** action label changes to **unpost** and the background color of the button also changes.)
- Selecting **Unpost** removes the requisition posting (and also changes the action label and background color).

## Limitations and Known Issues

- In the full BrassRing application, posting dependencies are enforced real-time at the point of posting; those business rules will be ignored for Rapidhire post actions.
- Posting restrictions based on the users' OrgGroup are ignored. Any BrassRing Talent Gateways to which the requisition was previously posted is used for posting once again when users repost, regardless of their Org Group.
- Featured Job is not maintained once unposted.

## How Do Clients Get this Feature?

This feature is controlled by a new user type Rapidhire setting. Users with the setting configured can access this feature. Please contact our Support Team or your Certified Workbench User for more information.

# Configuration Tasks

This section describes the tasks required to configure this feature. Tasks labeled Workbench Self Service can be performed by certified Workbench Self Service users or by our support staff.

## User Type Rapidhire Settings – Workbench *Super User* and *Tech Services Users*

The users should have existing user type privilege **Talent Gateways: Posting - modify posting sites** configured.

New user type Rapidhire setting: **Post/Unpost to Talent Gateways (will repost to previously used Gateways OR defaults if first posting)**

**Workbench >Tools > Users >User types > Configure Rapidhire > Landing Page**

Button Name	Display	Default
Positions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
- Post/Unpost to Talent Gateway(s) (will repost to previously used gateways OR defaults if first posting)	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Check to allow users to view button to post/unpost to the default or previously posted BrassRing Talent Gateways.



## Reqs – Additional Time Zones for Removing Postings

When users specify the time to remove requisition postings, they now have more time zone options on the **Posting Options** screen. Based on the configuration of the requisition template, time zones other than the five US standard time zones are available.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> LDP 223	<input checked="" type="checkbox"/> BrassRing	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact our Support Team for implementation details.	

### Feature Description

BrassRing users post requisitions or make changes to already-posted reqs on the **Posting Options** screen. There they can select the date and time at which the req is to be removed from the selected BrassRing Talent Gateway. Previously, the selected time of removal was restricted to the five US standard time zones. This project provides a new setting so clients can select time zones based on the req template configuration.

When the setting is in use, users removing requisitions on BrassRing Talent Gateways see new time zones in addition to the existing five US time zones. These time zones are displayed in the standard GMT Offset format.

### BrassRing User Experience

This feature is available for BrassRing users with privileges to open and post requisitions to BrassRing Talent Gateways. Depending on the configuration, users see the additional time zones while selecting the date and time at which the requisition posting is to be removed from the BrassRing Talent Gateway on the Posting options screen.

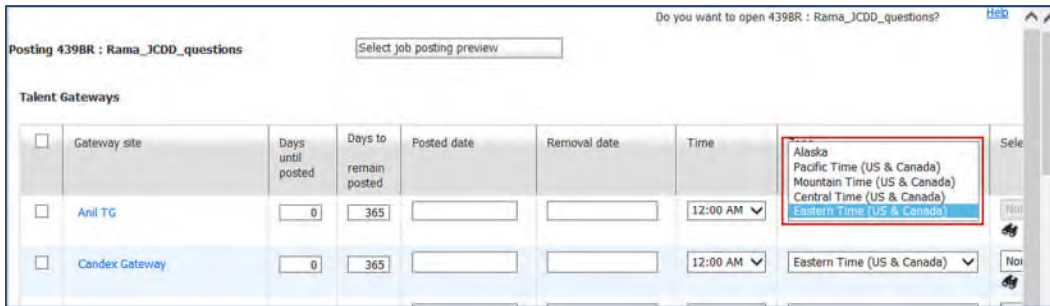
For example, the following screen shot presents all the US Standard time zones and in addition to those, the time zones **(GMT +05:30) Chennai, Kolkata, Mumbai, New Delhi, (GMT +05:30) Kuala Lumpur, Singapore** are displayed.

The screenshot shows the 'Posting 551BR : Information Developer Specialist' screen. It features a table of Talent Gateways with columns for Gateway site, Days until posted, Days to remain posted, Posted date, Removal date, Time, and a dropdown menu for Time. The dropdown menu is open for the 'Anil TG' gateway, showing a list of time zones: (GMT-09:00) Alaska, (GMT-08:00) Pacific Time (US & Canada), (GMT-07:00) Mountain Time (US & Canada), (GMT-06:00) Central Time (US & Canada), (GMT-05:00) Eastern Time (US & Canada), (GMT+05:30) Chennai, Kolkata, Mumbai, New Delhi, (GMT+08:00) Kuala Lumpur, Singapore, and (GMT-05:00) Eastern Time (US & Canada). The additional time zones are highlighted with a red circle.

### Limitations and Known Issues

The time and time zones apply only to posting removal time, not to posting time.

The GMT Offset format is displayed only if time zones in addition to the five US Standard time zones are configured. If there are no additional time zones configured for the selected requisition template, the five US standard time zones namely, Alaska, Pacific Time(US& Canada), Mountain Time(US& Canada), Central Time(US& Canada), and Easter Time (US& Canada) continue to display in the format currently in use.



## How Do Clients Get this Feature?

This feature is controlled by an existing client setting and requisition form configuration. Users with user type privileges to post requisitions on BrassRing Talent Gateways can access this feature.

Please contact our Support Team or your Certified Workbench User for more information.

# Configuration Tasks

This section describes the tasks required to configure this feature. Tasks labeled Workbench Self Service can be performed by certified Workbench Self Service users or by our support staff.

## Client Settings – Workbench (Support Staff)

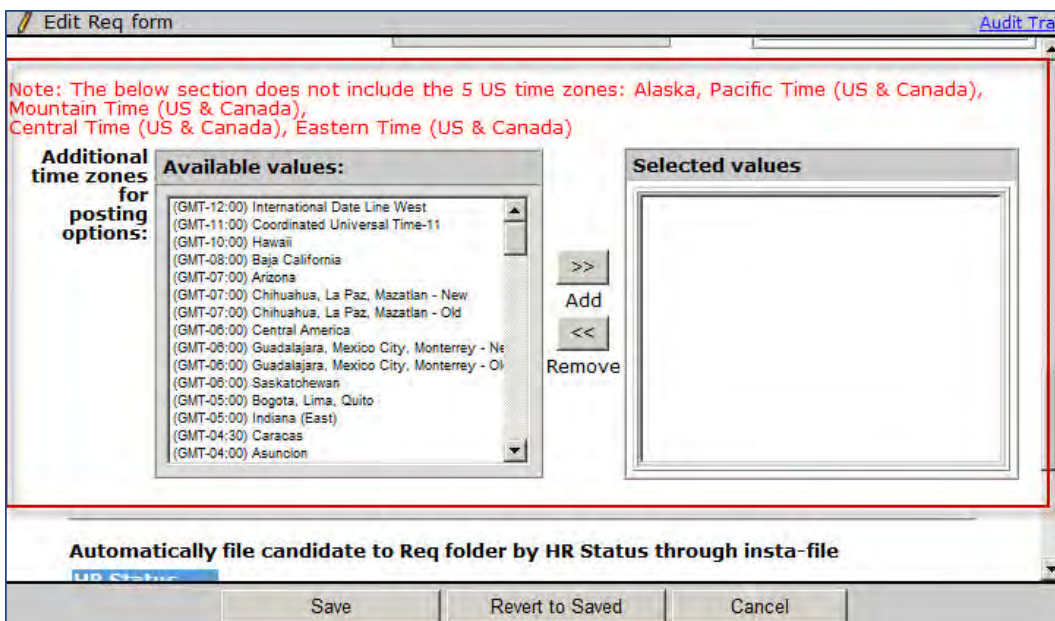
Existing client setting: **Job Posting Removal Time & Time Zone** should be set to **On** in order for the additional time zone settings to be enabled and available for configuration.

**Workbench > Select a client > Edit Client Settings**

## Req Form Field Attributes – Workbench Self-Service (Tiers 0+)

A new setting **Additional time zones for posting options** is available at the Req form/template level to configure the display of additional time zones on the req posting options page.

**Tools > Forms > Reqs > Req forms > Add/ Edit Form attributes** icon [for selected field]



You can configure any number of additional time zones for a req form by adding them to the “Selected values” section. You can add all of the available time zones to be displayed in the posting options page. The setting does not include the 5 US time zones: Alaska, Pacific Time (US & Canada), Mountain Time (US & Canada), Central Time (US & Canada) & Eastern Time (US & Canada). They are displayed in the GMT offset format by default when you select additional time zones. If none are selected, the US time zones continue to be displayed in the format currently in use.

When you remove an already-added time zone, the system validates whether that time zone is set for one or more requisitions. If the time zone is configured for any requisition, an error message displays a list of all such requisitions.

# Reqs – Controlling Editing of Site Options When Posted

Your organization can now set a new user type privilege to prevent users from editing posting site options and questions after a req is posted to a Talent Gateway.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> RDP 1058	<input checked="" type="checkbox"/> BrassRing <input checked="" type="checkbox"/> Talent Gateways	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Specific conditions required – see details below.	

## Feature Description

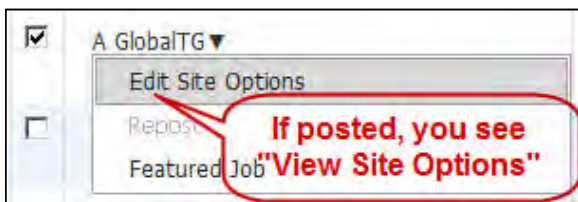
For clients using the new Posting Options and Site Options pages (requires that **Posting Options Page – New UI** client setting is enabled), this feature provides control of edits on the Site Options screen for reqs posted to a Talent Gateway. Those clients can now set a new user type privilege, **Questions – make “Edit site options” non-editable after posting**, that allows users only to view the Site Options screen for a req posted to a Talent Gateway, but not edit it.

Background: Previously, users could edit the questions selected for a req after it was already posted to a Talent Gateway. However, changing the questions or options on the Site Options screen could potentially create inaccuracies and inconsistencies in the requirements for the job. This feature prevents those problems by preventing changes after the req is posted.

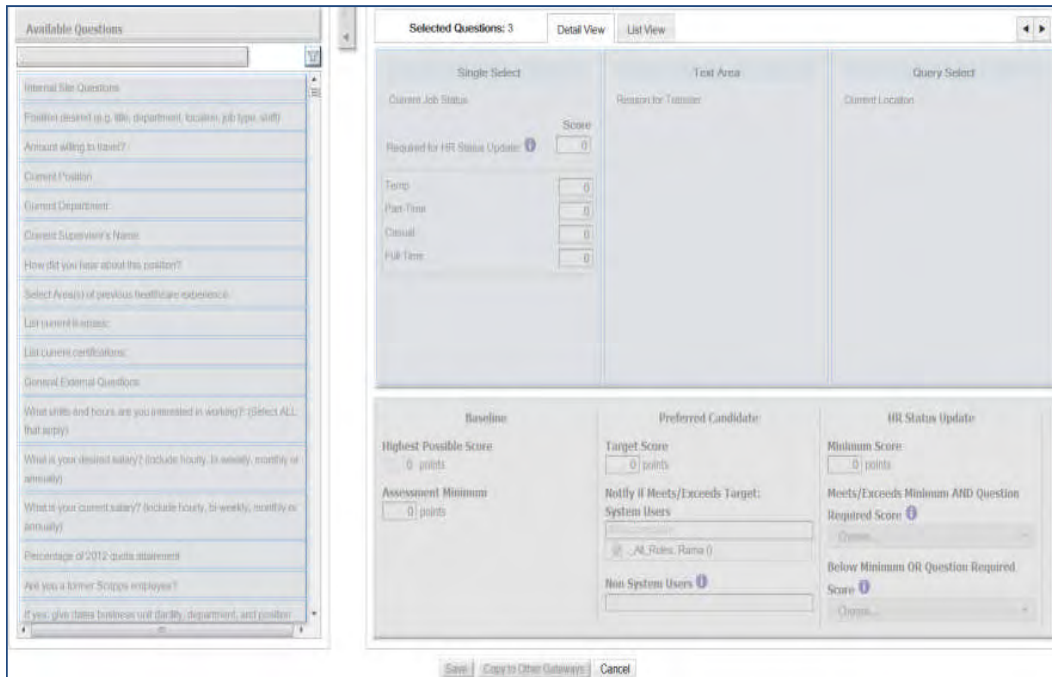
## BrassRing User Experience

The **Questions – make “Edit site options” non-editable after posting** user type privilege and the respective functionality are applicable to the **Site Options** page, accessed via Req-posting workflows from the Posting Options page.

For reqs already posted, the action in the pull-down control for the selected Talent Gateway on the Posting Options page depends on the **Questions – make “Edit site options” non-editable after posting** user type privilege. Users with the privilege set see View Site Options instead of Edit Site Options.

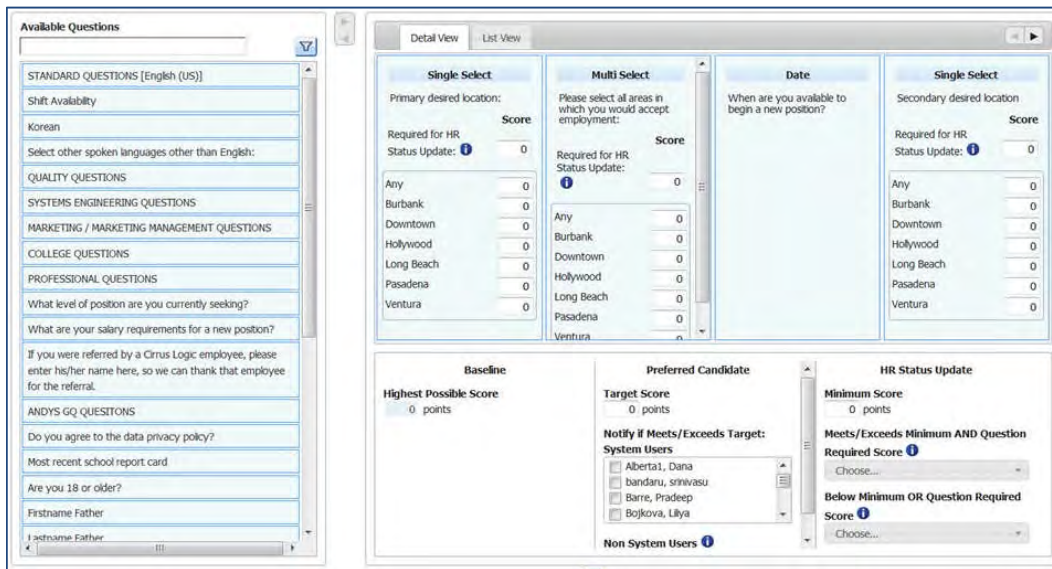


- **View Site Options** action – resulting Site Options page has non-editable content if privilege is set.



The page remains uneditable for this user type even if the req is set to post to the gateway in the future, or expires, or the posting is manually taken down. Users can only scroll in the selected questions and view the List view.

- **Edit Site Options** action – resulting Site Options page is editable if privilege is NOT set. Page is



## How Do Clients Get this Feature?

This feature is available only for clients using the new Posting Options and Site Options pages: the **Posting Options Page – New UI** client setting must be enabled. It is not applicable to the classic Questions page, nor, currently, to BrassRing Agency gateways. The feature is controlled by a new user type privilege. Please contact our Support Team or your Certified Workbench User for more information.



# Configuration Tasks

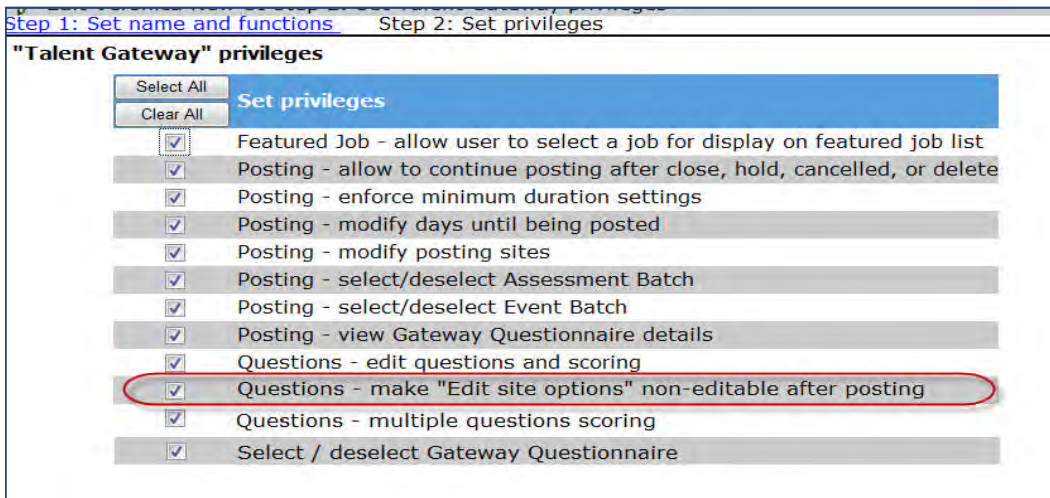
This new user type privilege functionality applies only for clients with the **Posting Options Page – New UI** client setting enabled.

## User Type Privileges – Workbench Self-Service (Tiers 1+)

New user type privilege: **Questions – make “Edit site options” non-editable after posting**

**Workbench > Tools > Users > User types > Edit type permissions [for selected type] > Talent Gateway**

Restricts users from editing a req’s Site Options page content after the req has been posted. Rather than the Edit Site Options action, users with this privilege set see the View Site Options action instead when the req is already posted.



Existing user type privileges that BrassRing users need for the Site Options page are:

**Workbench > Tools > Users > User types > Edit type permissions [for selected type] > Talent Gateways**

- Questions - edit questions and scoring
- Questions - multiple questions scoring

# Rules Automation Manager – Internal Publish Across Clients

This enhancement allows RAM Publish to function in a “client family” environment, as well as from a base library client, publishing from one client ID to another client ID within the same client family.

IBM® Kenexa® BrassRing® on Cloud Release 13.4		
<b>Feature Areas</b> RDP 1004	<input checked="" type="checkbox"/> Workbench Self-Service <input checked="" type="checkbox"/> Rules Automation Manager	
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Specific conditions required – see details below..	

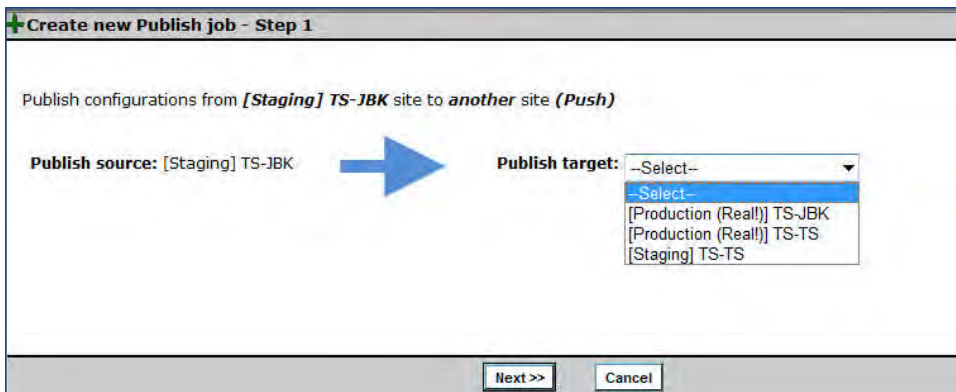
## Feature Description

**Background:** Publishing of RAM was previously possible only from a single client’s Staging environment to the Production environment of the same client. This was because of the encryption of user names and passwords present in the source environment.

However, this hindrance has been overcome when Workbench users publish from one client ID to another client ID within the same client family. A client family is a group of client environments bundled in BrassRing Workbench. This can be configured by IBM BrassRing staff from the “Manage Client Settings” option in Workbench.

## BrassRing Workbench User Experience

So long as the client IDs are within the same client family, users can select a target from a different environment than the source environment.



In those cases, the following warning message is **no** longer presented: “Note: RAM Triggers cannot be published across ClientIDs due to encryption of usernames and passwords. Counterpart environments of the same ClientID will only be listed as a Publish Target.”

**Best practice:** Run a difference report in Workbench before publishing any RAM triggers having User ID’s; This will help to mitigate the risk of existing user ID’s being overwritten in the target environment.



## How Do Clients Get this Feature?

This feature is available without any additional configuration. Some changes were made within Workbench to enable the functionality for users with specific user type privileges.

Please contact our Support Team for more information about this feature.

# Social Media – API Key Configuration

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Clients using Social Media to share jobs and attract candidates should create their own API keys on various Social Media websites and configure those keys in BrassRing Workbench for their use with the BrassRing application. This assists with performance during peak hours, especially with LinkedIn.

IBM® Kenexa® BrassRing® on Cloud Release 13.4.2		
<b>Feature Areas</b> RDP 1070	<input checked="" type="checkbox"/> BrassRing	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Specific conditions required – see details below.	

## Feature Description

Clients can now create individual API keys for Social Media websites. Prior to this release, a static API key was used for all social media sites, which at times resulted in errors during peak traffic hours. The creation of individual API Keys helps distribute the traffic, resulting in a smoother candidate experience.

## Best Practice Recommendations

Best practice is to create three different pairs of API Key and Secret Key combinations.

## How Do Clients Get this Feature?

Clients with the Enable Social Media integration client setting set, for one or more of the social networking sites, create individual API keys for desired sites. The keys must then be configured in Workbench. If your organization does not have a Workbench administrator, your IBM Representative can assist you.

# Configuration Tasks

Clients first create an API for the desired social media sites, following the steps in these separate documents, as appropriate (but always see the vendor site for the latest instructions):

- *How to create API for LinkedIn*
- *How to create API for Twitter*

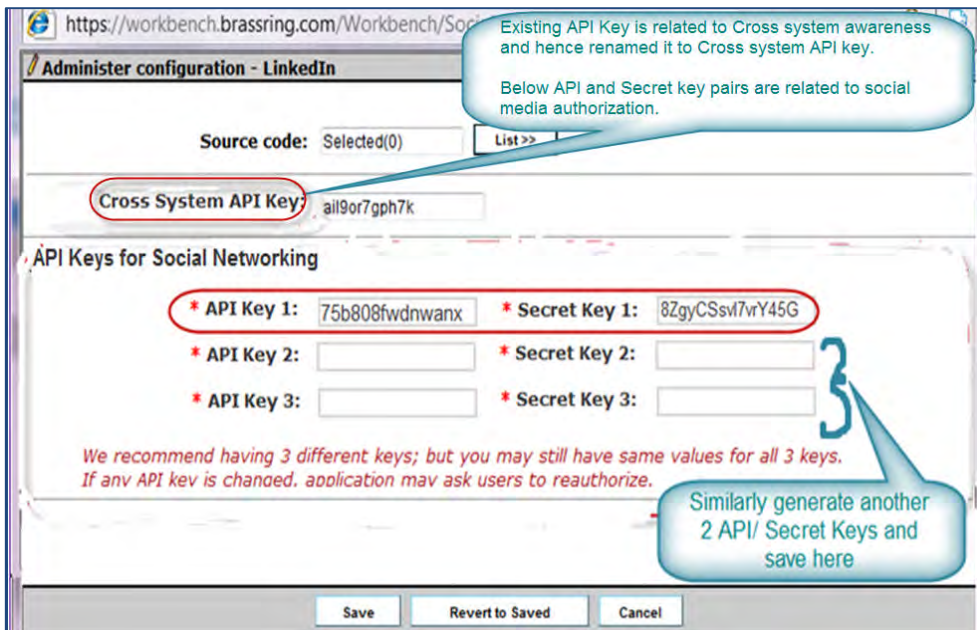
Keys obtained during API creation must then be configured in Workbench.

## Social Media Configuration – Workbench Self-Service (Tiers 7+)

For each social media site, three (3) API Key and Secret Key combinations can be obtained and added in Workbench. You can choose to use one API key and Secret Key pair for all three combinations, but it is best practice to create three different pairs. Configure the API keys in Workbench:

**Tools > Settings > Social Media Configuration > Administer configuration** [for selected social site]

LinkedIn Sample



Enter the keys in the section “API Keys for Social Networking.” If you are using more than one workflow of LinkedIn integration, it is HIGHLY RECOMMENDED that you create 3 separate APIs. The first API key is used for BrassRing workflows (posting to company or individual accounts from within BrassRing), the second API key is used for Talent Gateway workflows for logged in users and the third is used for Talent Gateway users who have not logged in.

(The Cross System API Key is reserved for the separate cross-system awareness feature. See the separate document “BrassRing LinkedIn Cross System Awareness” for specific steps to set up the API that is needed for that functionality.)

## Twitter Sample

The screenshot shows a web interface titled "Administer configuration - Twitter" with an "Audit Trail" link in the top right. Below the title, there is a "Source code:" label with a dropdown menu showing "Selected(0)" and a "List >>" button. The main section is titled "API Keys for Social Networking" and contains two columns of input fields. The first column has three fields labeled "API Key 1:", "API Key 2:", and "API Key 3:". The second column has three fields labeled "Secret Key 1:", "Secret Key 2:", and "Secret Key 3:". The first "API Key 1:" field contains the text "2TsjNJQG7TKMRUDj1lQHmQ" and is circled in red. The first "Secret Key 1:" field contains the text "FYxeeVfGpRS1nMbQkObipLLiyl" and is also circled in red. A blue callout box with an arrow pointing to the "Secret Key 3:" field contains the text "Similarly generate another 2 API/ Secret keys and save here". At the bottom of the form, there is a red warning message: "We recommend having 3 different keys; but you may still have same values for all 3 keys. If any API key is changed, application may ask users to reauthorize." Below the warning are three buttons: "Save", "Revert to Saved", and "Cancel".

After you configure the new keys from the social media sites within Workbench, all of your BrassRing users, as well as candidates, must once again authorize BrassRing. An advantage with this change is that candidates and users see your organization's brand instead of BrassRing's brand on the authorization screen.

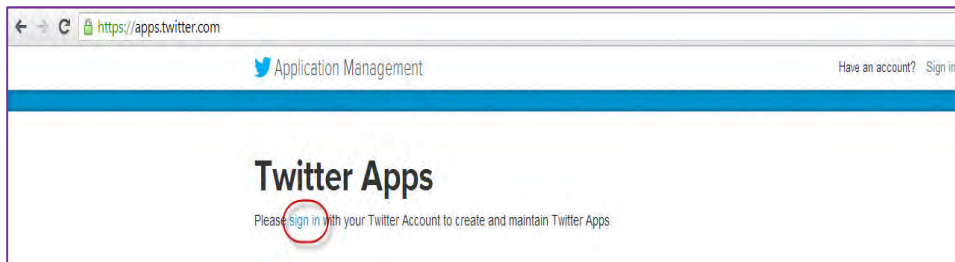
# Social Media - How to create API for Twitter

Clients using Social Media to share jobs and attract candidates should create their own API keys on Twitter and configure those keys in BrassRing Workbench for their use with the BrassRing application. This assists with performance during peak hours.

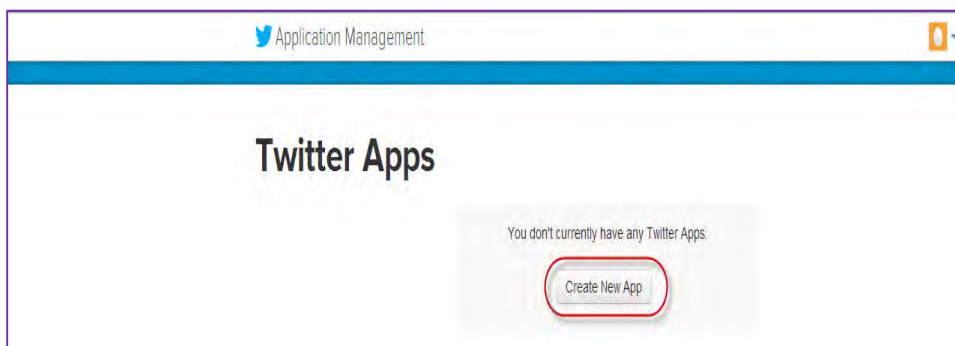
IBM® Kenexa® BrassRing® on Cloud Release 13.4.2		
Feature Areas <b>RDP 1070</b>	<input checked="" type="checkbox"/> BrassRing	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Specific conditions required – see details below.	

The following steps help you in creating an API for Twitter: (Twitter site appearance or instructions can change, so exact procedure could differ slightly.)

- 1) Open the following website for Twitter and click “Sign in”. Provide your twitter credentials.  
<https://apps.twitter.com/>



- 2) Click “Create New App”.



- 3) Fill the details in the application form

Application Management

## Create an application

**Application details**

**Name \*** **Enter your application name here**

Mycompany\_Career

Your application name. This is used to attribute the source of a tweet and in user-facing authorization screens. 32 characters max.

**Description \*** **Enter description of your application**

This application is used to access my company's career page.

Your application description, which will be shown in user-facing authorization screens. Between 10 and 200 characters max.

**Website \*** **Enter your company's website**

Your application's publicly accessible home page, where users can go to download, make use of, or find out more information about your application. This fully-qualified URL is used in the source attribution for tweets created by your application. (If you don't have a URL yet, just put a placeholder here but remember to change it later.)

**Callback URL \*** **Enter the appropriate URL**

Where should we return after successfully authenticating? OAuth 1.0a applications are not supported. To restrict your application from using callbacks, leave this field blank.

<https://sjobs.brassring.com/tgwebhost/>  
<https://sstagingjobs.brassring.com/tgwebhost/>  
<https://krb-sjobs.brassring.com/TGWebHost/>  
<https://stagingkrb-sjobs.brassring.com/TGWebHost/>  
<https://krbcn-sjobs.brassring.com/tgwebhost/>

Developer Rules of the Road

Last Update: July 2, 2013.

Twitter maintains an open platform that supports the millions of people around the world who are sharing and discovering what's happening now. We want to empower our ecosystem partners to build valuable businesses around the information flowing through Twitter. At the same time, we aim to strike a balance between encouraging interesting development and protecting both Twitter's and users' rights.

So, we've come up with a set of Developer Rules of the Road ("Rules") that describes the policies and philosophy around what type of innovation is permitted with the content and information shared on Twitter.

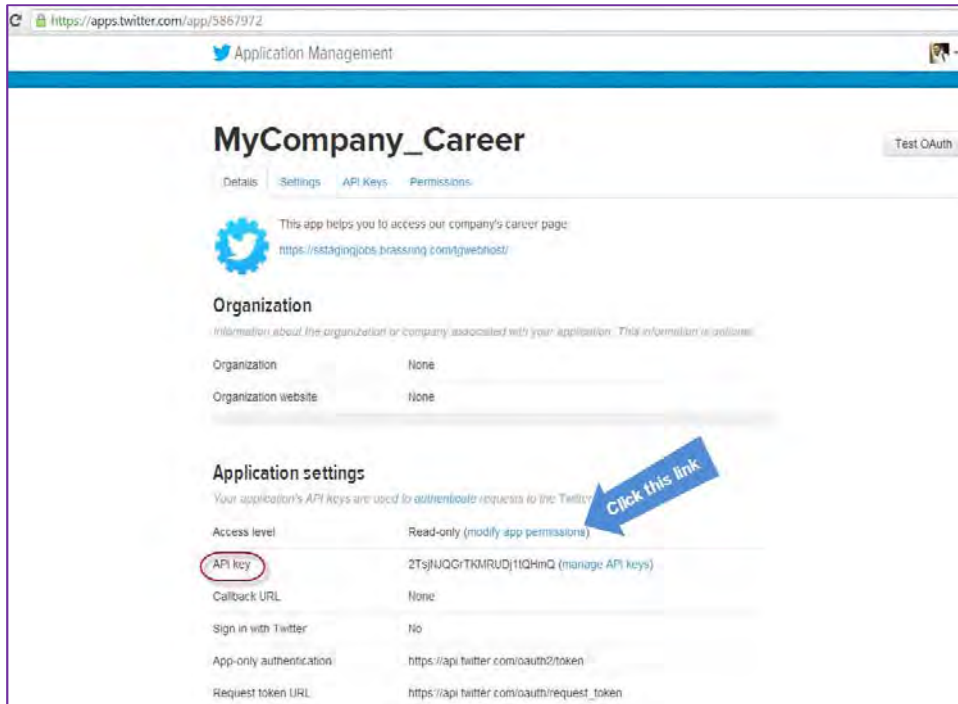
The Rules will evolve along with our ecosystem as developers continue to innovate and find new, creative ways to use the Twitter API, so please check back periodically to see the current version. Don't do anything prohibited by the Rules and talk to us if you think we should make a change or give you an exception.

If your application will eventually need more than 1 million user tokens, or you expect your [embedded Tweets](#) and [embedded timelines](#) to exceed 10 million daily impressions, you will need to talk to us directly about your access to the Twitter API as you may be subject to additional terms. Furthermore, applications that attempt to replicate Twitter's core user experience (as described in Section 1.5 below)

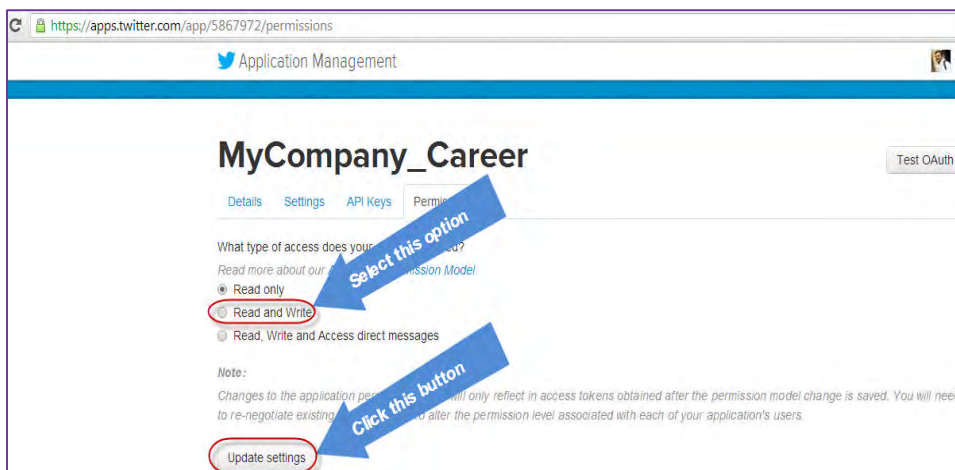
Yes, I agree **Click the checkbox**

Create your Twitter application **Click here**

- 4) Your app is successfully created and the API key is displayed as shown in the following image. Click "modify app permissions".

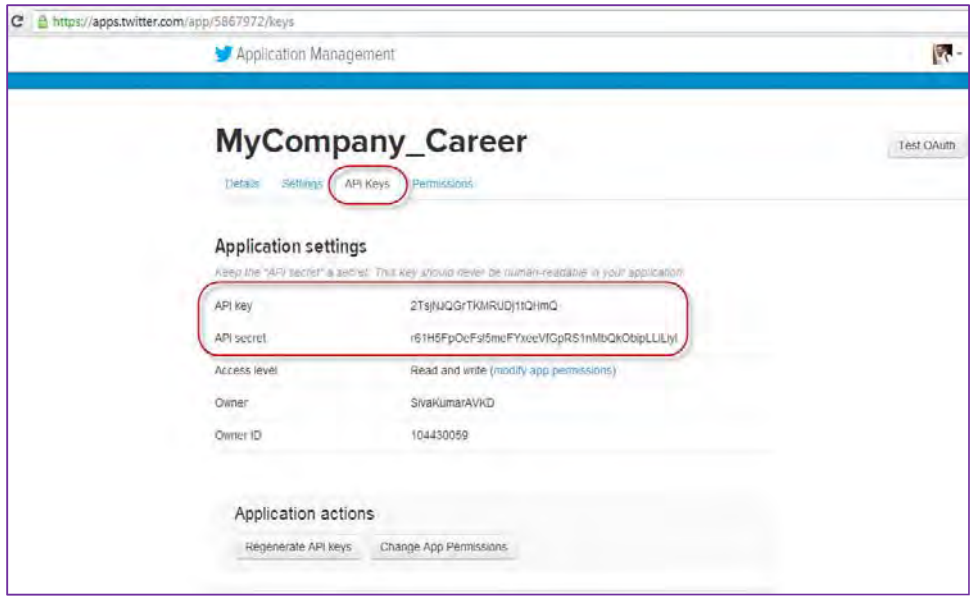


- 5) You will be routed to “Permissions” tab.  
Select the “Read and Write” option and click “Update Settings”.

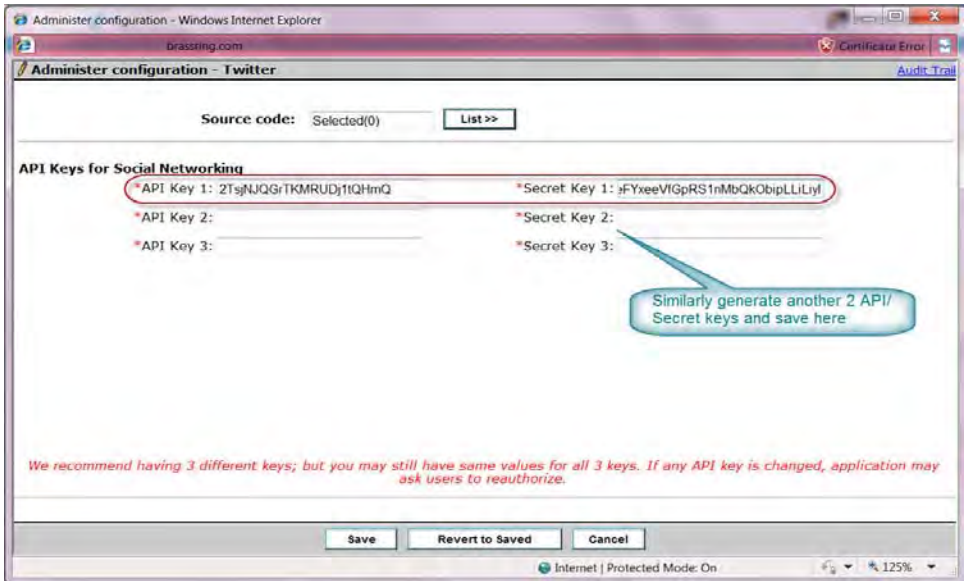


- 6) Click “API Keys” tab (please refer the previous image).  
The API key and Secret Key are displayed in the “Application Settings” section.

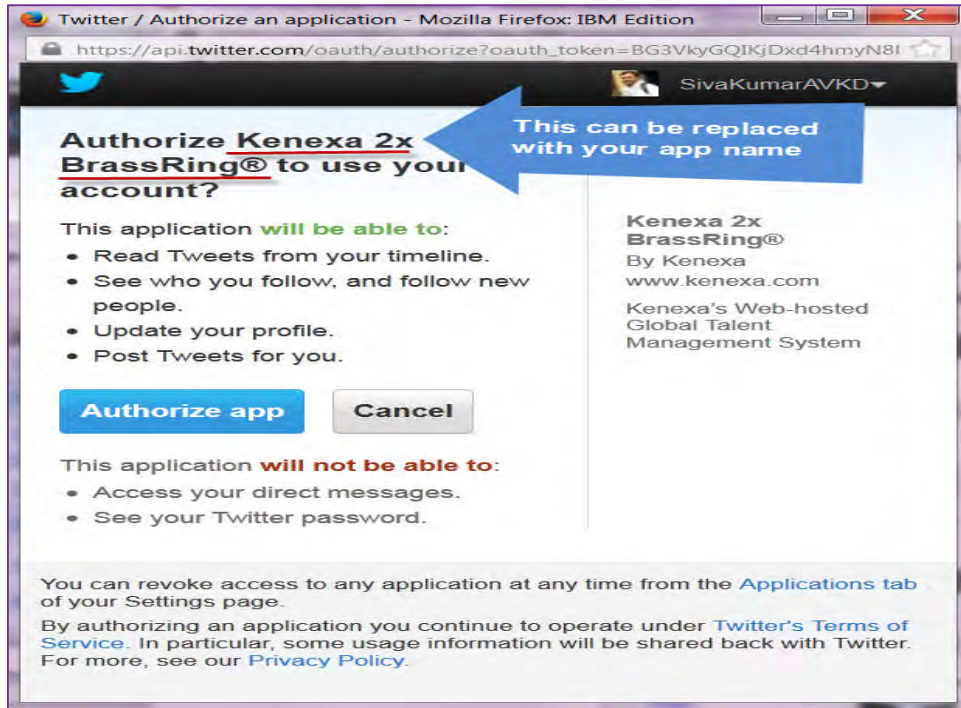




7) API Key and API secret, thus generated (as shown in # 6) must be provided in Workbench in the Twitter's Administer configuration page as follows:-



- 8) You may choose to use one API key and Secret Key pair for all three combinations, but it is a best practice to create three different pairs.
- 9) The advantage of creating your own Twitter app is that, candidates and users see client's brand instead of BrassRing's brand on the authorization screen.



# Social Media – Privacy Policy Enhancement

This project extends Talent Gateway privacy policy functionality to include social media account creation on Talent Gateways. Candidates using their Facebook, LinkedIn or Twitter credentials to log onto privacy policy enabled Talent Gateways must now accept a Privacy Policy before completing the login process.

IBM® Kenexa® BrassRing® on Cloud Release 14.0	
Feature Areas RDP 1089	<input checked="" type="checkbox"/> Talent Gateways
Visible Changes	<input checked="" type="checkbox"/> Yes
How do I get this feature?	<input checked="" type="checkbox"/> Some configuration required

## Feature Description

Candidates using their Facebook, LinkedIn or Twitter credentials to create new user accounts on privacy policy enabled Talent Gateways must now accept a Privacy Policy before completing the login process.

While creating a new account on a BrassRing Talent Gateway, candidates are presented with a privacy statement. This standard functionality is now extended to account creation using any of the social media websites including LinkedIn, Facebook and Twitter etc.

- The OAuth credentials of the candidate are checked during the sign in process.
- If the OAuth credentials exist, it means the candidate is already registered on the BrassRing Talent Gateway and therefore is redirected to the landing page.
- If the OAuth credentials do not exist, the login screen appears, and then the app permission page for the social media site is displayed followed by the Privacy Statement pop-up.
- If the user is already logged in to one of their social media accounts in the browser, the login username/password page is skipped and the App permissions page of the particular social media account is directly displayed.

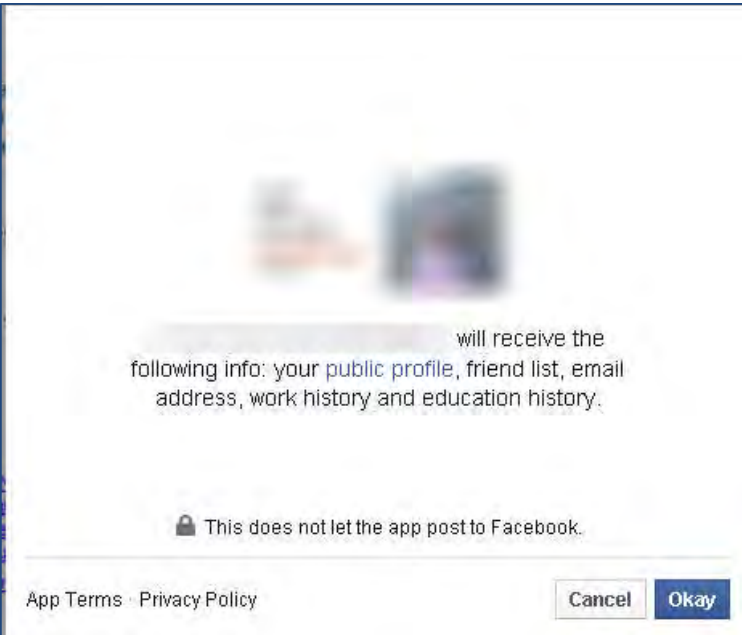
## Candidate User Experience

Candidate begins account creation process on a Talent Gateway enabled for privacy policy:

1. Selects a social media icon to Login.  
The social media login page launches.



2. Selects Log In.  
The Facebook Login dialog box launches.



Candidate can select the Privacy Policy to view and read the Privacy Policy. Alternatively, candidate can select App Terms to view and read App Terms.

3. Selects Okay (or appropriate permission button).  
Candidate lands on Talent Gateway Profile page.

### Limitations and Known Issues

This functionality is not available for candidates using the Employee Referral.

### How Do Clients Get this Feature?

For Talent Gateways enabled for privacy policy, no additional configuration is required. The feature is controlled by the existing Talent Gateways settings for Privacy Policy.

# Configuration Tasks

If a Talent Gateway is not enabled for privacy policy, use this section to configure the Talent Gateway. Tasks labeled Workbench Self Service can be performed by certified Workbench Self Service users or by our support staff.

## Talent Gateway Text Customization – Workbench Self-Service (Tiers 1+)

1. Workbench > Tools > Talent Gateways > Text customization.
2. Navigate to Text Customization > Privacy Policy Tab.
3. Complete Text Customization sections as necessary.

The screenshot shows the 'Privacy policy' configuration page. At the top, there is a navigation bar with tabs: Restricted access, Saved drafts, Additional information, Notifications, Event Manager, Candidate portal, WOTC, Communications history, Privacy policy (selected), Inactivity time-out, and Web tracker. The main content area is titled 'Privacy policy' and contains several sections:

- Privacy policy:** A radio button is selected for 'Enter text here'. Below it is a text area containing 'Testing purpose it is essential.' and a 'Show me' link.
- URL of existing statement:** An unselected radio button is next to this label, with an empty text field below it.
- Privacy policy text header:** A text field contains 'Privacy policy' and a 'Show me' link. A 'Reset to default' button is below the field.
- Non-consent alternative text:** An empty text field with a 'Show me' link below it.
- Non-consent text header:** A text field contains 'Non-consent policy' and a 'Show me' link. A 'Reset to default' button is below the field.
- Privacy policy placement:** Three radio buttons are present: 'As hyperlink at bottom of "apply options" page' (unselected), 'As popup window on "create a profile" page' (selected), and 'As popup window after question on "create a profile" page' (unselected).
- Privacy question text:** An empty text area with a 'Show me' link below it.
- Policy answer 1: (Bypass policy):** An empty text field with a 'Show me' link below it.
- Policy answer 2: (Display policy):** An empty text field with a 'Show me' link below it.
- Disclaimer text:** An empty text field with a 'Reset to default' button below it.

At the bottom of the form, there are four buttons: 'Save', 'Reset to Saved', 'Cancel', and an empty button.

4. Select Save.

# Social Referrals

This feature introduces social referral functionality for IBM® Kenexa® BrassRing® on Cloud. Social referral functionality enables employees to use their social media to refer candidates (jobless and job-specific) via a new social referral widget, and to track their candidate referral activity. Recruiters can also track candidate referrals within requisition folders and on candidates' Talent Records. Clients can configure social referral workflows to meet their workflow requirements including the use of Rules Automation Manager (RAM).

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
Feature Areas LDP 188	BrassRing Talent Gateways	Workbench Self-Service
<b>Visible Changes</b>	No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	Configuration required – contact our Support Team for implementation details.	

## Feature Description

This feature introduces new social referral functionality for employees and recruiters. When this feature is configured, employees can easily refer colleagues via their social media accounts, including adding customized email messages. Once a social referral is made, employees can receive notification of a candidate's progress throughout the application process. Clients can also configure a workflow that allows them to elicit additional information about referral candidates before referrals are sent. Recruiters can view referral candidate information from within a requisition or on a candidate's Talent Record.

### Using social referral employees can:

- Submit jobless (Submit General Referral) and job-specific referrals from their internal Talent Gateway profile account or from an existing Employee Referral Gateway to their Facebook, LinkedIn, or Twitter accounts.
- Choose to submit these referrals to their individual social media accounts or to all three social media account simultaneously.
- Track their social referral history of referrals sent on their job search results, job details, or Talent Gateway (TG) profile pages.
- Confirm when referrals are posted, when referred candidates complete job submissions, and when referral status changes throughout the hiring process.

### Using social referral recruiters can:

- Access employee referral historical information (existing legacy and social referral) via candidate forms on the Candidate Results panel within a requisition or on a referred candidate's Talent Record ribbon.
- Actively participate in the referral process by asking referral employees customized questions about potential referral candidates before communication is sent (social media postings or emails) and after submission.
- Access source code data to identify candidate referral sources.
- View or edit detailed candidate information via candidate forms.

### Using Social referral clients can:

- Customize the candidate referral process including defining referral candidate types, using email templates for email reminder messages, and setting referral expiration time limits.
- Use Rules Automation Manager (RAM) to configure an automated social referral workflow to meet their communication, ownership rules and other referral process requirements.



- Configure candidate forms to capture candidate data relevant to their business needs.
- Customize employee referral candidate forms to capture information about referred candidates.
- Define and configure candidate referral "ownership" rules, such as whether referring employees own candidate referrals on a per req or per candidate level (designated time period with expiration limits).
- Decide which Talent Gateways the social referral widget (button) should be placed (Internal career site or dedicated Employee Referral site).
- Use Gateway Questionnaires in the social referral process when the candidate applies.

Target users are BrassRing internal employees and BrassRing recruiters.

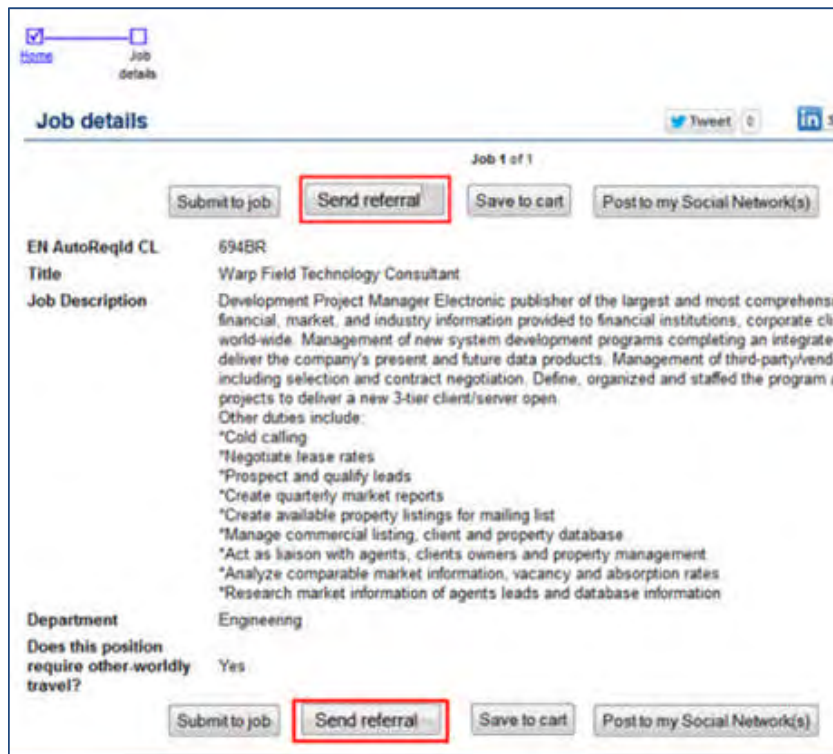
## Referring Employee's Experience

Employees can send job or jobless (company) referrals to their colleagues via Facebook, LinkedIn, or Twitter. The following workflows demonstrate a candidate referring a colleague to their social network from the [Job Search](#) Details page and their [Talent Gateway](#) profile page. Alternatively, employees can also select the Send Referral on the Job Search Results page or the Referral tab on their Edit Profile page.

### Send Referral from the Job Search page

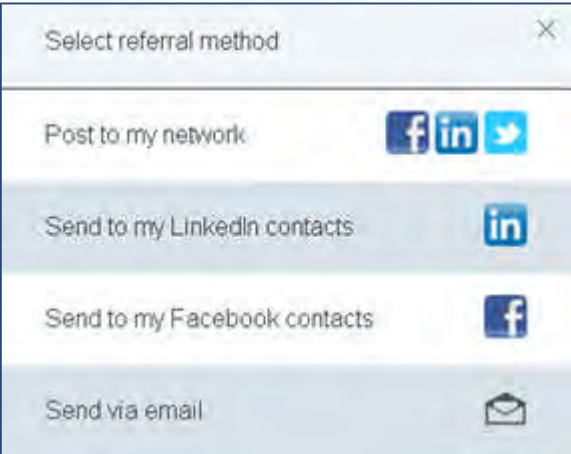
Employee logs into their TG profile page and launches a job search.

1. Selects a job.  
Jobs Details Page launches:



2. Selects **Send Referral**.  
The Select referral method dialog box launches:





3. Employee can [post to their social network](#), individual social media accounts, social media contacts, or [send a referral via email](#).

### Send jobless Referral via Talent Gateway Profile page

Employee logs into their Talent Gateway profile.

1. Lands on their Talent Gateway Profile page.
2. Selects **Submit General Referral**.

The Select referral method dialog box launches:



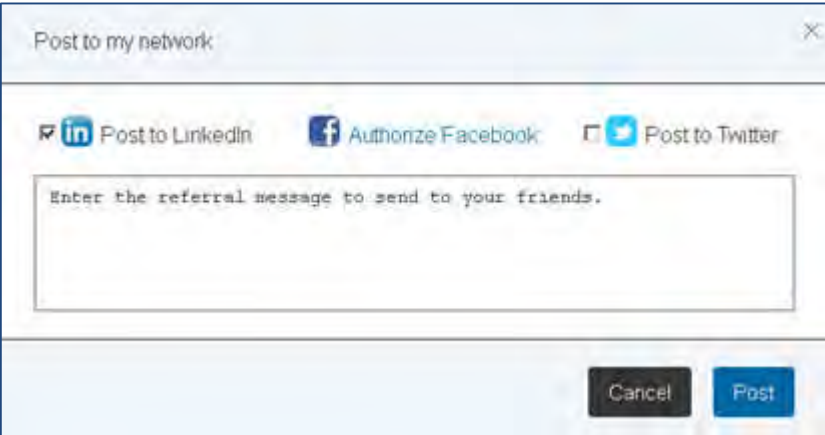
Employee can [post to their social network](#), individual social media accounts, social media contacts, or [send a referral via email](#).

### Post to my network

3. Selects **Post to my network**.


The Post to my Network dialog box launches with authorized and non-authorized social networks.

Employee can authorize or remove social media authorization from the Post to my network dialog box or they can grant access via social networking information on their edit profile page.



4. Selects the checkbox next to each social network to authorize posting to those social networks or unchecks the checkbox next to a social network to unauthorize a social media site.

If an employee needs to initially authorize a social media site, they can do so by selecting that particular social media. Once the authorization process is complete, the Post to my network dialog box redisplay with a checkbox next to the newly authorized social media network.

 Employees can also access their Social Networking Information settings via their Profile page to grant or remove social media authorizations.


5. Enters referral message to colleagues.
6. Selects **Post**.  
Confirmation dialog box launches.
7. Selects **OK**.  
Referral link is posted to the designated social media sites.

#### Send Job Referral via Job Search Page via Send Email

3. Selects **Send via Email**.  
The Send via Email dialog box launches.
4. Employee completes the To, Subject, and Text box fields (type or copy and paste) and selects Send. Subject Field character count limit is 255 characters and text field character count limit is 1000 characters. Employee can send email to singular or multiple candidates.

Referral message is sent.

5. Referral candidate receives referral email and is invited to submit their application via live link within the referral email.

 If Gateway Questionnaires are configured for the job apply process, candidates are directed to complete the GQ.

6. Receives notice if referral candidate submits a resume or submits to a job.

If configured, referral employees AND candidates receive reminder emails according to what is configured for that referral workflow. If the email was sent to multiple referral candidates, only candidates who have not applied receive reminder emails.

### Employee View of Referral History

From an employee logged in landing page, employees can select the My Referral Status to view their referral information. Employee logs into their profile page and:

1. Selects **My Referral Status**.

The Referral Status dialog box launches displaying detailed information for Referral Activity and Referrals sent.

Referral name	app-employee-id	job title	ref-actor	ref-actor-date	referral-submitted	referral-confirmed	referral-status
referral_test	711BR	Alien Translator			07-Oct-2014		Post to network : Facebook Declined
Meyers, Mike	711BR	Rocket Scientist	Review	01-Oct-2014	01-Oct-2014		Post to network : Facebook Approved
Day, Susan	730BR	Security Team			05-Sep-2014		Post to network : Facebook Declined


Referral-submitted	Referral method	app-employee-id	job title	Referral status
07-Oct-2014	Post to network : LinkedIn	711BR	Alien Translator	Pending Candidate Response
07-Oct-2014	Send via email	711BR	Alien Translator	Pending Candidate Response
07-Oct-2014	Send to contacts : Facebook	711BR	Alien Translator	Pending Candidate Response
07-Oct-2014	Send to contacts : Facebook	711BR	Alien Translator	Pending Candidate Response

The Referral Activity section populates when a referral candidate applies to the referred position. The Referral Activity section displays the following information:

- Referral name
- Job Requisition ID (blank for jobless referrals)
- Job Title
- HR Status
- HR Status Date
- Referral Submitted
- Referral Method  
Possible values: Post to Network: LinkedIn, Facebook, or Twitter; Send to Contact: LinkedIn or Facebook; Send via Email; or Copy Referral Link)
- Referral Status

The Referral Sent section populates when an employee sends a referral to a potential candidate. The Referral Sent section displays the following information:

- Referral Submitted Date
- Referral Submitted Method
- Auto Req ID
- Custom Job Title

 Send to Facebook contacts displays as referrals sent as soon as the user selects the option. If the user closes out of the Facebook message window, the system does not recognize this, so it displays as sent event though the Send to Contact process was not completed.

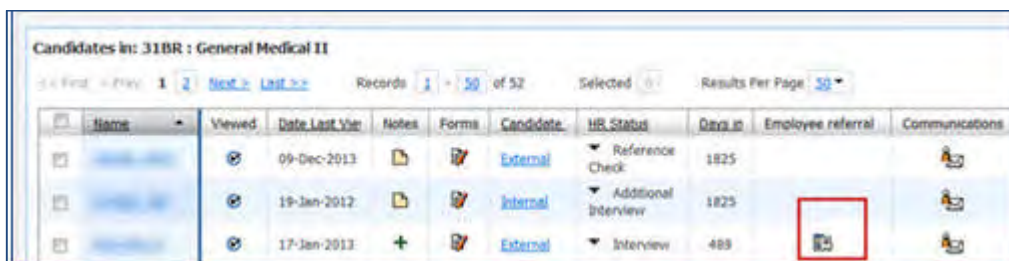
## BrassRing User Experience

BrassRing Users can access social media and legacy referral information from within a [requisition folder](#) or on a candidate's [Talent Record](#) ribbon. Legacy referral icon is honored by social referral as follows: For Per Candidate: If one form has "Owns Referral" set to "Yes" and For Per Req: If Employee Owns=Yes for the form tied to that Req.

### Social Referral – Requisition Folder

BrassRing User logs into BrassRing and selects the Candidate Results Panel:

1. Selects an active requisition.



Name	Viewed	Date Last Vis	Notes	Forms	Candidate	HR Status	Days in	Employee referral	Communications
		09-Dec-2013			External	Reference Check	1825		
		19-Jan-2012			Internal	Additional Interview	1825		
		17-Jan-2013			External	Interview	489		

2. Selects the referral icon in the Employee referral column.  
This icon displays for both Social Referral and legacy referrals.

Employee Referral History Page launches. If candidate has both Employee Referral history and social referral history, the Employee Referral page launches with two tabs, one for each referral type.

**Employee Referral Form History**

Referral form	Employee Submittal time	Employee name	Employee ID	Owms Referral	Req ID	Referral status
<a href="#">Employee Referral 5454</a>	20-May-2013 7:34:67	Ravi V	F49003	Yes	306R	Initial status
<a href="#">Employee Referral 6428</a>	13-May-2013 5:25:12	John C	904933	Yes	1006R	Applied

[Close](#)

3. Selects a Referral form link to view detailed information.

The Social Referral History Form launches:

Employee Referral History - Mozilla Firefox 28.0 Edition

Only displays if candidate has both ERG history and Social Referral → [Legacy Referral History](#)

Social Referral Form History

Referral Form	Submittal Date and Time	Employee Name	Employee ID	Owms Referral	ReqID	Referral Status	Primary Source	Secondary Source
<a href="#">Employee Referral</a>	20-Sep-2014 15:26:59	Firstname: Lastname:		Yes		Approved	Monster	

If an employee has both legacy and social referrals, a link to **Legacy Referral History** displays. The Legacy Employee Referral Form History displays the following information.

- Employee Submittal Date - Employee Submittal Time
- Employee First and Last Name
- Employee ID
- Referral Owner
- Req ID
- Referral Status
- Primary Source
- Secondary Source

These columns represent the standard Employee Referral form and are NOT configurable.

4. Selects the Employee referral link in the Social Referral Form History.

The Employee Referral form launches in View mode with available Print Option. Highlighted fields auto populate when a candidate applies. Other fields shown on this history can be set to update by Rules Automation Manager (RAM) or manually.

**Employee First Name** Firstname

**Employee Last Name** Lastname

**Employee ID**

**Employee BRUID** 140592982

**Employee Email**

**Employee Submittal Time** 15:26:59

**Employee Submittal Date** 30-Sep-2014

**Employee Ownership Expiration Date**

**Candidate First Name** Sally

**Candidate Last Name** Referral

**Candidate Email**

**Candidate Resumekey** 3978037

**Req ID** 121BR

**Candidate Application Time** 14:34:08

**Candidate Application Date** 01-Oct-2014

**Owns Referral** Yes

**Referral Status** Approved

**Referral Status Candidate Mask**

**Referral Status Employee Mask** Approved

**Referral Tier**

**Primary Source** Monster - Monster

**Secondary Source**

The Referral form fields are as follows:

- Employee First Name
- Employee Last Name
- Employee ID
- Employee BRUID
- Employee email
- Employee Submittal Time
- Employee Date
- Employee Ownership Expiration Date
- Candidate First Name
- Candidate Last Name
- Candidate Email
- Candidate Resume Key
- Req ID
- Candidate Application Time
- Candidate Application Date
- Owns Referral
- Referral Status
- Referral Status Candidate Mask

- Referral Status Employee Mask
- Referral Tier
- Primary Source
- Secondary Source

## Social Referral – Talent Record

BrassRing users can also view social referral information via a candidate's Talent Record Ribbon. (BrassRing user must have Candidates > View form privilege to view Employee Referral Forms.)

1. BrassRing user logs into a candidate's Talent Record.



The Employee Referral section of the ribbon displays these referral fields:

- Employee Referral status  
Field supports legacy and social referrals.  
If referral is configured as Per Candidate, this field displays status from the form where Owns Referral is set to Yes. Selecting this link opens specific form in view mode. If there is more than one form, the most recent forms launches.  
If referral is configured as Per Req, this field pulls the referral status from the form where the field "Owns Referral" is "Yes" for the req that the Talent Record was launched from. If not launched from req, then it pulls the most recent form instance where ownership is Yes across all reqs.
- Employee referral status date  
Field supports legacy referral history but not Social Referral
- Employee referral history  
New field representing social Referral history  
This field indicates the number of referral forms. If there are more than one referral, selecting this link launches the referral history in a grid. The fields in this grid are as follows:  
Employee Submittal Date - Employee Submittal Time  
Employee Name  
Employee ID  
Owns Referral  
Req ID  
Referral Status  
Primary Source  
Secondary Source



Selecting the referral link launches the corresponding referral form.

Referral form	Employee referral time	Employee name	Employee ID	Owns Referral	Req ID	Referral status
<a href="#">Employee Referral 1454</a>	29-May-2013 7:34:67	Ravi V	749003	Yes	306R	Initial status
<a href="#">Employee Referral 1438</a>	13-May-2013 5:35:12	John C	984933	Yes	1006R	Applied

Close

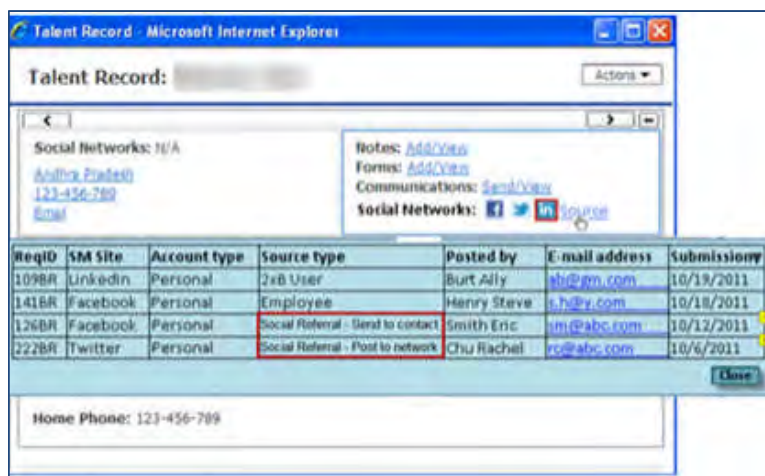
- Referral type.  
Field supports legacy and social referrals. It displays "Employee" if the criterion in the first paragraph is met (you can insert the actual text). If no Employee Referrals exists, this field displays N/A.
2. Selects Employee Referral status link.

Employee Referral Form launches in View or Edit Mode (depending on user privilege):

The Employee Referral form fields are as follows:

- Employee First Name
- Employee Last Name
- Employee ID
- Employee BRUID
- Employee email
- Employee Submittal Time

- Employee Date
  - Employee Ownership Expiration Date
  - Candidate First Name
  - Candidate Last Name
  - Candidate Email
  - Candidate Resume Key
  - Req ID
  - Candidate Application Time
  - Candidate Application Date
  - Owns Referral
  - Referral Status
  - Referral Status Candidate Mask
3. Selects **Save**, Clear, or Close on the Employee Referral Form.
  4. Selects **Social Networks** on the Talent Record Ribbon and selects the Source hyperlink. Social referral source type indicates whether referral was sent via Send to Contact or Post to Network.



## Best Practice Recommendations

When configuring the referral (candidate) form for this feature, it is recommended to use as many fields as necessary to provide the most functionality. Referral form fields can be added, hidden, and set to not required, but cannot be removed. When an employee refers for the first time, he/she is prompted to complete any required fields. It is recommended that referral specific questions (such as how they know the candidate or specific questions about the candidate) should not be required and instead be sent out when the candidate applies as part of the confirmation message to the employee.

## Limitations and Known Issues

Social Referral is available only for WCAG compliant (.net) Talent Gateways. Talent Gateways must be enabled for WCAG before enabling the Social Referral client setting.

Social Referral is not supported on IE8 in compatibility mode, only IE8 native mode.

## How Do Clients Get this Feature?

This feature is available via a client setting and additional configurations. Please contact our Support Team for more information about enabling this feature.

# Configuration Tasks

This section describes the tasks required to configure new 'Social Referral' functionality. Tasks labeled Workbench Self Service can be performed by certified Workbench Self Service users or by our support staff.

Social media authorization configuration procedures are vendor dependent. Please note that vendor site appearance or instructions can change and may differ from procedural instructions shown in this document.

To configure this feature, enable the following settings:

- [Client Setting – Social Referral](#)
- [Social media configuration](#)
- [“Administer Configuration” for Facebook / LinkedIn/ Twitter](#)
- [“Administer Configuration” for Send via Email/ Copy Referral Link](#)
- [Candidate referral form](#)
- [For Talent Gateways](#)
- [TG Settings and GQ](#)
  - [Enable social referral](#)
  - [Social referral configurations](#)
- [GQ – Employee Referral attribute](#)
- [Rules Automation Manager – Workbench Self-Service \(Tiers 7+\)](#)

## Client Settings – Workbench (Support Staff)

New client setting: **Social Referral**

Social Referral is available for WCAG compliant (.net) Talent Gateways. Talent Gateways must be enabled for WCAG before enabling the Social Referral client setting.



It is recommended that clients create and use their own API keys (as previously communicated in other social media integration functionality) for LinkedIn.

### 1. Workbench > Select a client > Edit


–OR–

Workbench > Admin > Manage Clients > Edit client settings [for selected client]

The screenshot shows the 'Edit client settings' dialog box. The 'Social Referral' setting is highlighted with a red box, showing options: None, Per Candidate, and Per Req. Other settings include Session type (Free-form), ReportingDataSource (0), ResumeTracking (No), RootDir (/jetstream/500), SecuredEmailID (Enterprise@trm.brassing), TGfull (No), SmartApproval URL (No), SSO Validation Request Time Interval (5 min), Suppress enhanced posting options (No), Talent Gateway login type (E-mail address only), and Talent Gateway password (Default). Buttons for Save, Revert to saved, and Cancel are visible at the bottom.

The new Social Referral setting enables a set of new configuration options in Workbench and disables some of the legacy ones. This setting drives what type of main ownership setting is used by the client

- By default “None” is selected. If either of the other two radio buttons are selected and saved, then:
- A standard custom candidate form is created automatically. This form is used for all ownership and reporting of referral data.
- “Per Candidate” selection create the form with form type of multiple per candidate. Candidates who are designated as a referral retain this designation for all reqs the candidate is filled to. Optional settings to submit a general referral without designating a req is allowed.
- “Per Req” selection creates the form with form type of multi per candidate per req. Candidates who are designated as a referral only retain this designation for the req which they were submitted for. Submitting a general referral not associated with a req is not allowed.
- To configure social referral settings on all existing and newly created TGs, causes these settings to change:
  - TG setting buttons “Enable Social Referral” and “Social Referral Configuration Options” display.
  - New Text Customization settings and the new GQ attribute display .

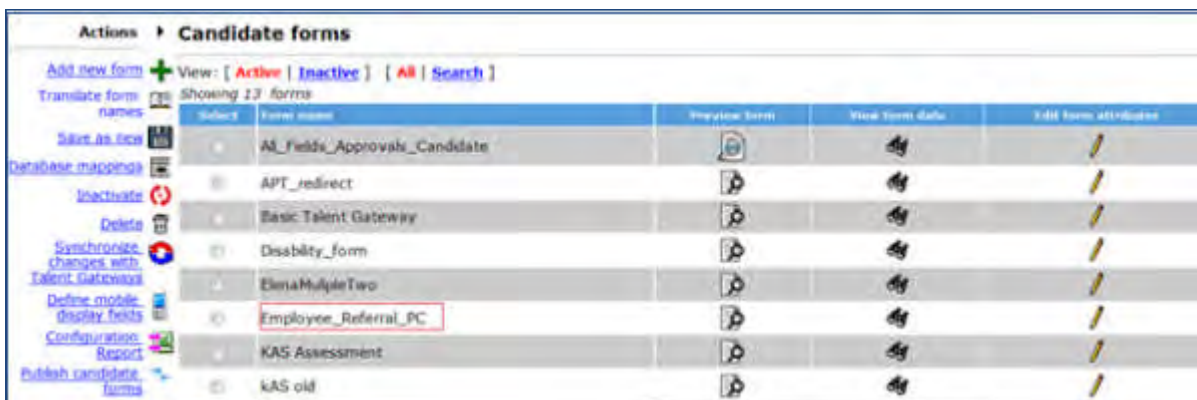
 Once this setting is saved, clients cannot edit this upon returning. Edits must be requested through the Workbench maintenance process

- .Net TGs are required for Social Referral. All TGs MUST be switched before turning on the client setting for Social Referral. That means that the Client setting: "Launch TG.Net Application" should be set to "Yes."
- The following client settings continue to be enabled; however, if all legacy Employee Referral gateways are removed/updated, then Social referral ignores these settings:
  - Referral eLink expiration clicks
  - Referral eLink expiration time
  - Referral rights expiration
- Legacy settings for Referral Status Descriptions and HR Status settings for Set withdraw/action date status remain active if previously used for Employee Referral since it is possible to use both Social Referral and Employee Referral functionalities. However, these settings do NOT apply to Social Referral.

## Candidate Referral Form (Tiers 1-7)

When the new client setting “Social Referral” is set to either “Per Candidate” or “Per Req”, a standard custom candidate form is created automatically. This form is used for all ownership and reporting of referral data. This form once created, cannot be inactivated or deleted as it is used for Social Referral functionality.

**Navigation/File path:** Tools > Forms > Candidate Forms



Form name	Employee form	View form date	Edit form attributes
All_Fields_Approvals_Candidate			
APT_redirect			
Basic Talent Gateway			
Disability_form			
ElnaMultipleTwo			
Employee_Referral_PC			
KAS Assessment			
kAS old			



If client uses more than one language, the form is created for the client's base language ONLY and the client must enter translations for the other languages for which Social Referral and Redirect Gateway are set. If this is not accurate, then BrassRing users may not be able to see the Referral Data that is submitted.

- Most Form attributes CANNOT be edited
- Title and Disclaimer CAN be edited
- Form Privileges CAN and SHOULD be edited upon setup (Defaults to none selected)
- If client would like users to search by fields on this form:
  - Add appropriate User types to:
    - Search
    - Output

**Edit form attributes**  
**Event Manager Candidate Facing Registration Form?** Yes No  
 Create candidate signature field (for use in Gateway Questionnaires only)   
**Add / View / Modify My** Recruiter System Admin HR Coordinator Hiring Manager QuickStart User  
**View - my reqs** Recruiter System Admin HR Coordinator Hiring Manager QuickStart User  
**View all** Recruiter System Admin HR Coordinator Hiring Manager QuickStart User  
**Modify - my reqs** Recruiter System Admin HR Coordinator Hiring Manager QuickStart User  
**Modify all** Recruiter System Admin HR Coordinator Hiring Manager QuickStart User  
**Save as draft** Recruiter System Admin HR Coordinator Hiring Manager QuickStart User  
**Save / modify / delete my** Recruiter System Admin HR Coordinator Hiring Manager QuickStart User  
**Delete all** Recruiter System Admin HR Coordinator Hiring Manager QuickStart User  
 Save Revert to saved Cancel

- Form Privileges CAN and SHOULD be edited upon setup (Defaults to none selected)
- [Required] Update View and Modify settings as appropriate
- View My/All: (depending on form type) for all users who need to view the Referral details (form, ribbon fields)
- Modify My/All: All users who need to manually update the form.

### Form Fields

- Fields CAN be added to this form, however, field attribute restrictions below apply.
- Many field attributes CANNOT be edited. The following ARE editable:
  - Field Display name
  - Field Help Text
  - Hide/Non-editable/Required for user types (defaults to none selected)
  - Hide/Required in languages (defaults to none selected)



- Once a field is added to the form it cannot be inactivated or deleted. If a standard field is not needed – use Hide settings

Field ID	Field Name	DB Name	Field Type	Required	Base Language	Hide	Search	Filter	Sort	Display
1	ref_empl_fname	Employee First Name	Text	Yes	No	No	No	No	No	No
2	ref_empl_name	Employee Last Name	Text	Yes	No	No	No	No	No	No
3	ref_empl_id	Employee ID	Text	No	No	No	No	No	No	No
4	ref_empl_bruid	Employee BRUID	Text	Yes	No	No	No	No	No	No
5	ref_empl_email	Employee Email	Email	No	No	No	No	No	No	No
6	ref_empl_subtime	Employee Submittal Time	Text	Yes	No	No	No	No	No	No
7	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No
8	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No
9	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No
10	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No
11	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No
12	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No
13	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No
14	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No
15	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No
16	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No
17	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No
18	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No
19	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No
20	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No
21	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No
22	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No
23	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No
24	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No
25	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No
26	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No
27	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No
28	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No
29	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No
30	ref_empl_subdate	Employee Submittal Date	Date	Yes	No	No	No	No	No	No

**Standard fields on the Employee Referral form:**

Display Name	DB Name	Field Type	Required (base language)	Notes
Employee First name	ref_empl_fname	Text	Yes	Pulled from employee profile for matching BRUID
Employee Name	ref_empl_name	Text	Yes	Pulled from employee profile matching BRUID
Employee ID	ref_empl_ID	Text	No	Only completed if set in TG config “fields for employee completion”. Employee can complete or can be autopopulated based on mapping in TG social referral config.
Employee BRUID	ref_empl_bruid	Text	Yes	Pulled from employee profile for matching BRUID
Employee Email	ref_empl_email	Email	No	Pulled from employee profile for matching BRUID
Employee Submittal Time	ref_empl_subtime	Text	Yes	Autopopulated with date time stamp when employee submits candidate YYYY-MM-DD:HHMMSS
Employee Submittal Date	ref_empl_subdate	Date	Yes	Autopopulated with Date when employee submits candidate



Display Name	DB Name	Field Type	Required (base language)	Notes
Employee Ownership Expiration Date	ref_empl_expdate	Date	No	Autopopulated with date based on TG Social Referral setting "Ownership period (days)" from the date the candidate applies. Is blank if setting =0
Candidate First Name	ref_cand_fname	Autofill	Yes	From applicant master
Candidate Last Name	ref_cand_lname	Autofill	Yes	From applicant master
Candidate Email	ref_cand_email	Autofill	No	From applicant master
Candidate Resumekey	ref_cand_resumekey	Autofill	Yes	From Applicant master (candidate reference number)
Req ID	ref_reqid	Text	No	Autopopulated with Auto or optional req ID (based on client setting) of job applied to (only if applicable - referred to specific jobs). This field populates even if ownership is per candidate.  If multiple job applies at same time, concatenate using pipe ( ).
Candidate Application Time	ref_app_time	Text	Yes	Autopopulated with date time stamp when candidate applied  YYYY-MM-DD:HHMMSS
Candidate Application Date	ref_app_date	Date	Yes	Autopopulated with date when candidate applied
Owns Referral	ref_empl_owns	Single select	Yes	Identifies ownership approval or not for this employee based on RAM settings  Options: Pending

Display Name	DB Name	Field Type	Required (base language)	Notes
				Yes No Client can translate options.
Referral Status	ref_status	Single Select	No	Client can define their own options and set accordingly in RAM. This is required in order for the Referral status to populate on the Talent Record.
Referral Status Candidate Mask	ref_status_cand_mask	Single Select	No	Client can define their own options and set accordingly in RAM. Currently this status does not display to the candidate, but it may be a future enhancement to the Candidate Job Status page.
Referral Status Employee Mask	ref_status_empl_mask	Single Select	No	Client can define their own options and set accordingly in RAM. This displays to the employee on the Referral Status page>Referral Activity table – therefore it should always be populated.
Referral Tier	ref_status_tier	Single Select	No	Client can define their own options and set accordingly in RAM if tiers are desired.
Primary Source	ref_status_prim_src	Single Select	No	Uses source code list Automatically populated based on social media/referral source.
Secondary Source	ref_status_sec_src	Single Select	No	Uses source code list Only populated by client RAM config if a secondary source is desired on the referral form.

## For Talent Gateways

There are many TG settings that turn on the functionality and configure widget options for a given gateway. These settings are enabled only if the client setting for Per Req or Per Candidate is on. High level list includes:

- New selection to define a referral candidate type.
- New selection of Forms to attach to TG only for candidate referrals is available.
- For GQ's, a new option to define a widget to be tied to a referral is available.
- Email reminder communication options.

Social referral is available on all Full TGs, active and inactive, and for member level sites for GTGs.

## Talent Gateway Settings – Workbench Self-Service (Tiers 5+)

The main Talent Gateway setting for social referral is the **Enable Social Referral**. Enable Social Referral acts as an activation button for TGs. It should be selected only after all of the Social Referral configurations options have been made. This allows you to configure settings prior to activating them. . Social Referral configuration options are enabled only for member level sites.

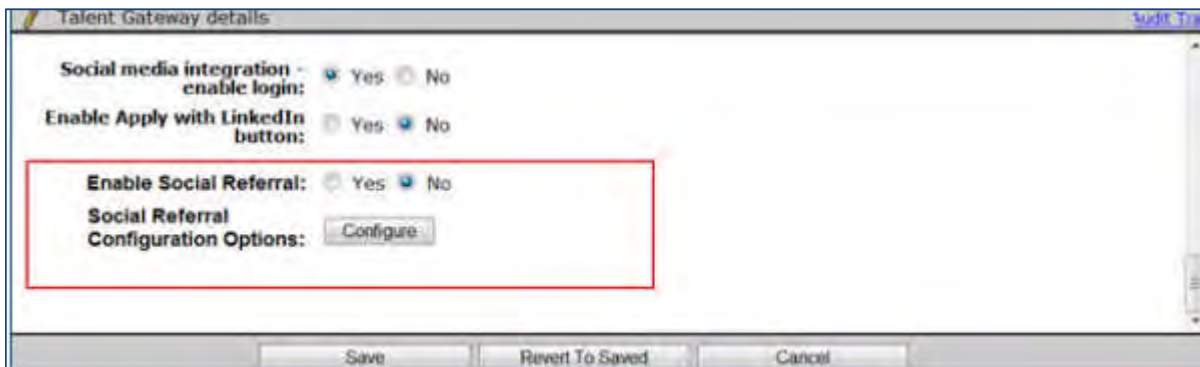
### If you are changing an existing ERG to Social Referral

- Changing a gateway from ERG to Social Referral is allowed. Once this is done, the gateway no longer functions using the existing ERG functionality, but instead uses the new Social Referral functionality. However, the history of candidates submitted through the old workflow is retained BrassRing through the “Legacy Referral History” link.
- When “Enable Social Referral” is selected, then “Enable Employee Referral Gateway” is deselected and all of the linked ERG TG Admin settings that were previously checked and disabled become enabled.
- Updates to previously unavailable settings then become available.
- This can also be achieved by manually deselecting the ERG setting before enabling Social Referral.
- Note that text customizations, including button text for “Apply” button, must be reviewed and changed accordingly. If the intent of the gateway is solely for referrals, there is currently no way to remove the “Apply” button (but this is desired for the future).

New Talent Gateway settings:

- **Enable Social Referral**
- **Social Referral Configuration Options**

1. **Workbench > Tools > Talent Gateways > Edit [selected TG]**



2. Select **Social Referral Configuration Options**.

The Talent Gateway - Social Referral Configuration dialog box launches.

**Talent Gateway Settings - Social Referral Configuration**

Referral Candidate Type: External

Referral Forms for Candidate Completion - TG Application: Selected (0)

Referral Fields for Employee Completion: Employee\_Referral\_PC - Select Field(s):  
Selected (0)

Referral Workflows Available:  
Send to my contacts  
Post to my network  
Send via email

Referral Sources Available:  
LinkedIn  
Facebook  
Twitter

Referral Ownership Period (Days): 0

Referral Reminder Email Frequency (Days): 0

Referral Reminder Email Iterations: 0

Referral Reminder Email Expiration (Days): 90

Referral Reminder Email Template - Employee: Selected (0)

Referral Initial Email Template - Employee: Selected (0)

Referral Reminder Email Template - Candidate: Selected (0)

Referral Initial Email Template - Candidate: Selected (0)

Referral Initial Status: Referred Pending

Referral Expiry Status: Referral Expired

The following list describes each of the configuration fields on the Social Referral Configuration dialog box:

- **Referral Candidate Type:** User can specify which candidate type referral candidates should automatically be set to when coming in through the specified TG. If not specified, then standard candidate type settings are used based on the TG candidate where the candidate applied.
- **Referral Forms for Candidate Completion – TG Application:** User is able to select one or more candidate forms that **ONLY** referral candidates applying through the redirect TG would receive and answer during the application process. This is for TG applications (not GQ).
  - List contains: Active candidate forms excluding Talent Gateway and Employee Referral forms.
  - There is no validation on this field. It is recommended that the user should not pick the same forms that are already attached to the Redirect Talent Gateway. Once a form is selected and saved, then rules for inactivation of that form should follow those for inactivating forms used by other configuration – stand workbench error messaging should display referencing Social Referral Configuration.



Enabling (Yes) adds a new button called “Send Referral.” This is available for all TG’s, although generally only *Internal TG and ERG* would use it.

- **Referral Fields for Employee Completion:** User is able to select one or more fields from the standard Employee Referral form that **employees would answer** as they submit the referral through the widget. These fields display as a new tab on the profile page.
  - If none selected, the new tab does not display
  - These questions should pertain to the employee overall, not the specific referral
  - If referral specific questions are needed, it is recommended that those be handled in a subsequent communication based on granting ownership
  - Any fields that are automatically populated when the candidate is submitted or set via RAM (shown in the Form Field section above) should not be selected. Essentially, only the employee ID and other custom fields added should be selected here
  - If the client wants to include Employee ID, it SHOULD be added to the form or it is not populated (even if mapping social referral setting is selected)
  - When the employee logs on to a social referral gateway for the first time, a prompt launches to prompt the employee to complete the new tab only if there is one or more required field with no answer
  - Employee is prompted to complete the fields once. But employee is free to return to edit profile to make changes
- **Referral Workflows Available:** User can pick and choose 1 or more of the workflows that display on this TG. Only those selected here display for selection on widget. At least one selection is required.
- **Referral Sources Available:** User can pick and choose which networks can be utilized to select contacts from. Only those Social networks selected here display for selection on the Social Referral widget as well as on the Social Network Info page (along with those selected for the TG).
  - Options pull from those selected for Social Networks Client Setting
  - Applies to Workflows of “Send to my contacts” and “Post to my network” only
  - Required selection when these workflows are selected
  - Currently only Facebook applies to “Send to my contacts”
- **Referral Ownership Period (Days):** Used to populate the date on the standard Employee Referral form fields “Employee Ownership Expiration Date”. The number of days set here is added to the candidate submittal date to initially set the date. Must be a number 0-365. 0=No expiration date is populated.
- **Referral Reminder Email Frequency (Days):** This reminder is when an employee has sent out a link and the candidate has not yet responded to that link. It is the number of days between email reminders. Must be a number 0-365. 0 = No reminders are sent.
- **Referral Reminder Email Iterations:** Number of total reminders that are sent. Must be a number 0-10. 0 means no reminders are sent. A maximum of 10 reminders are allowed.
- **Referral Expiration Email Expiration (Days):** Number of days from referral submission whereby no additional reminders are sent. Also, if candidate clicks link beyond this point, a page informing them the posting is no longer available for referral displays. Must be a number 1-365. This is a required field and default is 90.
- **Referral Reminder Email Template – Employee:** Email template selection for the reminder email to **employee** when candidate has not responded to link. **NOTE:** only Req tokens are supported. Please do not use any other tokens in templates are selected for referral reminder and initial emails to candidates and employees. If non supported tokens are used, they display the text of the token and no value.
- **Referral Reminder Email Template – Candidate:** Email template for the reminder email to **candidate** when candidate has not responded to link. . **NOTE:** only Req tokens are supported. Please do not use any


other tokens in templates selected for referral reminder and initial emails to candidates and employees. If non supported tokens are used, they display the text of the token and no value.

- **Referral Initial Email Template – Employee:** Email template for the initial email to **employee** after referring. **NOTE:** only Req tokens are supported. Please do not use any other tokens in templates selected for referral reminder and initial emails to candidates and employees. If non supported tokens are used, they the text of the token and no value.
- **Referral Initial Email Template – Candidate:** Email template for the initial email to **candidate** once he/she has been referred. **NOTE:** only Req tokens are supported. Please do not use any other tokens in templates selected for referral reminder and initial emails to candidates and employees. If non supported tokens are used, they display the text of the token and no value.
- **Referral Initial Status:** User can enter a text value to display to employee on referral status page. It displays on the Referral Status page for “Referral Status” until candidate selects the link and completes application. At which point, the referral status employee mask field on the candidate form is utilized instead.
  - 255 characters and no restrictions on HTML or special characters
  - Examples: “Pending candidate response” or “Waiting for Candidate to apply”
- **Referral Expiry Status:** User can enter a text value to display to employee on referral status page. This is the status displayed on the Referral Status page for “Referral Status” once the referral link has expired.
  - Text box: 255 characters and no restrictions on HTML or special characters
  - Examples: “Link Expired” or “Expired”
- **Referral Link Redirect:** Defines what TG the referral candidate is directed to when applying. Required in order to “Enable Social Referral” on the current gateway. Contains all active Full and Global TG’s including excluding SSO gateways, Gateways where Social Referral is enabled, the current gateway and Basic gateways.
- **Referral Employee ID Field Mapping:** Select what custom field contains Employee ID for this TG. This mapping allows the employee ID field to be populated on the Referral Tab for the employee, and then is populated on the candidate form when the candidate submits the application. List contains all active candidate form fields from form type of single per candidate form only of the field type of text, text area and numeric + Candidate stacking field.
  - **NOTE:** Even though all form fields display, only a form that was attached to the TG for employees, or part of a TG profile import, or candidate stacking field should be selected here. There is no WB validation for this.
- **Referral Status Page Display:** Enables the link for the referral status page on this TG.
- **Allow Jobless Referral:** Check to give employees the option to send jobless referrals via the “Send General Referral” link to the home page of the Talent Gateway. Select the appropriate option for where the candidate is directed when selected, either to submit their resume without a job or to search openings so a job can be selected by the candidate. If per req ownership is set, Job Submission page is not selectable.
- **Referral NOT Available Req Field Value Mapping:** When Reqs are posted to a Social Referral gateway with this option set, “Send Referral” is not available for that job, and the job is identified in the search results with a NOT available for referral icon as shown in the following figure.



Referral NOT available icon displays the referral icon within a slashed out red circle.

Use if the gateway is “dual use” Internal and Referral. Select one Req field that has options, and then select from its options those that are to be considered as *not* available for referral.

 The option to configure jobs as not available for referral is provided for dual-purpose gateways that are used for both internal openings and referrals. In those cases, Send Referral is disabled and the Not Available for Referral icon displays on the Search Results Page, Job Cart, Featured Jobs, and the Job Details page.

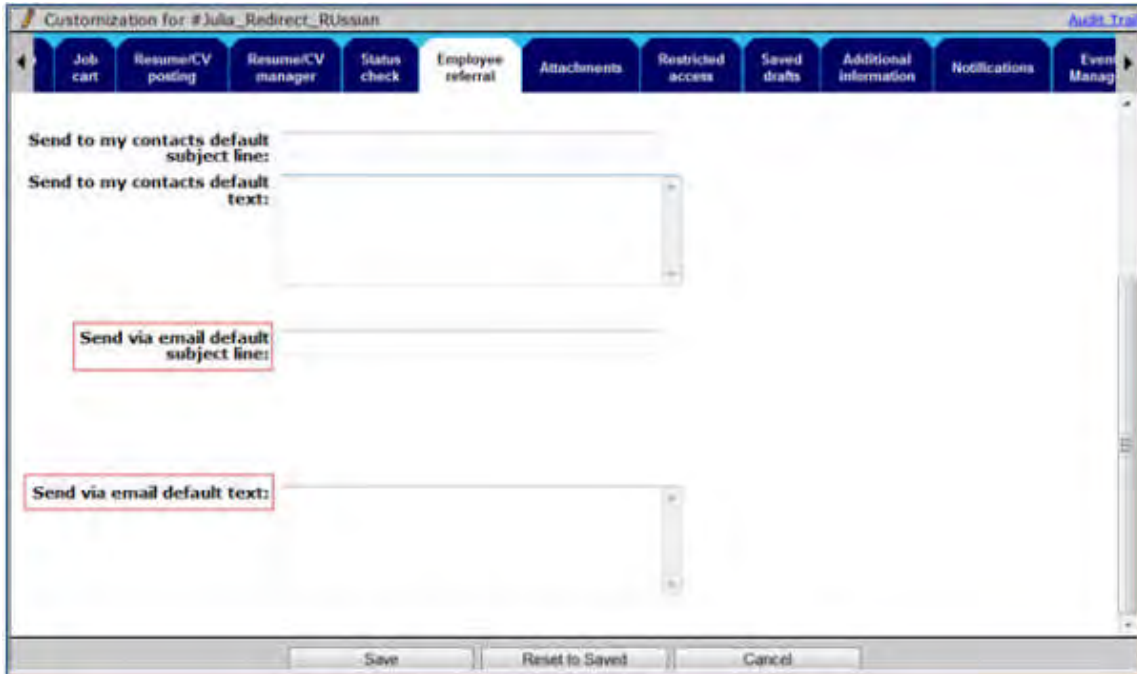
3. Select **Save**.
4. Select the **Yes** radio button to Enable Social Referral.
5. Select **Save**.

### Talent Gateway Text Customization – Workbench Self-Service (Tiers 1+)

For the TGs that have the Social referral configurations set (though not active), within the ‘Text Customization’ section of TGs, under the “Employee Referral” tab, following changes appear:

- Send via email default subject line - allows input (255 chars) for the default text that can display on the referral widget for the "Send via email" workflow.
- Send via email default text - allows input (1000 chars) for the default text that can display on the referral widget for the "Send via email" workflow.





For the TGs that have the Social referral configurations set (though not active), within the 'Text Customization' section of TGs, under the "Landing" tab, the following changes display:

- Enabled when the social referral configuration setting of "Allow jobless refer" is selected for the gateway.
- If not selected, the text box and "Reset to default" button are disabled.

Customization for AC Referral Redirect TG Audit

[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](#)

**Welcome text:**  [Show me](#)

**Search openings summary text:**  [Show me](#)  
View current job opportunities, or search on specific criteria to find jobs that match your interests.

**Site general submission link text:**  [Show me](#)  
Submit resume/CV

**Site general submission summary text:**  [Show me](#)  
You may use this feature to send your resume/CV without submitting to a specific job.

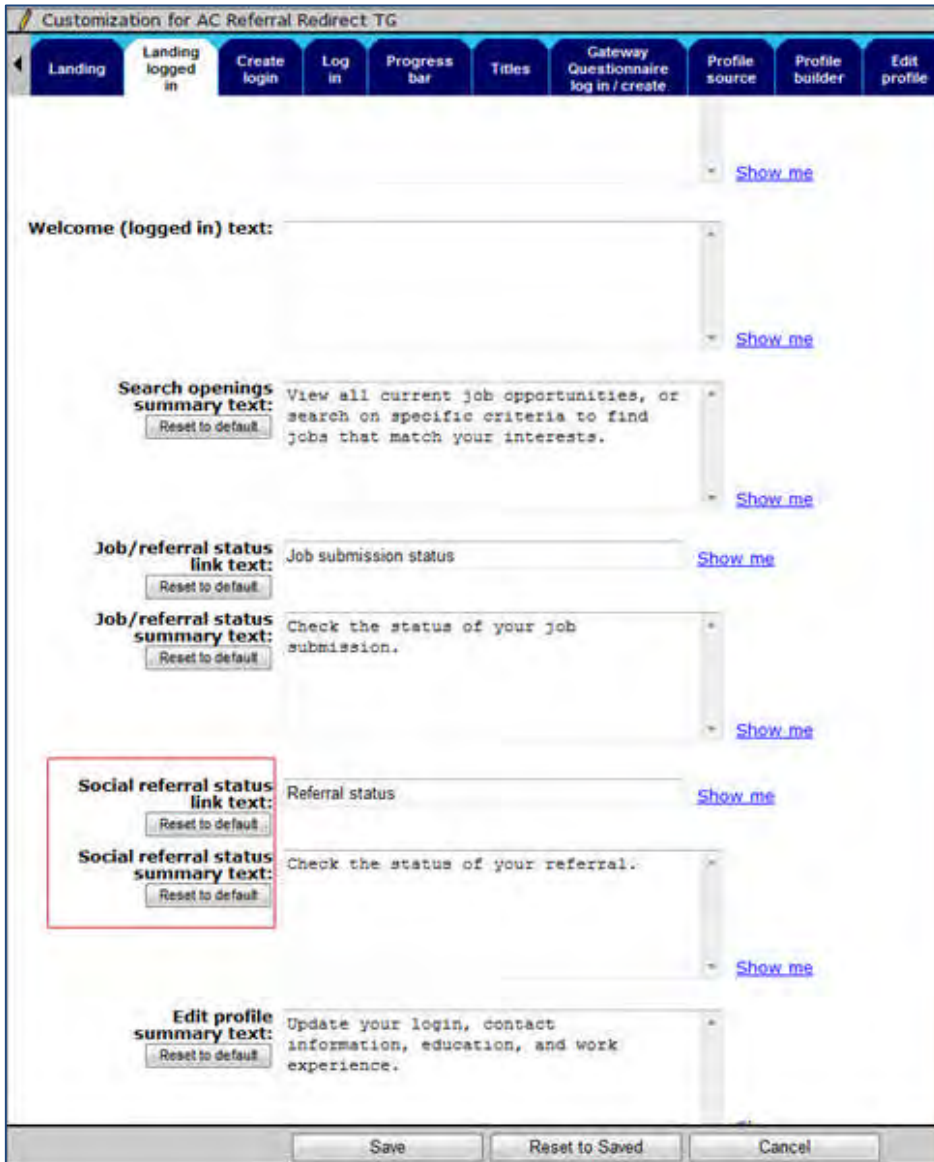
**Referral general submission link text:**  [Show me](#)  
Submit general referral

**Referral general submission summary text:**  [Show me](#)  
You may use this feature to send a referral link without referencing a specific job

**Landing meta tag text:**  [Show me](#)  
<meta name = "#ClientName#" content = "landing page"/><meta name = "description" content = "Welcome to #Clientname#. Search for Internet job openings."/><meta name = "keywords" content = "BrassRing, search openings,

For the TGs that have the Social referral configurations set (though not active), within the 'Text Customization' section of TGs, under the "Landing logged in" tab, these changes appear:

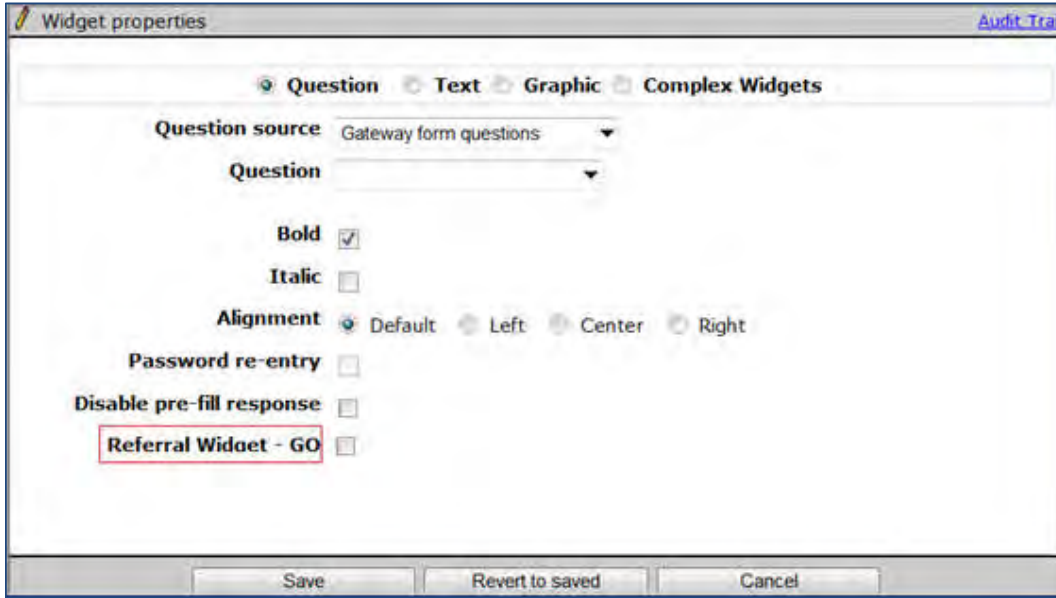
- Enabled when the social referral configuration setting of "Referral status page display" is selected
- If not selected, the text box and "Reset to default" button is disabled



## Gateway Questionnaire Widgets – Workbench Self-Service (Tiers 0+)

**Tools > Gateway Questionnaires > Add new Gateway Questionnaire / [select existing *draft*] > Administer sections/pages > Administer widgets / Add new widget**

Check **Referral Widget – GQ** (*attribute\_name*) so that the GQ widget displays ONLY for referral candidates coming in through the TG. This allows custom questions to be asked for referral candidates applying on the same TG as other non-referral candidates.



- When “Branching (also required)” is selected, the **Referral Widget – GQ** field is disabled. Conversely, when the Referral Widget is selected, branching is disabled.

## Client Settings – Workbench Self-Service (Tiers 7+)

Only when the new client setting “Social Referral” is set to either “Per Candidate” or “Per Req” does the following display on the page “Social media configuration.”

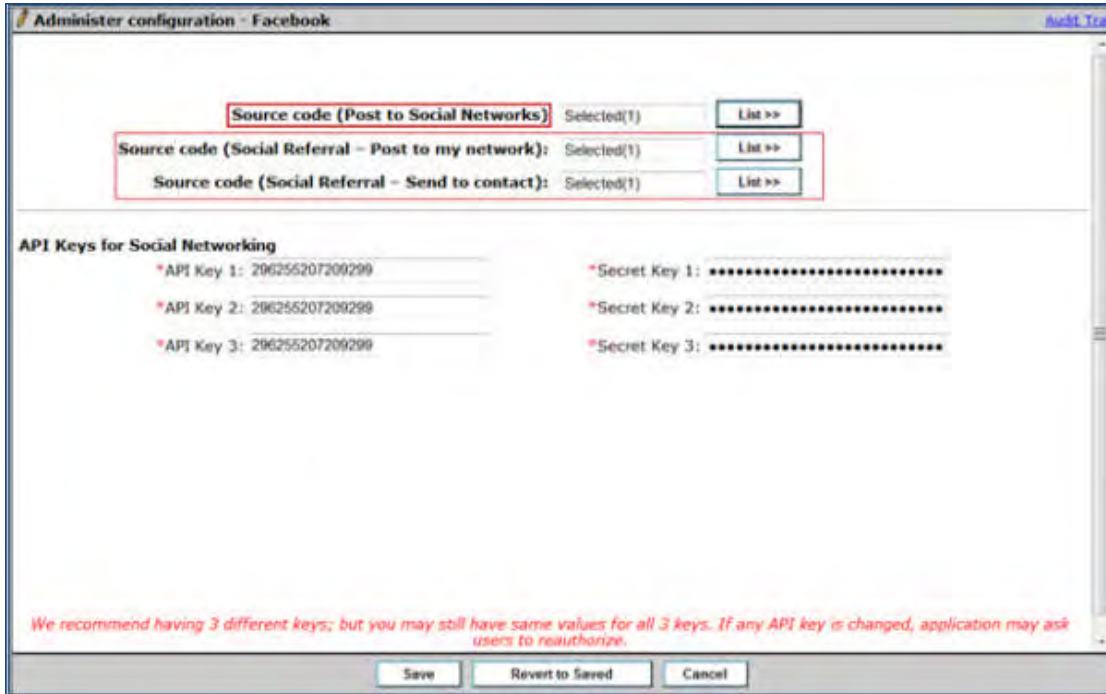
**Navigation/File path:** Tools > Settings > Social media configuration



- Social media Configuration” page displays with the below mentioned changes ONLY when the new client setting “Social Referral” is set to either “Per Candidate” or “Per Req”.
  - Page name changes to "Social Media/Referral Configuration".
  - Existing column name “Social Media site” is renamed to “Social Media site/Referral Workflow".
  - New row is added to the existing social media sites as follows:-
  - Send via Email
  - New row has icons for ‘View’ and ‘Administer’ configuration

## “Administer Configuration” for Facebook / LinkedIn/ Twitter

**Navigation/File path:** Tools > Settings > Social media configuration > Administer configuration icon for Facebook.

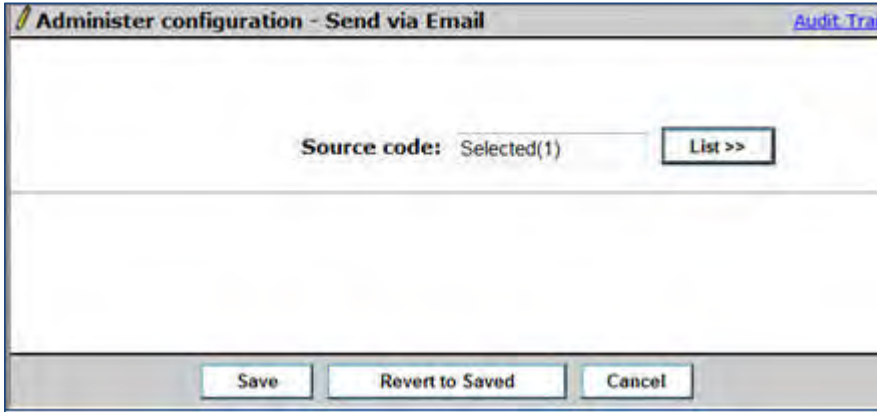


- When “Administer configuration” icon is selected either for Facebook/ LinkedIn/ Twitter, a pop up window opens up, this is the existing functionality.
- In this pop up window, existing source code label should be renamed to “Source code (Post to Social Networks)
- Within Facebook and LinkedIn windows, two new source codes should be added below the existing source code field as follows:
  - Source code (Social Referral – Post to my network)
  - Source code (Social Referral – Send to contact)
- For LinkedIn window, the above two new source codes should be placed in between the existing fields - Source code and Cross system API key.
- Within Twitter window, single new source code should be added below the existing source code field as follows:
  - Source code (Social Referral – Post to my network)
- When the “List” button is selected for any of the new source code fields, the “Available” list should be pulled from the same source code list of the existing “Source Code” field.
- The same code can be selected for more than one source code type within a social network.

## Administer Configuration for Send via Email/ Copy Referral Link

When “Administer Configuration” icon is selected either for “Send via Email” or “Copy Referral Link”, a pop window should open with the title “Administer Configuration”.

**Navigation/File path:** Tools > Settings > Social media configuration > Administer configuration icon for Send via Email

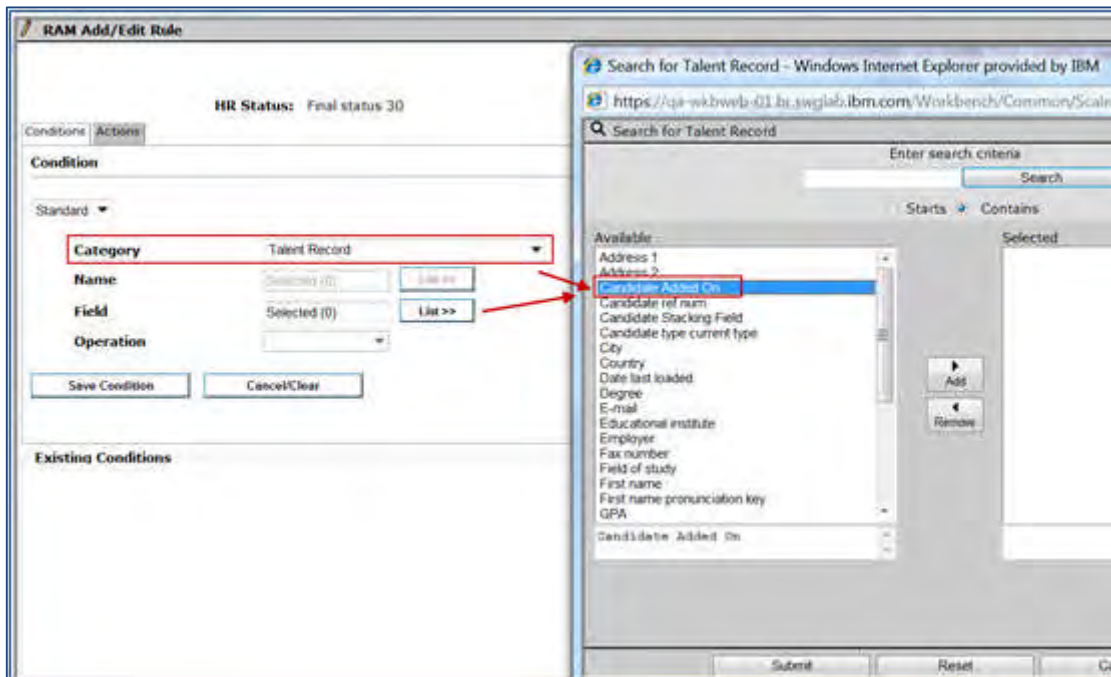


- Sub-title within the individual pop ups should display the respective title as follows:-
  - Administer configuration – Send via Email
  - Administer configuration – Copy Referral Link
- Each of these pop ups should have the “Source code” field as shown in the figure below.
- When the “List” button is clicked for the “Source code” field, the “Search for Codes” pop up window should open similar to the “Source code – List” button of any of the existing Social media by pulling the “Available” list from the same source.

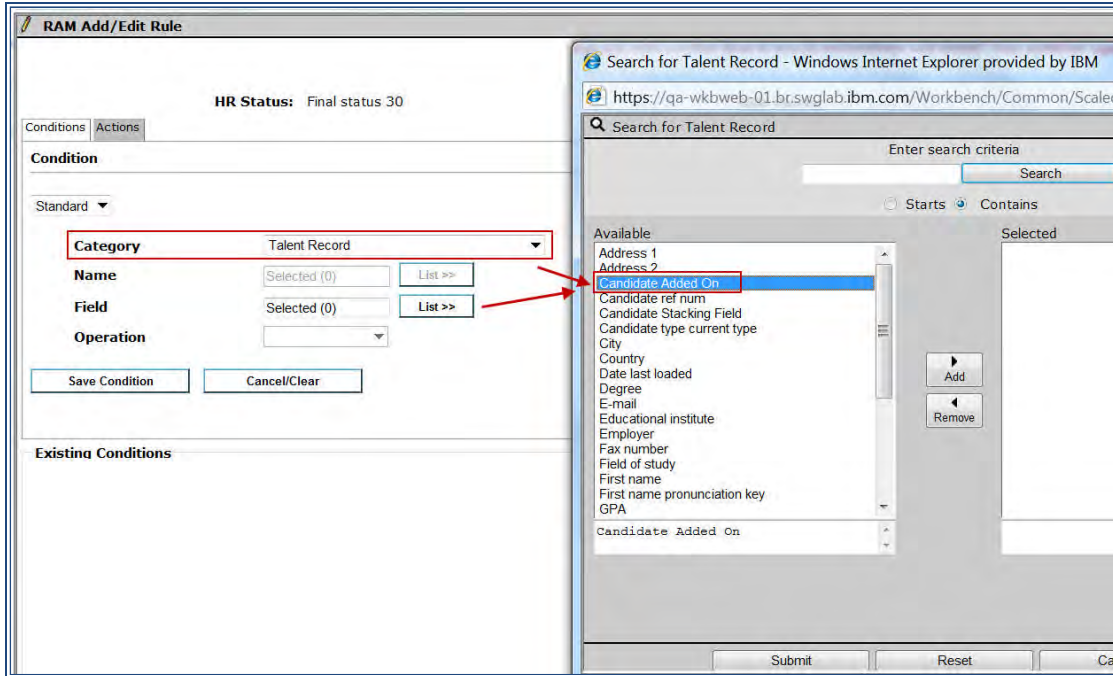
## Rules Automation Manager – Workbench Self-Service (Tiers 7+)

RAM handles ownership settings that can be configured by the client. There are two changes required in RAM to accommodate this:

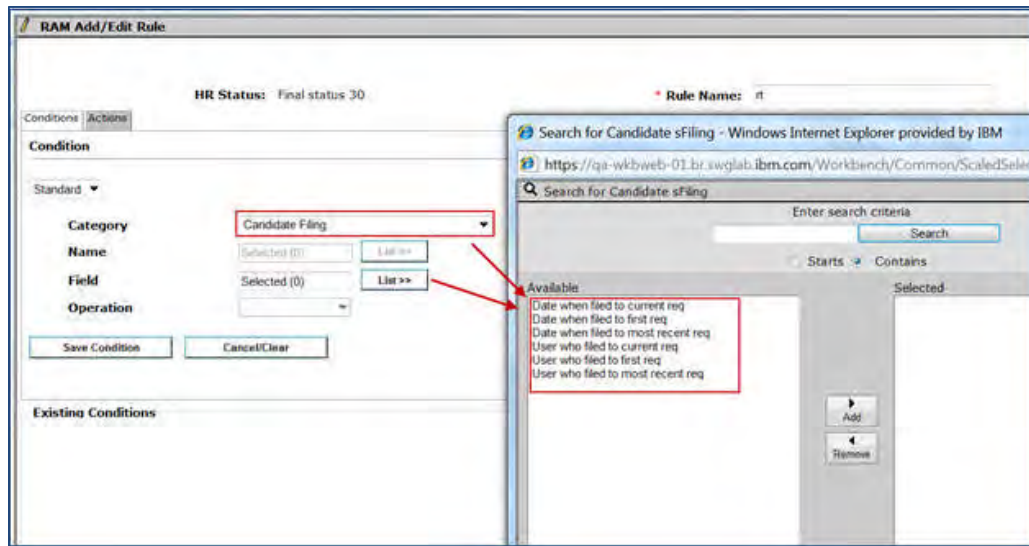
- A new field called 'Candidate Added On' is to be added to the existing category called "Talent Record. “








- New Category similar to 'Talent Record' called "Candidate Filing" now has six new options under Fields to select from:
- Date when filed to current req
- Date when filed to first req
- Date when filed to most recent req
- User who filed to current req
- User who filed to first req
- User who filed to most recent req



- "Candidate Filing" category is NOT visible for the following trigger mechanisms:



- Req Create; Req Edit; Req Open; Req Approved; Req Declined; Req Deleted; Req Cancelled; Req On Hold; Req Pending; Req Closed;
- Req Subsidiary Form Approval; Req Subsidiary Form Insert; Req Subsidiary Form Insert or Update; Req Subsidiary Form Update
- Referral form can be sent using an eLink in Edit mode only through RAM (though it is a MPC/MPCR form type). This is driven by a Form level setting Send for in Edit mode. For this the Trigger mechanism should be on the same candidate form.

	<ul style="list-style-type: none"> <li>– Referral Owns for a Per req based client need to be populated with Yes, when candidate is NOT already in the folder</li> <li>– Referral Owns for a Per req based client need to be populated with NO, when candidate is already in the folder</li> <li>– Referral Owns for a Per Candidate based client need to be populated with Yes, when candidate is NOT already in the folder</li> <li>– Referral Owns for a Per Candidate based client need to be populated with NO, when candidate is already in the folder</li> </ul>
---	--

## Sample RAM Conditions - For req

### Rule 1: Else

-----

#### Conditions:

- Candidate Filing
- Form Multiples - Not Applicable
- Date when filed to first req >DD (-365)

- 
- Candidate Filing
  - Form Multiples - Not Applicable
  - Date when filed to first req <DD (0)

- 
- Candidate Filing
  - Form Multiples - Not Applicable
  - Date when filed to current req < (Candidate forms.Employee\_Referral\_PR.Candidate App..)

-----

#### Actions:

- Populate Field Values: Candidate forms: Employee\_Referral\_PR
  - Form Multiples - Update most recently edited form instance
  - Owns Referral = (No) setfield View Details
  - Form Multiples - Not Applicable
- 

Exit exit View Details

### Rule 2: Social Referral

---

Conditions: No conditions available

Actions:

- Populate Field Values: Candidate forms: Employee\_Referral\_PR
- Form Multiples - Update most recently edited form instance
- Owns Referral = (Yes) setfield View Details

## Sample RAM Conditions – for candidate

Rule 1: Else

---

Conditions:

- Talent Record
- Form Multiples - Not Applicable
- Candidate Added On >DD (-365)

- 
- Talent Record
  - Form Multiples - Not Applicable
  - Candidate Added On <DD (-1)

---

Actions:

- Populate Field Values: Candidate forms: Employee\_Referral\_PC
- Form Multiples - Update most recently edited form instance
- Owns Referral = (No) setfield View Details
- Form Multiples - Not Applicable

- 
- Exit
  - Exit exit View Details

Rule 2: Social Referral

---

Conditions: No conditions available

Actions:

- Populate Field Values: Candidate forms: Employee\_Referral\_PC
- Form Multiples - Update most recently edited form instance
- Owns Referral = (Yes) setfield View Details

# Talent Gateways – Req Association for Attachments

Candidates now have an option to associate attachments to their current and previous job submissions.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
Feature Areas LDP 244	BrassRing Talent Gateways	Workbench Self-Service
Visible Changes	No – requires specific conditions / configuration for visibility.	
How do I get this feature?	Configuration required – contact our Support Team for implementation details.	

## Feature Description

A new Talent Gateway setting is added in the Workbench Talent Gateway Details page. Clients can configure this setting and enable candidates to associate the attachments they add through their BrassRing Talent Gateway profiles to specific job submissions.

Depending on the category of attachment selected by the candidate, the client's configuration of the category type and the user type configuration of the BrassRing user that accesses the candidate's Talent Record, access to the attachment may or may not be restricted.

## Candidate Experience

The attachments tab in the Edit Profile section of BrassRing Talent Gateways now displays a new section. Candidates associate the attachments they upload to their job submissions from the **Job Submissions** grid in this section. This section also details the steps that candidates need to take in order to associate the attachments to their job submissions.

Candidates select an attachment from the attachments table, and the job by checking the check box in Select Job column. They select Associate attachments to job submissions to complete the association. Upon successful association a confirmation message is displayed and the selected attachments are added to the drop down list in the "Associated attachments" column of the Job Submission grid.

LD256 ? Help

**Edit profile** Social networking information

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.

Contact information Work experience Education **Attachments**

File name	Category	Size	Date uploaded	Action	Select
5 steps to change your life.jpg	ArtCat1	354 kb	18-Aug-2014 06:08	<input type="button" value="Delete"/>	<input type="checkbox"/>

**Upload attachments**

The attachment must have a file extension of .avi, .bmp, .csv, .doc, .gif, .jpg, .mov, .mp3, .mp4, .mpeg, .mpg, .ppt, .pdf, .rtf, .swf, .tif, .wmv, .xls, .xml, .docx, .pptx, .xlsx

**Add new attachment**

File 1:  No file selected.

**Associate attachments to job submissions**

- Select one or many attachments in the Attachments table.
- Select one or many jobs in the Job submissions table.
- Select the "Associate attachments to job submissions" button.

**Job submissions**

Job submission date	Job requisition ID	Job title	Job status	Select job	Associated attachments
16-Jul-2014	428BR	Test Req'd for Position	Open	<input type="checkbox"/>	JamesAlix_passport_20140812
14-Aug-2014	340BR	AuthnTest 169025	Open	<input type="checkbox"/>	
14-Aug-2014	607BR	New req for testing 882	Open	<input type="checkbox"/>	

**Disclaimer:** By submitting your information, you are indicating consent to our privacy policy

[Privacy policy](#)

**Associate attachments to job submissions**

- Select one or many attachments in the Attachments table.
- Select one or many jobs in the Job submissions table.
- Select the "Associate attachments to job submissions" button.

**Job submissions**

Job submission date	Job requisition ID	Job title	Job status	Select job	Associated attachments
16-Jul-2014	428BR	Test Req'd for Position	Open	<input type="checkbox"/>	JamesAlix_passport_20140812
14-Aug-2014	340BR	AuthnTest 169025	Open	<input type="checkbox"/>	
14-Aug-2014	607BR	New req for testing 882	Open	<input type="checkbox"/>	

## How Do Clients Get this Feature?

This feature is controlled by a new BrassRing Talent Gateway setting, available only for WCAG Talent Gateways.

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

# Configuration Tasks

This section describes the tasks required to configure this feature. Tasks labeled Workbench Self Service can be performed by certified Workbench Self Service users or by our support staff.

## Talent Gateway Settings – Workbench Self-Service (Tiers 5+)

New Talent Gateway setting: **Associate attachments to job submissions/requisitions**

**Workbench > Tools > Talent Gateways > Edit [selected TG]**

The screenshot shows the 'Talent Gateway details' configuration page. At the top, there are several dropdown menus for 'Selected(0)', 'LIST', 'Select All', 'No', 'Don't show', 'Required', 'No', 'MultiSelect', and 'No'. Below these is a 'Custom Label' input field. The 'Filing option' section has two radio buttons: 'Daily filing' and 'Insta-file', with 'Insta-file' selected. The 'Label for candidate supplied source code' section has an input field and a 'Clear' button. The 'Associate attachments to job submissions/requisitions' section is highlighted with a red box and contains two radio buttons: 'Yes' and 'No', with 'No' selected. Below this are two dropdown menus for 'Number of attachments' and 'Max size per attachment (mb)', both set to '0'. The 'Attachment categories' section features two panels: 'Available fields' and 'Selected fields(right)'. The 'Available fields' panel lists 'Common', 'Confidential', 'General', 'Interview Notes RV', 'Sensitive', and 'Uncommon'. The 'Selected fields(right)' panel is empty. Between the panels are 'Add' and 'Remove' buttons. To the right of the 'Selected fields(right)' panel are 'Move Up' and 'Move Down' buttons.

This setting has **No** configured by default. Changing to **Yes** displays the new **Associate Attachments to job submissions** section in the BrassRing Talent Gateways under the Attachments tab.

# Talent Gateways – Candidate Electronic Signature

This feature introduces an electronic signature option for candidates using the Gateway Questionnaire (GQ) job apply workflow on web and mobile-optimized Talent Gateways. Candidates can electronically sign with a mouse or finger if using a touch screen. Signatures are saved as non-editable images and are not reusable.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> <b>LDP 214</b>	<input checked="" type="checkbox"/> BrassRing <input checked="" type="checkbox"/> Talent Gateways	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact our Support Team for implementation details.	

## Feature Description

The Candidate Electronic Signature feature allows clients to capture a candidate's electronic signature when candidates apply using the GQ apply workflow.

When enabled and configured, candidates can enter their electronic signature as they complete their application. The electronic signature field displays as read-only on the application form, on each form that contains the signature field, and on the GQ Job Response form. The signature is stored on the application form, with any sub-forms that make up the GQ.

BrassRing users can configure the electronic signature field as an optional or a required field, and the electronic signature field is supported for Save-as-new functionality (when Workbench users add forms). If the signature field is used in places outside the signature widget (Communication Template, eLink), it displays as read-only text.

Signatures display on each of the forms containing the signature field, as well as the GQ Job Response form. On the GQ Job Response form, the signature displays only once and is placed in accordance with the widget placement.

The Candidate Electronic Signature widget is supported for Mobile Apply (applying via mobile device), but is not mobile-optimized.

Target users of this feature are candidates, recruiters, and vendors.

The text form field attribute field can accommodate 255 characters.

## BrassRing User Experience

BrassRing users can view candidate electronic signatures on the Talent Gateway via their Forms view.



User can select Print to print the PDF image or View Image PDF to view the candidate's signature. Signature images are 177 X 76 pixels.

## Candidate Experience

When enabled, candidates submitting applications via the GQ Job Apply can sign their signatures electronically.

Candidate logs into a Talent Gateway (TG) and:

1. Selects a requisition.
2. Selects Apply to Job.  
The GQ launches.
3. Completes required job application fields.  
The signature field launches.  
If the signature field is marked as required, an asterisk displays to the left of the field.



4. Signs their electronic signature using their mouse or finger.
5. To optionally preview, selects Preview. User can optionally select Clear and Back to reenter their electronic signature.
6. Selects Submit.



## Limitations and Known Issues

This feature is only available for GQ job apply workflow. In addition, signatures are not saved when using the BrassRing Save As Draft functionality.

The signature form field:

- does not support standalone candidate forms or forms import
- does not honor prefill rules and must be entered each time a candidate needs to sign
- is not editable and does not accept text entry
- is not available as a merge field

### Signature Form Field:

The signature field is hidden in the following flows:

- Basic TG signature on attached form
- Basic TG signature as default question
- Full TG signature on attached form
- Full TG jobless apply signature as default question
- Full TG signature as job site question
- Referral TG signature on attached form to Gateway
- Referral TG signature on candidate elink forms attached
- Referral TG Signature as job question
- Referral TG Signature as default question
- Referral TG signature as referring employee question for non GQ work flow
- Field used to track Complete vs Incomplete Submissions
- Field usAgency Manager signature on attached form
- Agency Manager signature as job site question

The attribute is set to No and disabled for the following forms:

- Background Check Results (Standard) -- Background\_Check\_Integration
- Employee Referral -- Employee\_Referral\_PC
- Employee Referral -- Employee\_Referral\_PR
- Interview Builder Results -- InterviewBuilderResults
- KAS Assessment -- KAS Assessment
- KAS Overall Result -- KASOverallResult
- WOTC Results -- WOTC

For these forms, hover text displays, "Signature field is not available on system forms."

## How Do Clients Get this Feature?

This feature is controlled by a combination of new form and form field attributes and a new GQ complex widget.

Please contact our Support Team or your Certified Workbench User for more information.

# Configuration Tasks

This section describes the tasks required to configure this feature. Tasks labeled Workbench Self-Service can be performed by certified Workbench Self-Service users or by our support staff.

Enabling this feature requires the configuration of:

- form attribute
- form field attribute
- complex widget

At least one form's signature attribute must be enabled when the widget is in use, in order to store the signature.

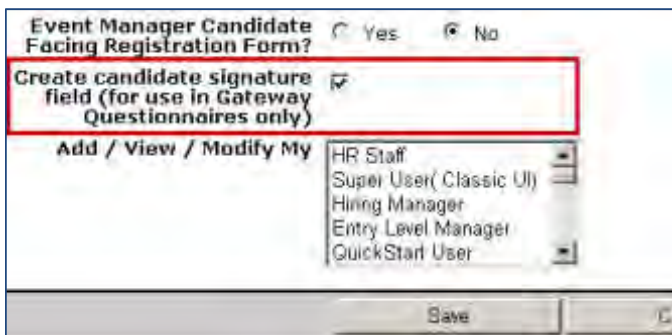
When Workbench users configure and enable the candidate education and experience continuity widgets, the signature field is enabled automatically and displays as the last field on the widget. Candidate and Experience continuity widgets allow clients to capture a candidate's education, employment, and residence continuity information during the job application process on Gateway Questionnaires or standard system forms.

## Candidate Form Attributes – Workbench Self-Service (Tiers 0+)

New form attribute available for the configuration of candidate form fields: Create candidate signature field (for use in Gateway Questionnaires only)

Workbench > Tools > Forms > Candidate forms > Add | Edit form attributes [for selected candidate form]

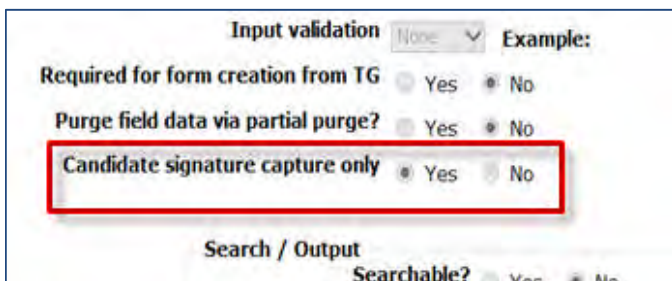
Automatically creates signature field on the selected form. When this form field is included on a GQ that includes the signature widget, candidates can sign in a signature field.



## Candidate Form Field Attributes – Workbench Self-Service (Tiers 0+)

New field attribute available for the configuration of candidate form fields: Candidate signature capture only

Workbench > Tools > Forms > Candidate forms > Add | Edit field attributes [for selected candidate form]



When set to Yes, the field displays the captured signature of the candidate with whom the form is associated.

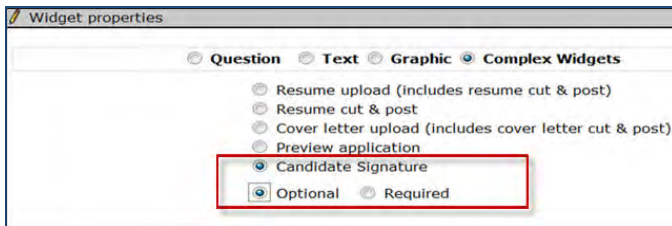
The field can not be used as a merge field, and does not appear in the list of options for merge, including: Communication template (Email section), Document templates, Blurbs and Letter templates.

## Gateway Questionnaire Widgets – Workbench Self-Service (Tiers 0+)

New complex widget: Candidate Signature

Adds the signature capture box to the GQ.

Tools > Gateway Questionnaires > Add new Gateway Questionnaire / [select existing *draft*] > Administer sections/pages > Administer widgets/ Add new widget > Complex Widgets



Select Candidate Signature. and select whether the signature is Optional or Required (on the form).

The widget can be used only once on a GQ, in any place.

# Talent Gateways – Candidate Referral Display

An existing issue on the Job submission status display grid of the Candidate Referral Talent Gateway is now resolved.

IBM® Kenexa® BrassRing® on Cloud Release 13.4	
<b>Feature Areas</b> RDP 730	<input checked="" type="checkbox"/> BrassRing <input checked="" type="checkbox"/> Talent Gateways
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document.
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Specific conditions required – see details below.

## Feature Description

**Background:** Candidate Referral Talent Gateway has issues in displaying a candidate’s information on the **Job Submission Status** grid when the same candidate is referred to multiple positions.

When users return to the Referral Talent Gateway to check the status of the candidates they have referred, the name of any candidate who was referred to multiple positions was displayed in the first row and then the rest of the rows were blank. Similarly the **Referral status** column was also blank except for the first row.

Referral submission date	Job requisition ID	Job title	Referral name	Referral status	Referral status description
31-Mar-2014	7BR	QA Engineer	Kumar, Kumar	Un-reviewed	
31-Mar-2014	8BR	SQA Engineer			
31-Mar-2014	9BR	Sr. SQA Engineer			

This issue is now resolved. Candidate information is displayed in all rows, with each row of the Job Submission Status grid displaying data specific to the Req ID without any issues.

Referral submission date	Job requisition ID	Job title	Referral name	Referral status	Referral status description
31-Mar-2014	7BR	QA Engineer	Kumar, Kumar	Un-reviewed	
31-Mar-2014	8BR	SQA Engineer	Kumar, Kumar	Un-reviewed	
31-Mar-2014	9BR	Sr. SQA Engineer	Kumar, Kumar	Un-reviewed	

## Limitations and Known Issues

This feature is available only on WCAG enabled Referral Talent Gateways.

## How Do Clients Get this Feature?

This feature is controlled by existing client settings related to Referral Candidate Talent Gateways. Please contact our Support Team for more information about enabling this feature.

# Configuration Tasks

## Client Settings – Workbench (Support Staff)

**Workbench > Admin > Manage Clients > Edit client settings** [for selected client]

The following client settings related to referral Talent Gateways must be enabled for this functionality.

**Log HR status change** should be set to “Yes”

**Log req status change** should be set to “Yes”

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

- Lockout Period BrassRing: N/A
- Lockout Period Gateway: 10 min
- LockoutPeriod: 10 min
- Log HR status change:  Yes
- Log req status change:  Yes
- Logic for Pre-filling Gateway Questionnaire responses:  Pre-fill if candidate applied on specific Talent Gateway,  any Talent Gateway
- Maps Provider for Proximity search: Bing
- Maps Provider Key: [Redacted]
- MaxFolderSize: 500000
- Maximum Attachment Storage (MB): 100

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

# Talent Gateways – Password Security Enhancement

This feature adds a security enhancement for IBM® Kenexa® BrassRing Talent Gateways that requires candidates to change their Talent Gateway account password on login after a password reset.

IBM® Kenexa® BrassRing® on Cloud Release 14.0	
<b>Feature Areas</b> RDP 1029	<input checked="" type="checkbox"/> Talent gateways
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> No configuration required

## Feature Description

On Talent Gateways, if a candidate forgets their password, they can request a password reset via the BrassRing application or the Global Support Center. If the candidate is on a client's customized Talent Gateway, candidates can request a password reset via the Candidate API. This feature introduces a mandatory password change for candidates after they request a password reset.

For any client sites using the candidate API, the response contains a message indicating that the login was successful; however, the password has to be changed to access the pages. On receiving this response, client sites will have to invoke the Change Password popup via the candidate API.

## Candidate User Experience

When a candidate attempts to login after a password reset, a standard 'Change Password' dialog box launches on the Talent Gateway.

**Change password** ?

Please reset your password as follows:

- Your password must be a minimum of 8 and a maximum of 25 characters.
- Your password must contain at least one of the following special characters: {}[]\_<>~!@#\$%^&\*()\_-+=
- Your password may not contain spaces.
- Your password may not be the same as your login e-mail address.
- Your password may not be the same as any of the 8 preceding passwords.
- Your password will be case-sensitive.

When you have reset your password, you will receive a confirmation e-mail to the e-mail address associated with your user profile.

\* indicates a required field

\*Enter your current password : \_\_\_\_\_

\*Enter new password : \_\_\_\_\_ [Password security tips](#)

\*Confirm new password : \_\_\_\_\_

## Limitations and Known Issues

For any client sites using the candidate API, the response contains a message indicating that the login was successful; however the password has to be changed to access the pages. On receiving this response, client site will have to invoke the Change Password popup via the candidate API.

## How Do Clients Get this Feature?

This feature is available automatically without configuration.



# Talent Gateways – Responsive Job Search

Responsive job search provides job seekers with an improved, device-independent experience when they search for jobs on your BrassRing Talent Gateways where it's enabled. The Talent Gateway pages are able to recognize and respond to the candidates' device type, displaying the information in a format that candidates can most easily use on their device. This provides a consistent candidate search experience regardless of device used to access the job search capabilities.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> LDP 251	<input checked="" type="checkbox"/> BrassRing <input checked="" type="checkbox"/> Talent Gateways	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact our Support Team for implementation details.	

## Feature Description

On Talent Gateways with responsive job search enabled, candidates looking for jobs can use any Internet-connected device, from smart phone, tablet, laptop, to desktop, and have a consistent, easy-to-use interface. The Talent Gateway pages are able to recognize and respond to the candidates' device type, and display the information in a layout appropriate for their device. Responsive job search accommodates any screen size down to a horizontal 320 pixels.

Advantages of the responsive design include:

- Convenient search for jobs (simple and advanced) on any device
- E-commerce style filtering of search results, with configurable filter fields
- Seamless process to search, view job details, begin applying – for mobile devices, candidates apply via Mobile Apply functionality
- Client branding – fonts, images, and colors on the Job Search page are client-configurable

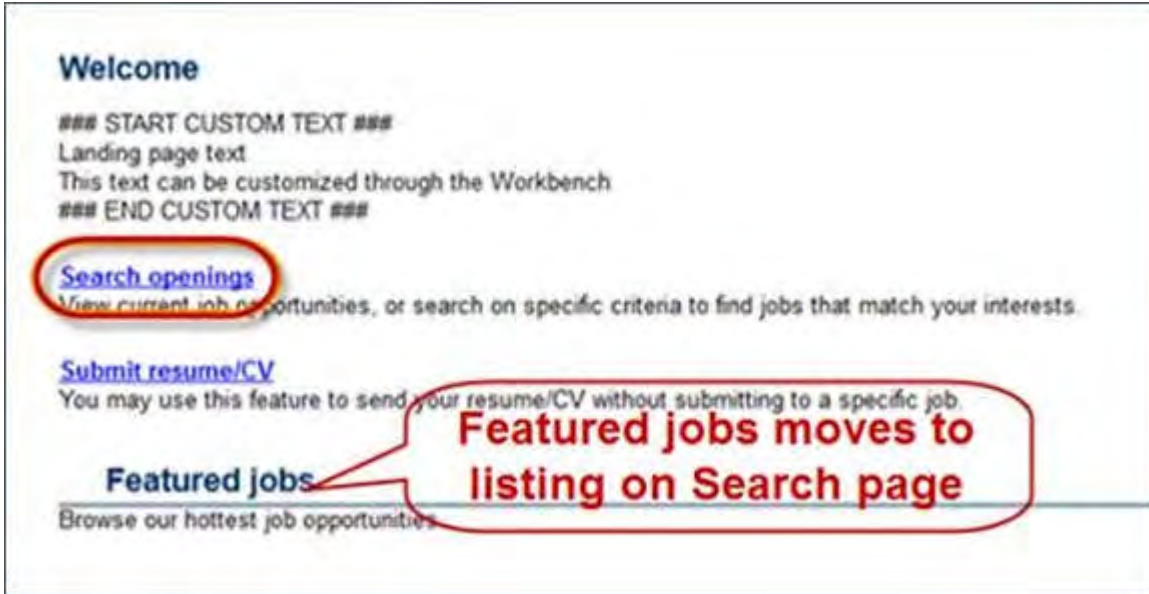
Clients control when the new layout and branding are integrated with their career sites. Responsive layout is enabled in Talent Gateways Details screen, similar to Enhanced layout for Req and Candidate forms.

## BrassRing User Experience

The BrassRing user experience is not changed by responsive search for job seekers. Posting, editing questions, scoring – there is no difference for recruiters and hiring managers using BrassRing.

## Candidate Experience

On Talent Gateways with responsive search configured, candidates access the new responsive search page as usual from the current home page.



There they select **Search Openings**. The responsive search page opens, displaying the layout suitable for their device. The “Featured jobs” grid, formerly displayed on the home page, displays on the search page as a more-easily viewed listing.

Clients also have the choice of displaying “Jobs Near Me”. Based on the job seekers location, jobs that are located closest to them will display.



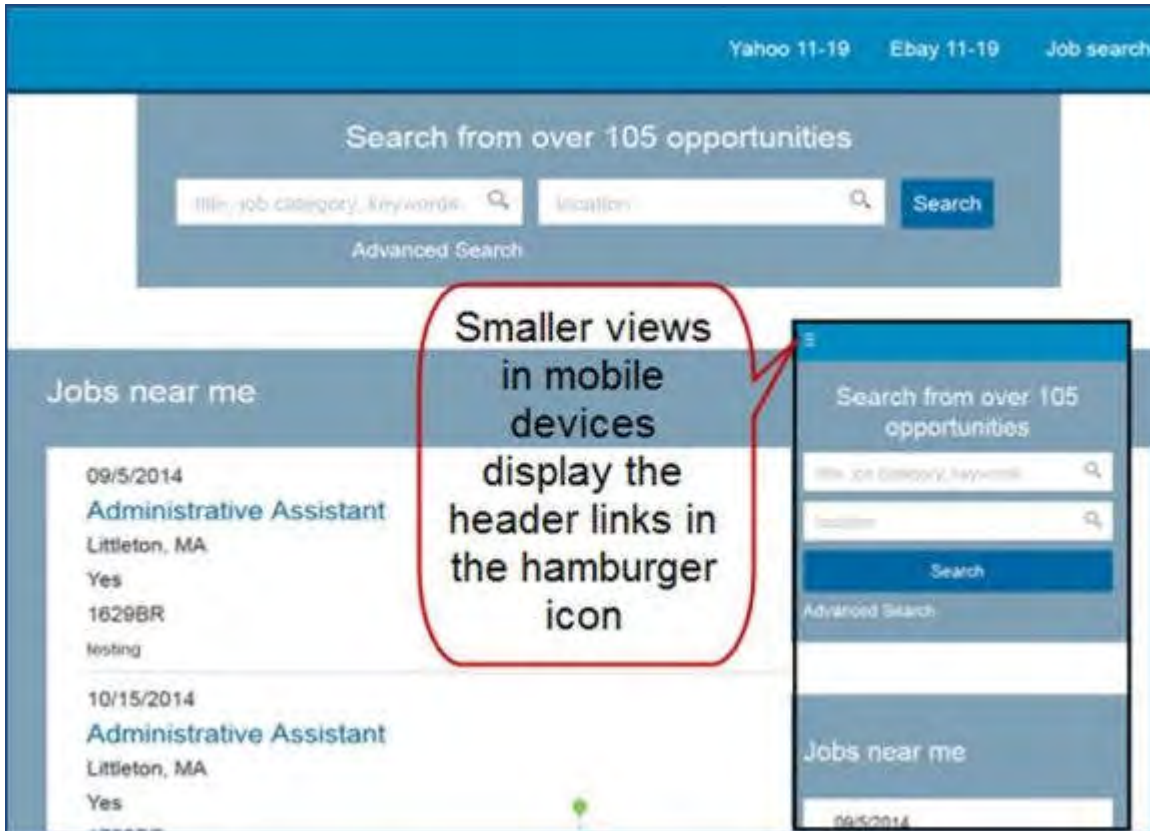
## Comparative Layouts

The following shows samples of how responsive layout looks on desktops as compared to smaller mobile devices.

## Search Openings

Candidates can search openings using Keyword, Location, and Advanced search features, based on the configuration.

The following figure shows a sample responsive Search Openings desktop full screen view, with a typical mobile view inset.

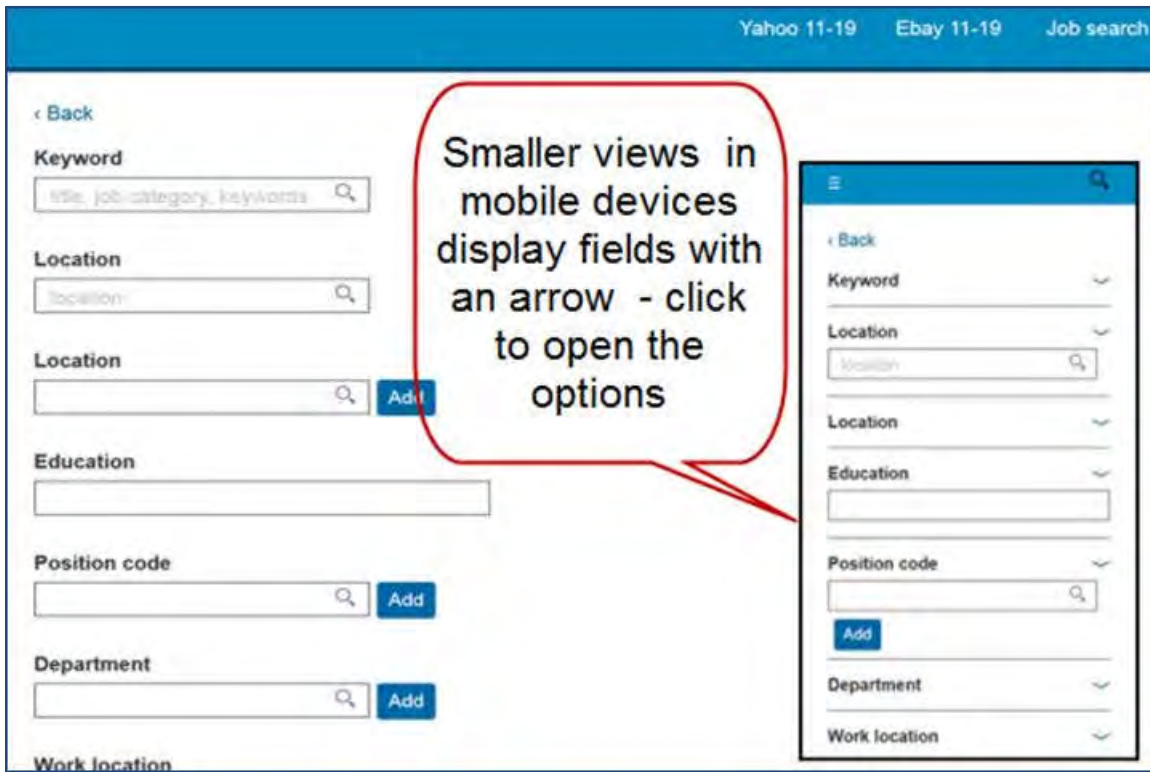


The keyword search box has an auto-complete feature as candidates type, providing a list of matching options for their convenience. Up to 10 matching items are displayed at one time, provided there are at least 10 matches to the entered criteria.

- To perform the search after entering criteria, candidate clicks the Search button.
- To access the links to other actions, selects the Menu icon (three stacked lines “hamburger” icon).
- To perform an advanced search with additional criteria (if not configured to be hidden), click Advanced Search link.

## Advanced Search

A sample responsive Advanced Search desktop view with mobile view inset is shown in the following figure.



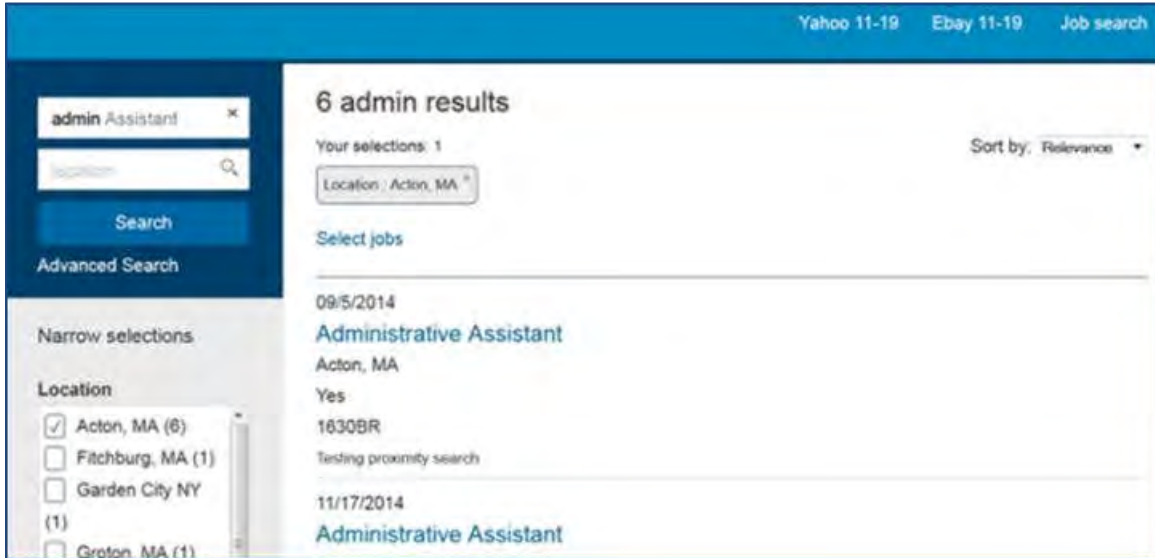
- Select Keywords and Location criteria first.
- Select additional criteria from the desired options, then select Add (beside the Autocomplete text box) to add it to the search criteria.
- To navigate to the previous page, select **Back** link.
- To de-select values, click the X.
- Select Search button when all criteria have been specified/selected.

## Search Results

On the search results page, candidates can perform the following actions:

- Filter the search results further using the faceted filter criteria
- Sort the search results
- Apply for multiple jobs as well as share them with friends (or themselves) via email
- Save the jobs to the job cart so that they can come back later and apply for the saved jobs
- Use new search criteria if the results don't match their interest
- View more jobs that displayed on the screen.

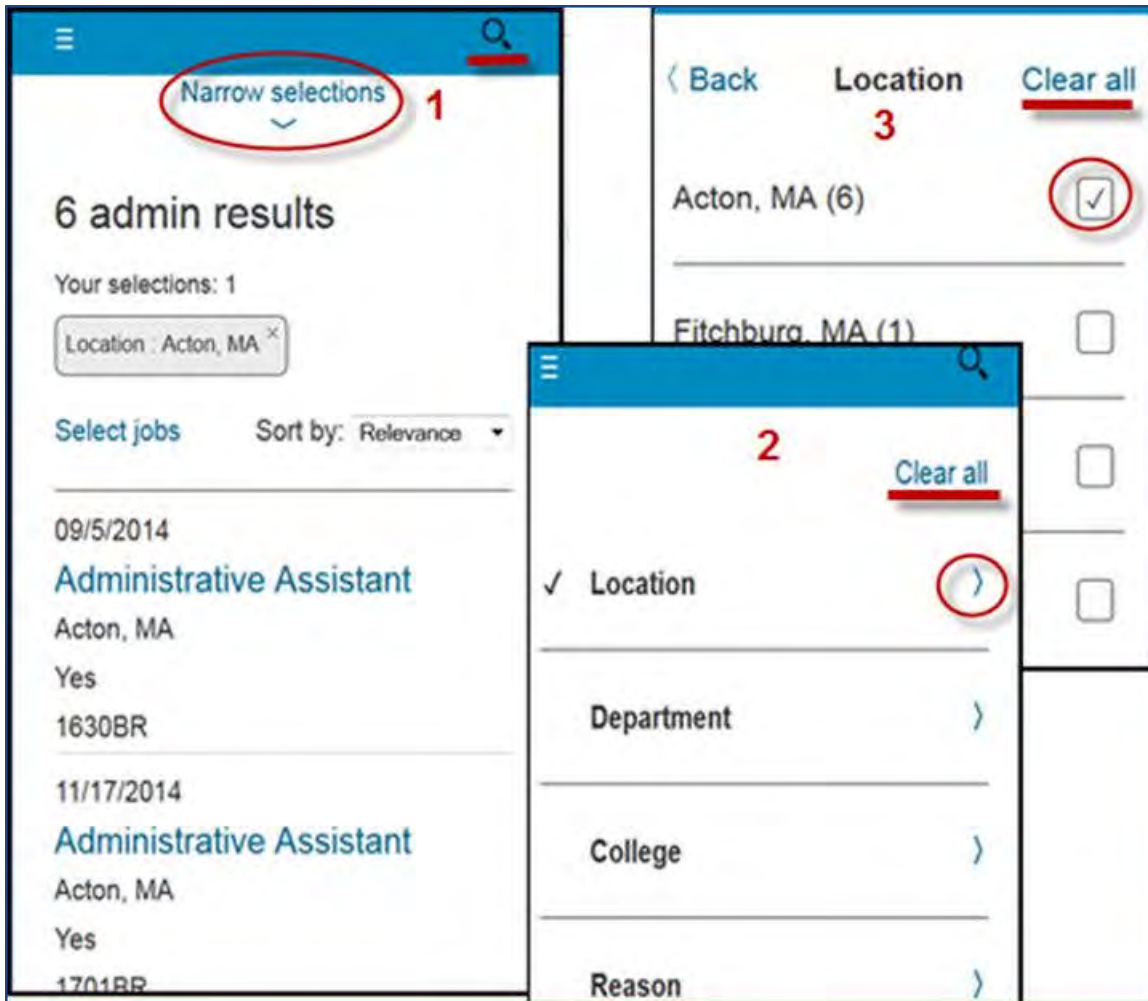
The following shows a sample desktop view of responsive Talent Gateway Search Results. Facet filters are on the left, with Location – “Acton” selected. There are six jobs for Admin search with that location.



- To view the job details, click or tap the job title link in the listing.
- To remove an applied filter, candidates click the x in the corner of the selected filter button (Location: **Acton MA** x in the preceding and following figures).
- Use the **Select Jobs** link to select one or more jobs (via checkbox display) to apply to (**Select jobs** in the preceding and following figures).
- Selecting one or more jobs makes action such as apply, email/share, save, or refer available for selection.
- To sort by distance, relevance, date, or alphabetical options (depending on configuration and whether the candidate entered a location in the location search box), select it from the Sort by drop-down.



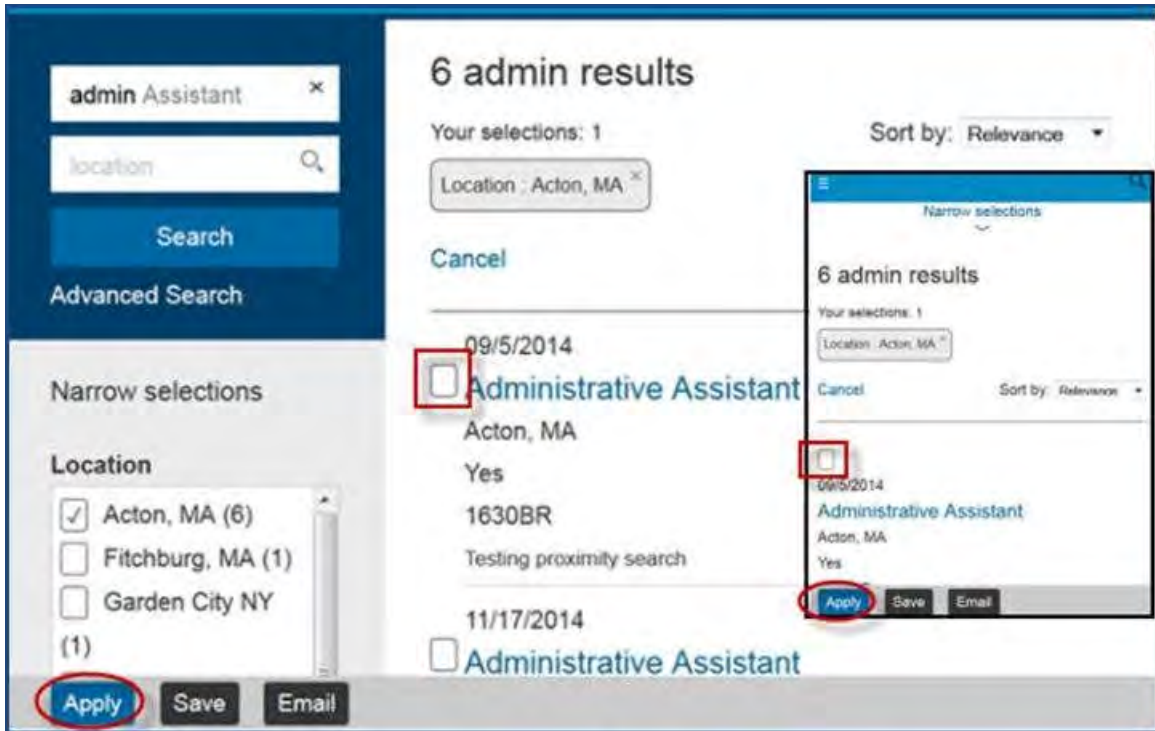
The following figure shows sample responsive Talent Gateway Search results in Mobile view (screen 1). There are 6 jobs for the Admin search results located in Acton.



Candidate can select **Narrow selections** to add or change filters (screen 1), then Location filter (screen 2), then the location value, in this case Acton is selected (screen 3).

- To view the job details, click or tap on the job title.
- To add or change filters in mobile view, candidate opens the facet filter selection: select **Narrow selections** (screen 1).
- To display a filter's options, select its arrow (screen 2).
- Select additional options, or clear and select different options (screen 3).
- To clear all options in all filter facet fields, select **Clear all** (screen 2).  
To clear the options for a selected filter, select **Clear all** on its options list (screen 3)
- To perform a new search, select the Search icon (magnifying glass)

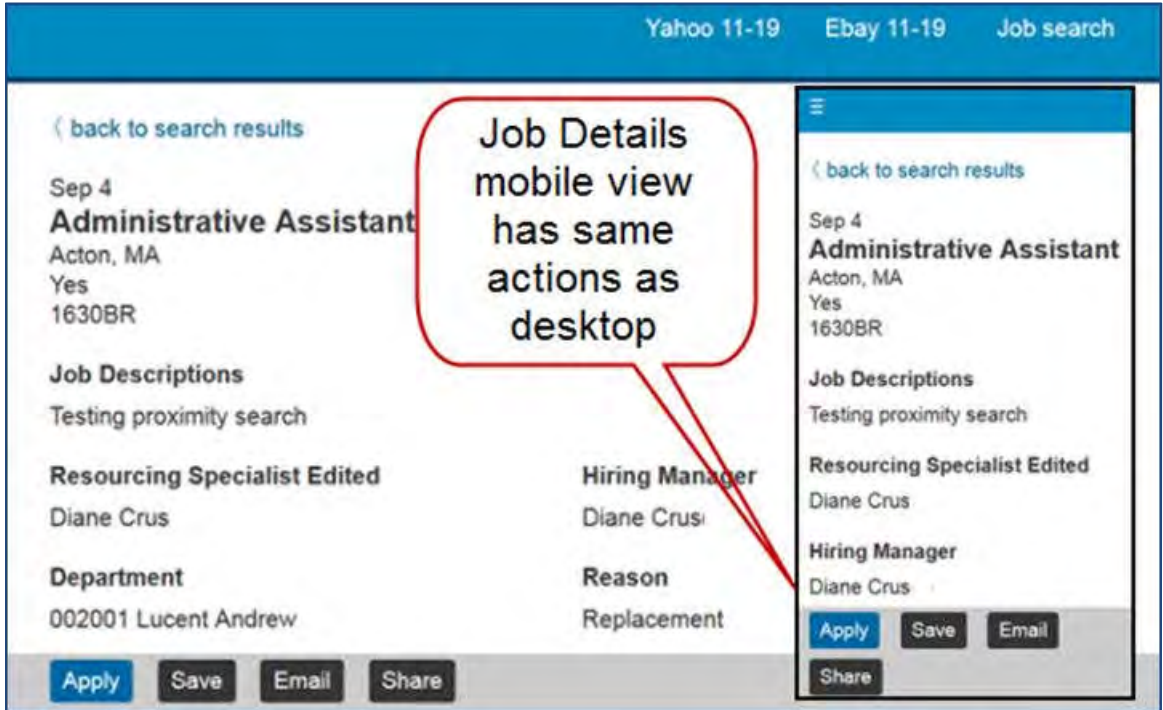
Responsive “Search results” desktop view. Select jobs hyperlink has been clicked. Now you can check the jobs and click Apply, Save (to the job cart), or Email (Send to friend). Steps are the same for the mobile view shown in the inset.



### Job Details

When candidates click or tap a job displayed on the search results page or a highlighted jobs listing, the responsive Job Details page displays the full details of the job. A sample responsive Job Details desktop view with mobile view inset is shown in the following figure.





- Here candidates can check a job thoroughly and Apply to, Save to their job cart, Email to themselves or a friend, Share the job listing by posting to their social networks (Talent Gateway setting “Social media integration – allow post to my social networks for candidates” = Yes).
- Refer action may also be available (Talent Gateway setting "Enable Social Referral" = Yes). It displays the same Referral workflow options that display on the classic Talent Gateway flow, based on the Social Referral configuration settings when the "Send Referral" button is selected from Job details page:



**Post to my network** (Social Referral Configuration setting "Post to my network" is selected in "Referral workflows available")

**Send to my LinkedIn / Facebook contacts** (Social Referral Configuration setting "Send to my contacts" is selected in "Referral workflows available" and LinkedIn or Facebook, respectively, is selected for the setting "Referral Sources Available")

**Send via email** (Social Referral Configuration setting "Send via email" is selected in "Referral workflows available" field)

**Copy referral link** (Social Referral Configuration setting "Copy referral link" is selected in "Referral workflows available" field)

- Two icons of interest that may mark particular jobs include:



– White exclamation mark on purple background indicates a Featured job.



– Black arrow encircled by red “No/Prohibited” symbol indicates that this specific job is not available for referral. For Talent Gateways where Enable Social Referral = Yes, this displays for any req in search results that meets the criteria set in the Talent Gateway’s Referral Available Field Value Mapping setting.

- Social media widgets may also display on this page, following the action buttons, if configured to display (Talent Gateway setting “Social media integration – show share buttons on job details page” = Yes).



## Applying

When candidates select one or more jobs and click either the Apply link or button (for smaller screens), they are directed to the existing TG pages that display when candidates apply via the classic TG search results page.

### Apply button – multi-apply (to Selected jobs page)

**Selected jobs**

- You may apply to any job individually by clicking the “Apply” link next to that job.
- Whenever possible, jobs for which the application process is identical are grouped together.
- You may apply to a group of jobs by clicking on the “Apply to group” link, when available.

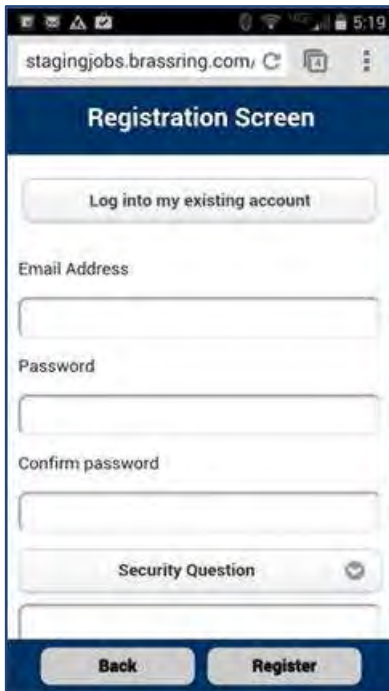
Job Title	Location	Business Group	Date updated	Job type	Apply	Group apply
Entry Level Comp Analyst position	Texas	Human Resources	23-Apr-2014	Salary	<a href="#">Apply</a>	
Job Title	California	Human Resources	04-Feb-2014	Salary	<a href="#">Apply</a>	<a href="#">Apply to group</a>
Program Manager- Test Req	Florida	Community Relations	04-Feb-2014	Salary	<a href="#">Apply</a>	
Entry Level Learning Products Mgr position	California	Human Resources	04-Feb-2014	Salary	<a href="#">Apply</a>	
Manager HRIS Analyst position	California	Human Resources	04-Feb-2014	Hourly	<a href="#">Apply</a>	
Entry Level Consultant position	Florida	Human Resources	04-Feb-2014	Hourly	<a href="#">Apply</a>	<a href="#">Apply to group</a>
Entry Level HRIS Analyst position	Florida	Human Resources	04-Feb-2014	Hourly	<a href="#">Apply</a>	

[Back to search results](#)

- If already logged in, they are taken to the first step in the application process, which is profile creation/source or the Gateway Questionnaire pop-up (if a GQ is attached to the job).
- If not logged in, then the existing Login dialog is displayed, from which they can log in with existing credentials or create a new account.

If the TG details setting “Enable mobile optimization for this gateway” = Yes, and the candidate is on a mobile device (or tablet if **Treat tablets as mobile devices (Full TGs Only)** is checked), then the candidate will be transitioned to the mobile apply screens. Otherwise the desktop apply screens will display.

### Apply button – Login (Mobile device: Mobile apply enabled)



### Limitations and Known Issues

The Internet Explorer browser version IE8 is supported only in native mode, not in compatibility mode.

### How Do Clients Get this Feature?

This feature is controlled by a new Talent Gateway setting and configuration, available only for WCAG-enabled Full and Global Talent Gateways. Please contact our Support Team for more information.

# Configuration Tasks

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This section describes the tasks required to configure this feature. Tasks labeled Workbench Self Service can be performed by certified Workbench Self Service users or by our support staff.

The responsive job search feature can be enabled for Full and Global Talent Gateways that are WCAG compliant, but not for Basic Talent Gateways.

Responsive layout for Talent Gateways is set and configured per gateway in Workbench, with settings for:

- [Header / menu](#)
- [Search openings](#)
- [Advanced search](#)
- [Search results](#) (with filters)
- [Job details](#)

[Branding of responsive pages](#) is controlled via a Visual Branding Tool also launched from within Workbench.



Steps to configure include:

1. Configure responsive layout for Talent Gateway (**Support Staff** – Self-Service users can View layout configuration only)
  - Customize Search Openings text
  - Configure Keyword Search box
  - Configure Location Search box
  - Configure Highlighted jobs
  - Select search fields for keyword search
  - Select search fields and/or proximity for location search
  - Select fields for advanced search
2. Set **Talent Gateway Search Layout** setting to **Responsive**.
3. Synchronize changes with Talent Gateway

## Talent Gateway Responsive Layout – Workbench Self-Service (Tiers 1+)

The Talent Gateway administration page in Workbench (**Tools > Talent Gateways**) has a new column and icons used in configuring responsive job search layout.

In the new **Responsive layout** column:

- Add icon (green +) indicates a responsive layout does not yet exist – click to launch and configure responsive layout.
- Edit icon (pencil) indicates a responsive layout has been saved but is not active – click to edit the responsive layout.
-  Picture icon indicates visual branding is available – click to launch the Visual branding tool.
-  Green checkmark icon indicates settings for Responsive job search layout are configured and the gateway has been activated for responsive search layout. Click to edit the responsive layout.

Gateway type	Locale (default)	Launch	Edit	Text customization	Responsive layout
Full	English - United States				
Full	English - United States				
Full	English - United States				
Full	English - United States				
Global	French - France				

You create and save a responsive layout, in stages if desired, before activating and making it visible to end users via the Talent Gateway **Talent Gateway Search Layout** setting. After configuring your layout, select **Responsive** when you are ready to have candidates see and use it.

### Creating the Responsive Layout

To create or edit a responsive layout, access the Talent Gateway in **Tools > Talent Gateways**.

- To add a responsive layout, click the Add icon (green +) for the desired gateway to launch the Responsive Layout details screen containing all the settings related to the responsive job search layout, with default values.

–OR–

- To edit the settings once a responsive layout has been configured or activated, click the Edit (pencil) or Picture icons, respectively, for the desired gateway. This opens the Responsive Layout details screen containing all the settings related to the responsive job search layout, with already-configured values that you can change.

### Responsive Layout Details Screen

The Responsive Layout details screen has five sections.


Responsive Layout details
▸ <b>Branding: Fonts/Colors/Images</b>
▸ <b>Job search header</b>
▸ <b>Search page</b>
▸ <b>Search results page / Job listing</b>
▸ <b>Job Details</b>

- To expand (or collapse an open section), click anywhere in its blue title rectangle. Only one section remains open at a time (so opening a new one collapses the one previously open).
- You can configure or edit in any order.





Job Search Header section expanded, dotted line shown between the config item number for Job Search Header and the corresponding boxed location indicator number

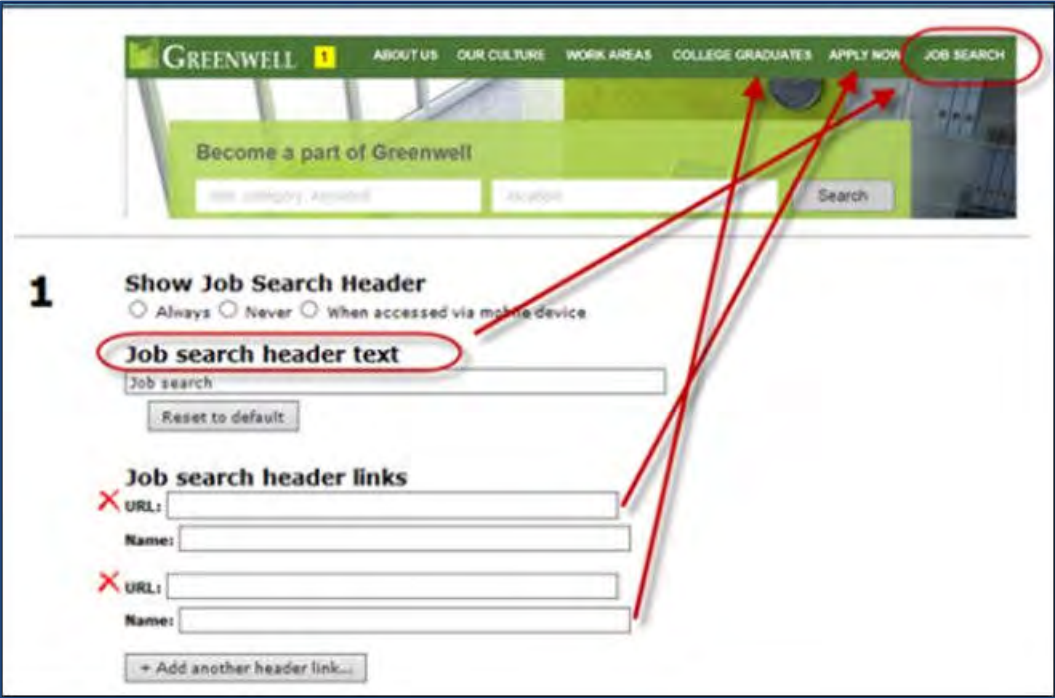
- Within each section, numbered configuration items correspond to numbers (in yellow boxes) shown on a static sample image to illustrate the page feature that you are configuring and its relative placement.
- For text customization:  
If you customize default text, select **Reset to default** if you want to reset custom text to the default text.  
For customization of *Global Talent Gateways*, click the plus icon  to set the text for each member gateway. The default gateway is the first listed, with the remaining members following in alphabetical order. See example for [Search title / job counter text](#).  
For customization of req field labels for advanced search, facet fields, and job details elements, click the **Customize field labels** link. See example for [Advanced search](#).

## Configuring Job Search Header

The following page features are configurable.

### 1 Job search header

- **Show Job Search Header**  
Required: select option of when to display the header. The header is responsive and adjusts *to screen size automatically*. If you choose **When accessed via mobile device**, header displays only when the system detects that the user is accessing the site via a mobile device (or a tablet if the setting “Treat Tablet as a mobile device” is checked in the Talent Gateway settings). On large screens or devices the header is hidden, since the client’s parent page is expected to show its own header.  
Header links stack under the Menu icon (“hamburger” of three stacked lines) on screen sizes less than 768 px.
- **Job search header text**  
For this link, shown in the following figure as **JOB SEARCH** in the header, custom text you enter into the field displays there if the header is configured to display. Default text is “Job search.” Candidates clicking the Job Search link go to the Home screen/landing page.

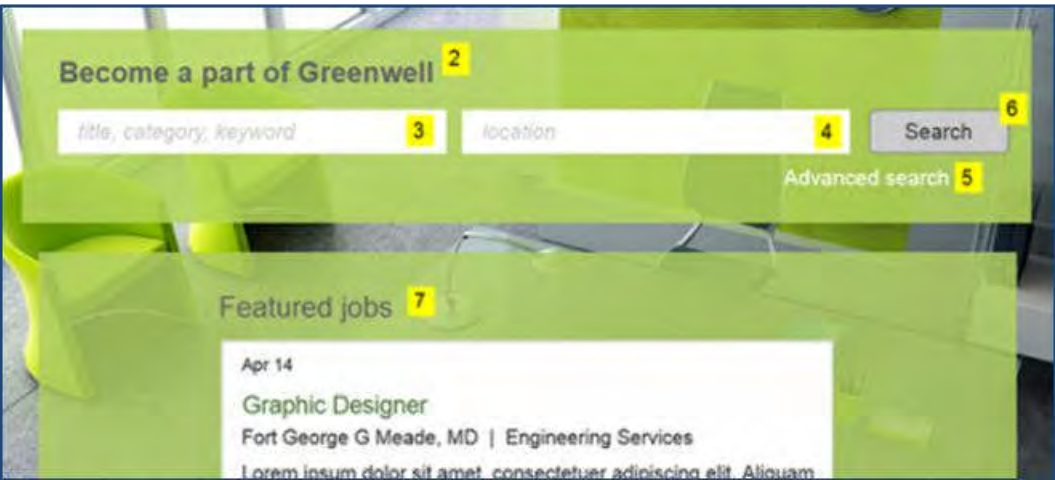


- **Job search header links**

The first time you open this section, no Job search header links display. After adding the Job search header text for that automatic header link, click **Add another header link** to add up to five additional custom links (max total is six), if desired. For each one you add, enter a fully-qualified **URL** (for example, <https://www.company.com/AboutUs.html>) and link **name** (text to display for the link, maximum 75 characters).

**Configuring Search Page**

The following Search page features are configurable.




**2 Search title / job counter text**

- **Search title / job counter text**

Enter desired text if you wish to replace the default text, “Search from over [#jobcount#] opportunities,” where [#jobcount#] is the number of reqs posted to this specific Talent Gateway on the responsive search openings page.



For Global Talent Gateways, click the plus icon  to set the text for each member gateway. The default gateway is the first listed, with the remaining members following in alphabetical order.



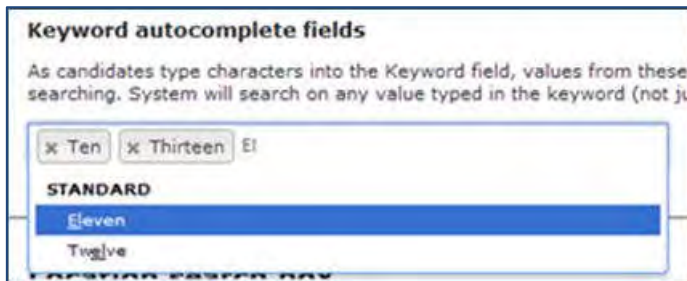
### 3 Keyword search box

- **Keyword search box instructional text**

Enter desired text, to a maximum of 75 characters, if you wish to replace the default text, “title, job, category, keywords.” Text entered here displays within the Keyword search box, and disappears once the candidate starts typing into it.

- **Keyword autocomplete fields**

Optionally, begin typing to select specific fields for which candidates will have an autocomplete feature in the keyword search box, such as Job title, Job group, Division, etc. This displays a dynamically-filtered list of standard and custom req fields, which you select one at a time, up to five. To de-select, click the x shown in the selected field name “button.”



The values from the selected fields are presented as predictive choices as candidates type characters in the Keyword search box, to aid them in searching. However, the system searches on any value typed in the keyword, not just those values predicted.

- To hide the keyword search box (and disable editing of its instructional text), select **Hide keyword search box**. (The search box is otherwise displayed by default, which is a best practice.) If hidden, candidates will not be able to search for jobs using keywords, Job title, skills, etc.

### 4 Location search box

Location hierarchy order is:

- a) Proximity search
- b) Location requisition fields

The Talent Gateway displays the highest selected Location type possible in this hierarchy. If a or b isn't selected, the value typed in the Location text field searches against all fields displayed in Job Details.

- **Location search box instructional text**

Enter desired text, to a maximum of 75 characters, if you wish to replace the default text, “location.” Text entered here displays within the Location search box, and disappears once the candidate starts typing into it.

- **Proximity Search**

Checking proximity search allows candidates to use the “Jobs near me” feature. (The “Jobs near me” on Search openings page is hard-coded for jobs within a 50-mile radius of location figured by GPS co-

ordinates, so the number of miles selected here is not reflected in the highlighted jobs on the Search openings page, but on the Search results page.)

How the autocomplete location field displays the options depends on what setting is configured in Client settings for Proximity, and this setting is the same as the proximity setting for Talent Gateways on the Talent Gateways details page. For candidates, if the initial values typed are alpha characters, the autocomplete values are **City, State, Country**. If the initial values typed are numeric characters, the autocomplete values will display the **zip codes** only. When it is enabled/disabled, or you change the mileage or the miles to kilometers in one screen, the change is reflected on the other screen. Proximity search will be the top location search criterion and will ignore other Location search configuration if Proximity is enabled.

- **Location requisition fields**

Configure the requisition fields for location search criterion autocomplete, such as City and State. If Proximity search is not configured for a full Talent Gateway, then it is required to configure Location requisition fields. To select specific fields for which candidates will have an autocomplete feature in the location search box, begin typing. This displays a dynamically-filtered list of standard and custom req fields, which you select one at a time, up to five. To de-select, click the x shown in the selected field name “button.” The values from the selected fields are presented to candidates as predictive choices to aid in searching. System will only search within the fields selected.

- To hide the location search box (and disable editing of its instructional text), select **Hide Location search box**. (Advanced search option is otherwise displayed by default.) If hidden, candidates will not be able to search for jobs by location. Checkbox is disabled if “Hide keyword search box” and “Hide advanced search” settings are both checked.

## 5 Advanced search

Advanced search allows candidates to search with broader search criteria to get the jobs that suit their needs. Advanced searches can be performed from the Search page as well as Search results page.

- **Advanced search hyperlink text**

Enter desired text, to a maximum of 75 characters, if you wish to replace the default text, “Advanced Search.”

- **Advanced search fields**

When candidates select the Advanced Search link, fields you select here display in advanced search in the order you have selected them. Begin typing to display req standard and custom fields to be selected, and choose up to 12. If any of the same fields have been inherited or selected by default, remove them (otherwise they will appear as duplicates). Selected fields should also be selected in Job Details.

- **Customize field labels**

Click this link to list the fields currently selected anywhere in the responsive layout for the gateway. Enter desired custom labels; they will be consistent across areas. They are saved when you save the responsive layout.

Custom field labels for Talent Gateway				
Field name	REQUISITION field label	Field type	Field selected in Talent Gateway area(s)	Custom field label for this Talent Gateway
AutoReqId	AutoReq (custom label) ID	text	Advanced search Search results - position 1	<input type="text"/>
Title	Job Title (custom label)	text	Advanced search Search results - job title Job details - section 2	<input type="text"/>

- To hide the advanced search box (and disable editing of its instructional text), select **Hide advanced search**. If hidden, candidates will not be able to use advanced search. Checkbox is disabled if “Hide keyword search box” and “Hide location search box” settings are both checked.

## 6 Search button text

- **Search button text**

Enter desired text, to a maximum of 75 characters, if you wish to relabel the Search action button on the

responsive job search page. Default button label text is “Search.” Button color is configured in the Visual Branding Tool.

## **7 Highlighted Jobs**

The Highlighted Jobs section determines which jobs – based on being near the candidate (Jobs near me), being featured by the person posting the job, or being most recently posted (Most recent jobs) – will display on the responsive search openings page (this replaces the classic Featured jobs section).

The hierarchy for *type* of Highlighted jobs:

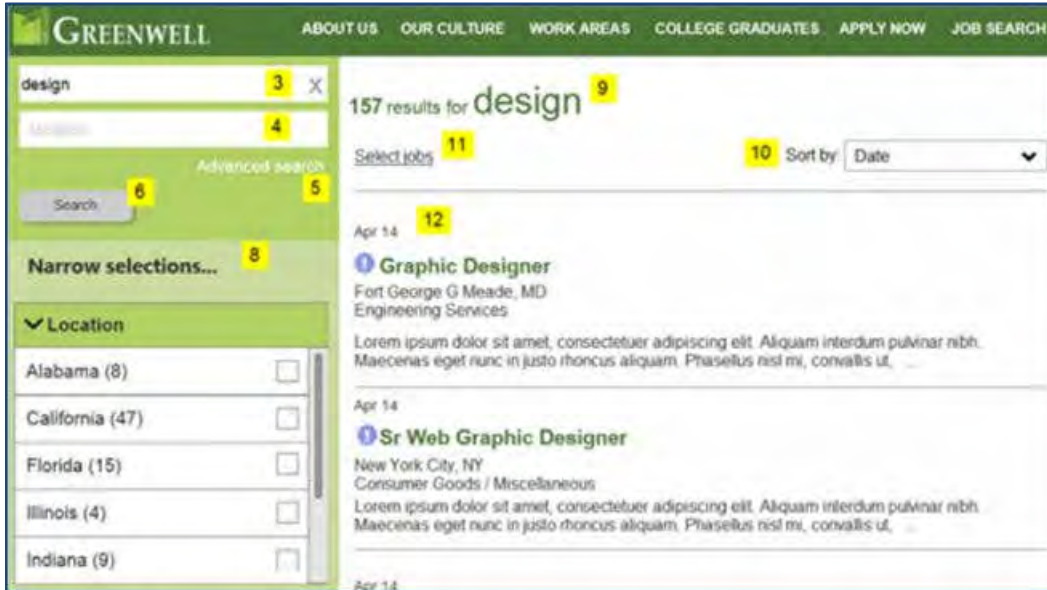
1. Hide Highlighted jobs
2. Jobs near me
3. Featured jobs
4. Most recent jobs

The Talent Gateway displays the highest selected type possible in this hierarchy. If type 2, 3, or 4 cannot be displayed (or isn't selected), the Highlighted jobs section is hidden on the initial search screen.

- **Jobs near me**  
Select to display 10 jobs that are nearest the candidate, based on the longitude and latitude values from the candidate's browser or mobile GPS. Additionally, proximity searching must be enabled for the gateway (section 4), the candidate's browser Share location setting must be enabled, and candidate must allow sharing of location with BrassRing when presented with the option upon reaching the search openings page. If the candidate does *not* allow, then the next selected Highlighted jobs type in the hierarchy displays (Featured jobs or Most recent jobs).  
Enter up to 75 characters in the Jobs near me box to customize the text; default text is “Jobs near me.”
- **Featured jobs**  
Select to display the jobs that are selected to be featured jobs when the req is posted. Only 10 display on this page.  
Enter up to 75 characters in the Featured jobs box to customize the text; default text is “Featured jobs.”
- **Most recent jobs**  
Select to display the 10 jobs that have been most recently posted or updated to the Talent Gateway.  
Enter up to 75 characters in the Most recent jobs posted box to customize the text; default text is “Most recent jobs posted.”
- **Hide highlighted jobs sections**  
Select if you want no jobs displayed in the highlighted jobs section on the initial responsive search openings page. For Global Talent Gateways

## **Configuring Search Results Page / Job Listings**

The following Search Results Page / Job Listings page features are configurable.



## 8 Filter / facet fields

Narrow selections is the configurable section users use to further filter their search results.

- **Filter results label text**  
Enter desired text, to a maximum of 75 characters, if you wish to replace the default text, “Narrow selections.”
- **Filter / facet fields (up to 4)**  
Required: Select up to four req standard and custom fields that are mapped to the search engine to display in facet filter section of the Search results page. It’s recommended that you choose fields with fewer than 20 options for a better user experience. Selected fields are displayed to candidates in the order selected – drag and drop to re-order them. You cannot use proximity search or a Location that is a concatenation of multiple req fields. Location for faced filtering can be *one* field per facet. However, multiple Location fields can make up multiple Facets (for example, req Country field and req State field can be two of the four facets if a client chooses).
- **Customize fields labels**  
Click to customize the field labels that display. See example for [Advanced search](#).

## 9 Search results text

- **Search results text**  
Enter desired text, to a maximum of 75 characters, if you wish to replace the default text where [#searchresults#] represents the number of matches for search criteria, and [#searchcriteria#] token is replaced by the criteria used in keyword or location search. For example, if the candidate searches for Software Developer jobs in Waltham and the system finds 150 software developer jobs open in Waltham, then the text with the results job counter displays as “150 Software Developer, Waltham results.”
- **Filters applied text**  
Enter desired text, to a maximum of 75 characters, if you wish to replace the default text where [#filternumber#] token is the number of filters candidate applied on the search results page, for screens of width 1024 and 1280 pixels. For example, if two filters are selected by the candidate, then the text will be displayed as “Your selections: 2.”

## 10 Search Results Sort text label

- **Search Results Sort text label**  
Enter desired text, to a maximum of 75 characters, if you wish to replace the default text for the sorting option dropdown, “Sort by:”

A maximum of four options will be available, defaulted in the following order: **Distance, Relevance, Date, Alphabetical**.

- If the gateway *does not* have Proximity enabled, Distance is not an option.
- If the gateway *does* have Proximity enabled:
  - AND the candidate enters search criteria in the location field that is proximity-based, then Distance is defaulted based on location criteria.
  - AND the candidate acknowledges to share their location AND there is no location criteria entered, then Distance is defaulted based on the candidate location.
  - AND the candidate disallows sharing of their location but *enters* search criteria in the location field that is proximity-based, then Distance is defaulted based on location criteria.
  - AND the candidate disallows sharing of their location and *does not enter* search criteria in the location field that is proximity-based, then Distance is not a sort value and Relevance is defaulted.
- For Relevance sort, the secondary sort is Distance (if available), or Date if Distance is not available.
- For Date sort (which sorts by Date Updated), the secondary sort is Distance (if available) or Relevance if Distance is not available.
- For Alphabetical sort (which sort the results alphabetically by what is stored in the Job Title setting), the secondary sort is Distance (if available), or Date if Distance is not available.

### **11 Select jobs text**

- **Select jobs text**  
Enter desired text, to a maximum of 75 characters, if you wish to replace the default text for this link, “Select jobs.” For candidates, clicking the link displays checkboxes to the left of each job listed. They can select multiple jobs and then select one of the action buttons configured to display (such as Apply, Share, or Save) from the floating action bar.

### **12 Search results / Job listings FIELDS**

**Search results / Job listings FIELDS** allows you to configure how the jobs are displayed, such as what can be displayed above and below the Job Title. You choose which search-mapped req standard or custom fields (no field labels) to display in each position of job listings displayed on the job listing search results.

- **Position 1**  
–OR–  
**Date updated**  
For the first field to be displayed in a job listing, optionally select Date updated or a field such as AutoreqID, Division, Job category, etc. This field will appear above the Job title field in the job listing in a smaller, non-bolded font, with no label.
- **Job Title**  
Required that you select this prominent field in the job listing; it is recommended that you use the Job title field (default).
- **Position 3**  
Optionally select up to 3 fields that are most important about the job, such as division, group, location, job type, work shift, etc. . Each displays in the order selected following the job title field, on its own line, regardless of the screen size. It’s recommended that you select only one or two fields, such as Location, Division, Department, Job Category.
- **Summary / Description**  
Required that you select this field summarizing the job in the listing; it is recommended that you use the Job description field (default). The first two lines of characters will be displayed (depending on screen size), followed by “[...]” It’s recommended that you choose a text area field from the requisition that quickly promotes the position to encourage the candidate to view Job Details.



### 13 Show more... results

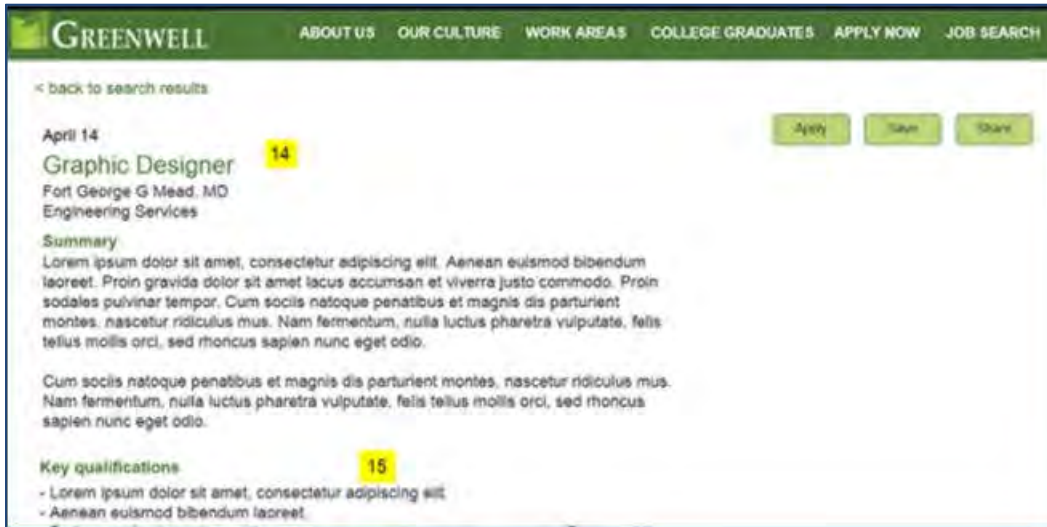
A maximum of 50 jobs are displayed at a time. If there are more than 50 results to be displayed, the system displays this link after the search results list. Candidates click to display the next 50 results.

- **Show more... results**

Enter desired text, to a maximum of 75 characters, if you wish to replace the default text, “ Next>”

### Configuring Job Details

The following Job Details page features are configurable.



### 14 Job Details fields – Section 1

Best design practice is use the same selections as for **Search results / Job listings FIELDS**. The settings are linked by default, but can be unlinked if there is a compelling need to do so.

- **Job Details fields – Section 1**

- **LINK the Position 1, Job Title, Position 3 and Summary / Description fields from the Search results / Job listing FIELDS (recommended)**

Leave checked for consistent display. If changing, refer to Search results / Job listings FIELDS for additional information on selecting values for **Position 1** or **Date updated, Job Title, Position 3, Summary / Description**.

### 15 Job Details fields – Section 2

In this section you can add fields to display for Job details following those selected in section 1. Best design is to include all fields selected for Facet filters, Advanced Search, and Search results. You should also keep text area fields together, and separately keep other non-text area fields together. Fields selected in Talent Gateway Job details are inherited.

The table in section 2 shows req fields that are mapped to the search engine and selected to display in the Talent Gateway, their display labels, field type, and the customized label (that will be displayed on the responsive job search, search results, job details pages for the Talent Gateway). For GTGs, a separate text field will be available for each of the member TGs. To remove a field from the job details display, click its Delete icon ( red X).

# 15

## Job Details fields - Section 2

### Display rules:

Text area field labels will be displayed as section headers with the values beneath taking the available width of the screen. All other field types will be displayed with labels ABOVE the values in a regular font and values BELOW in a **bolder** font. They will display in 2 columns in larger screen formats and in 1 column in smaller or portrait screen formats.

NOTE: Fields selected in Talent Gateway details have been default, but can be changed.

	Field name	REQUISITION field label	Field type	Custom field label for Talent Gateways <a href="#">Customize fields labels</a>
+	✗ College	College Edited	radio	College
+	✗ DateM	Date Multi	date	
+	✗ Position	Reason for Position Opening Edited	radio	
+	✗ Location/Division	Work Location Edited	select	Work Locaiton
+	✗ Requisition Notes	Requisition Notes	textarea	

+ Select field... +

- **Customize field labels**  
Click to customize the field labels that display. See example for [Advanced search](#).
- **Select field**  
Select fields by typing into the text box. You can customize the field label in the empty box to the right. Click the plus sign to add the field to the blue grid. You can drag and drop the fields to display in different locations, or click the red 'X' to remove the field.  
Custom fields labels open a pop-up where you can configure these fields.

## Global Talent Gateways

Global Talent Gateways' optional fields are indicated by a plus sign. Click to display a field for each member, which can be configured individually. (The plus sign turns into a minus sign when opened; click the minus sign to collapse.)



Responsive Layout details

## 1 Show Job Search Header

Always
  Never
  When accessed via mobile device

### Job search header text

FDC English 2 [English - United States]

DC French2 [French (France) - France]

DC German2 [German - Germany]

DC Italian2 [Italian - Italy]

### Job search header links

FDC English 2 [English - United States]

DC French2 [French (France) - France]

DC German2 [German - Germany]

DC Italian2 [Italian - Italy]

FDC English 2 [English - United States]

FDC English 2 [English - United States]

When you create a Global Talent Gateway (GTG), the member gateways can be either responsive or classic. If the default member Talent Gateway of the GTG is responsive, then:

- Layout configuration settings (Hide keywords, location fields, advanced search fields, etc.) are copied from the default member to the GTG (and to all other members). Basically, a draft layout configuration is automatically created for the GTG.
- For any existing member that was previously responsive, the configuration settings are overwritten by the default member.
- Master setting (TG Layout:Classic vs responsive) for the member is switched back to "Classic".
- Text customization settings of the individual "responsive" member Talent Gateways are copied (and include the default in this case).
- Any Responsive Text customizations are retained when members are rolled into a new GTG.
- To make the layout configuration active, the user must enable the master setting (Classic vs responsive) in the GTG admin page.

If the Default member TG is *not* responsive, but there is another member TG that is responsive, then:

- No draft layout created as the default member is NOT responsive.
- Existing responsive TG members keep all the configuration and text customization settings.
- User must review configurations for continuity and check that the current text customizations make sense.
- To make the layout configuration active, the user must enable the master setting (Classic vs responsive) in the GTG admin page.

## Job Action Buttons

On the Job Details page, best practice is to display only four of the possible five buttons. The following shows the settings/configuration for the recommended action button combinations.

### Apply Save Share Email buttons

- Disable job cart = unchecked (allows Save)
- Social media integration – allow post to my social networks for candidates = Yes (allows Share)
- Social media integration – show share buttons on job details page = No (disallows social widget buttons)
- Enable Social referral = No (disallows 'Refer' and buttons shows 'Apply')
- Disable send to a friend = unchecked (allows Email)

### Apply Save Refer Email buttons

- Disable job cart = unchecked (allows Save)
- Social media integration – allow post to my social networks for candidates = No (disallows Share)
- Social media integration – show share buttons on job details page = No (disallows social widget buttons)
- Enable Social referral = Yes (allows Refer)
- Disable send to a friend = unchecked (allows Email)

### Apply Save Email buttons with Social Media Widget buttons



- Disable job cart = unchecked (allows Save)
- Social media integration – allow post to my social networks for candidates = No (disallows Share)
- Social media integration – show share buttons on job details page = Yes (allows social widget buttons)
- Enable Social referral = No (disallows Refer)
- Disable send to a friend = unchecked (allows Email)

## Setting Talent Gateway Search Layout

1. When you are finished configuring all the sections of the new pages, save the configuration (click **Save**). (**Revert to Saved** will remove any changes you have made and return the options previously saved. **Cancel** cancels and nothing changes from last save.)

If this is the first time a Responsive layout is saved for the TG, the icon changes from Add (plus sign) to Edit (pencil). If a Responsive layout was saved previously, it remains in Edit mode until you activate the responsive layout.

2. To activate the responsive layout, select the Edit [selected TG] setting, changing the new **Talent Gateway Search Layout** setting to **Responsive**.

**Workbench > Tools > Talent Gateways > Edit [selected TG] > Talent Gateway Search Layout**

Options are:

**Responsive** – activates the new responsive search pages and functionality.

**Classic** (default) – leaves the Talent Gateway searching functionality in its current mode.

After you save the value as **Responsive**, the Edit icon changes to the Active green checkmark icon.


3. You should synchronize the TG for all changes to take effect. Gateways are automatically synchronized periodically, but doing manually completes the synchronization faster (which is helpful if you intend to apply branding).
4. Add visual branding to the layout to customize the look.

## Visual Branding Tool (Self-Service Tiers 1+)

You use the Visual Branding Tool (VBT) to change and save branding elements for the Talent Gateway: colors, fonts, and stored images. Gateways must be:

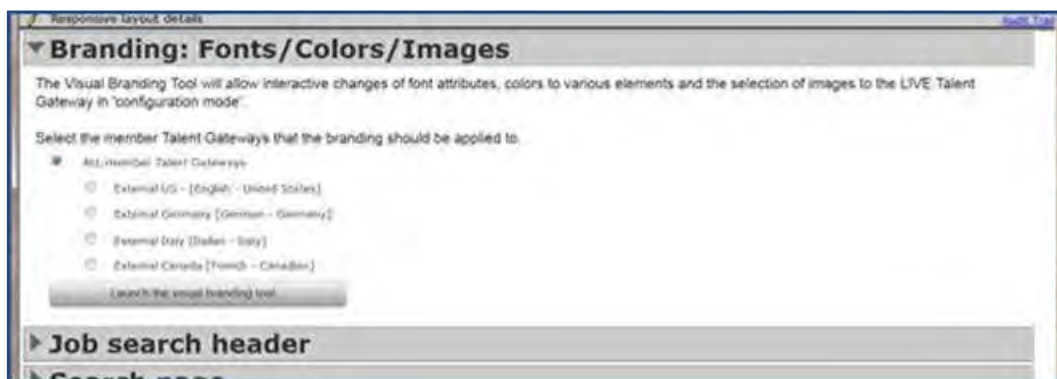
- Full or Global WCAG-enabled Talent Gateways
- Have saved responsive layout (indicated by pencil or checkmark icons)
- Be synchronized if new or if responsive layout was just recently configured.

Launch the tool directly from the Talent Gateway Administration page by selecting:

- **Tools > Talent Gateways >**  [picture icon in Responsive layout column for any gateway]

This launches the VBT in a configuration mode, where you can right-click to change the different elements. This allows direct access to the tool without having to launch the responsive layout details screen. This method allows you to select individual full or member gateways. However, selecting a Global TG launches configuration for the default member gateway. When you save, your changes will save to *all* members.

- Alternatively, you can click the edit responsive layout icons (pencil or checkmark) for any Talent Gateway, full, member or global. When you expand the **Branding: Fonts/Colors/Images** section for a Global TG, you can then choose all, one, or multiple member gateways for configuration.



This method allows you to select individual full or member gateways. Selecting a Global TG launches configuration for the default member gateway. When you save, your changes save to *all* members.

Navigation within VBT follows the same course as if you were on the live Talent Gateway. In order to see job search results, you'll need to have some jobs posted to the Talent Gateway, then navigate through Search openings > Search. In VBT you can changes only pages with responsive layout, currently: Search Openings, Advanced Search, Search Results (and related filtering screens) and Job Details. If you navigate to a classic page or screen, a message warns you that you are leaving the VBT area.

## Configuring Branding

Configuration mode for the TG displays configurable text, selected colors, and uploaded images. The default colors and color palette for unbranded gateways uses any configured mobile site color settings, uploaded mobile logo, or Talent Suite site colors. If no mobile site colors are configured, the initial color palette is derived from the Primary Header Logo image.



## IMPORTANT

**Primary Header Logo image** should be uploaded *first* for TGs without one. Client Service representative must obtain image from client, and enter a ticket\* for Configuration Engineering to upload it, as well as **Tag Line / Secondary logo** image and **Background** image.

If **multiple TGs or all TGs** need images, explicitly request that CE upload them *simultaneously* for all desired TGS, since graphics uploaded to one TG are not accessible in the VBT from another TG (each TG has its own folder directory that VBT looks in.)

\*Ticket details: Type = Maintenance – Standard; Assigned To = Queue – 2xB CE; Product = 2xBrassRing; Status = Open; Priority = 3 Wanted; Severity = Maintenance – Standard; Category = Gateway – Full; Subcategory = Other

Labeling, instructional text, and action buttons let you know this display is for the VBT.

- A right-click on any of the graphical property areas shows a list of values that can be configured in that area. For the three graphics areas, that list is derived 1) from client and mobile logos in the Talent Gateway Details, and 2) from images stored in the specific TG file directory that Configuration Engineering has loaded previously.  
For text, properties to change the text attributes of base font family, base font size, base font color are listed.
- **Save** or **Cancel** changes using those buttons in the VBT window's header. Changes saved in the VBT are not immediately synchronized (you must manually synchronize or wait for automatic synchronization before changes appear on actual TG).
- Dotted outline appears as image placeholder, to show where uploaded images will go.



## Default Colors and Color hex# Input

When color is configurable (for font, background, foreground, etc), default colors are presented in the open text for user input. The default color is dependent on the dominant colors in the Primary Header Logo image, which determines: Foreground, Links, and Header Links colors.

To change a color:

1. Right-click the configurable setting area.
2. Left-click on the attribute (e.g., Base Font Color).
3. Enter any hex color code in the last text box on the right-click list. Type ahead for color words is also available (black, white, ecru, red, magenta, lightblue, lightgreen, and so on). Hex codes must begin with the required hash tag #, contain no spaces, and have six characters following the #, for example, #FFFFFF. Hit the Enter key to confirm your selection. If you enter an invalid value, the color does not change from the previous color (no error message displays).

## Best Practice Recommendations

Use good design principles and accessibility guidelines when choosing the color palette for your Talent Gateway site. Color choices can result in cases where the font color and the color that is behind the text are too close in color range and therefore not accessible for color-impaired viewers. The system attempts to guard against font colors that do not contrast enough with the color that it is behind it. For example, Foreground Font Color, Foreground Link Color and Button Font Color (all non-configurable) default to the Base Font Color, but if that is too close to the background color of that element (foreground color or button background color), then these font colors automatically switch to use [page] Background Color. However, not all scenarios can be resolved programmatically; in the preceding example, the system cannot resolve the contrast issue if the user has

chosen a Foreground Color or Button Background Color that is too close to both Base Font Color and [page] Background Color.

### Primary Header Logo, Tag line or Secondary Logo, Background image

The following figures show the configurable items for Header Main Logo, Tag Line or Secondary Logo, and Background Image.

#### Primary Header Logo



#### Right-click shows:

- Images already uploaded via CE
- Images uploaded through Workbench Talent Gateway Details for selected TG or Global TG member (Client Logo and/or Mobile Logo).
- Text box allowing user to enter a secure URL where the desired client logo (gif, jpg, jpeg, png) exists and is not behind firewall.

**Recommended:** Size < 50k | Height 50px | Width 130px | Aspect Ratio Width:Height < 6:1 if no secondary or tag line, otherwise < 3:1.

#### Tag line or Secondary Logo



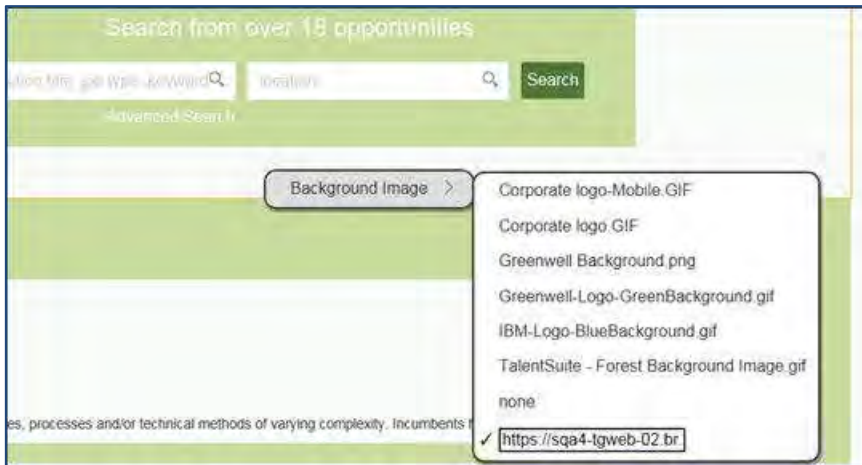
#### Right-click shows:

- Images already uploaded via CE
- Images uploaded through Workbench Talent Gateway Details for selected TG or Global TG member (Client Logo and/or Mobile Logo).
- Text box allowing user to enter a secure URL where the desired client logo (gif, jpg, jpeg, png) exists and is not behind firewall.

**Recommended:** Size < 25k | Height\_25px | Width 50px



## Background Image



### Background Image right-click shows:

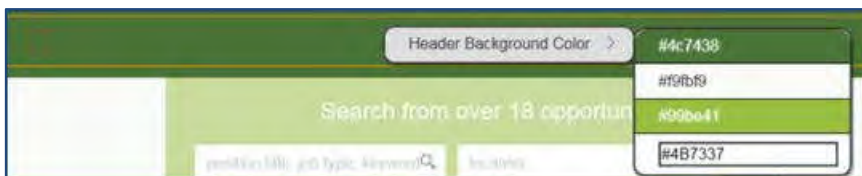
- configuration options for Background image (images already uploaded via CE or Workbench Talent Gateway Details for selected TG, text box allowing user to enter a secure URL that is not behind firewall)

**Recommended:** Size < 175k | Height = 400px | Width = 1100px.

## Header Background Color and Header Link Color

For Header Background Color and Header Link Color, color palette is derived from header main logo colors.

### Header Background Color



**Header Background Color** is configurable and defaults to 1) TG site color for Mobile Header, or 2) #FFFFFF, or 3) #0088BF ■

### Header Link Color

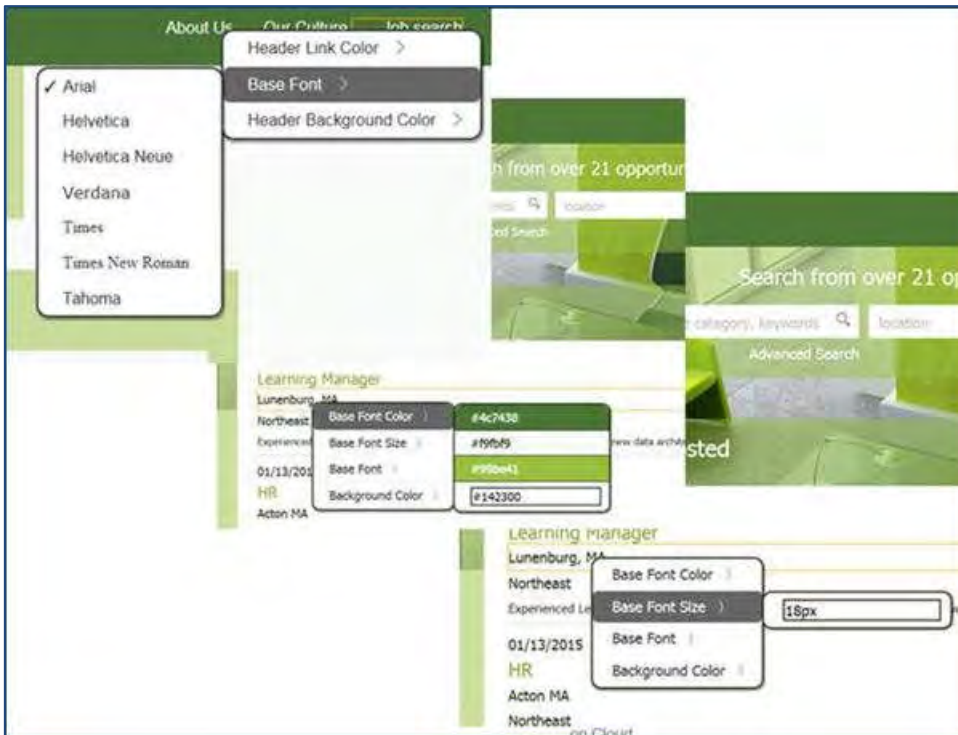


**Header text and link color** is configurable and defaults to 1) TG site color for Mobile Header text, or 2) primary logo's dominant dark color, or 3) #FFFFFF.

## Base Font, Base Font Color, Base Font Size

Base font color is the color of most text throughout the responsive pages.

## Base Font, Base Font Color, Base Font Size

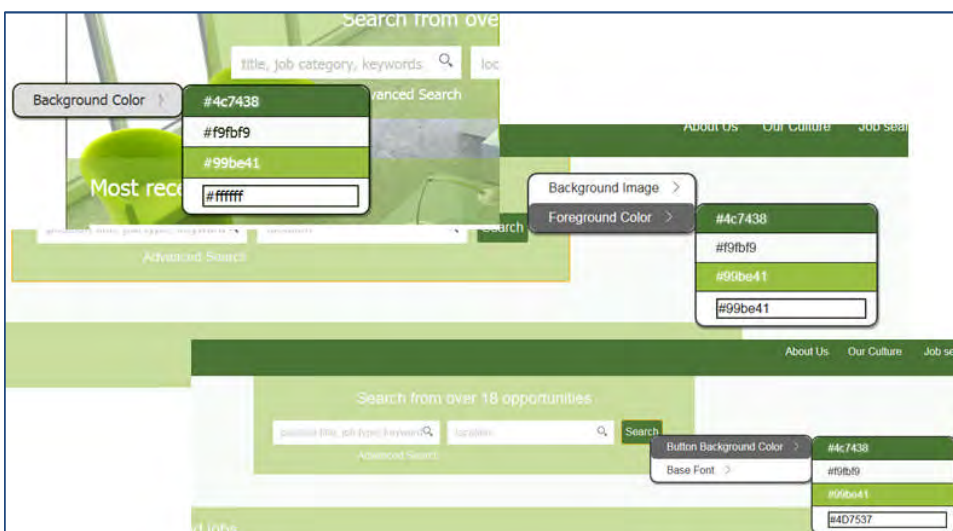


**Base Font** is configurable and defaults to 1) Talent Gateway details: Font or 2) Helvetica Neue/Ariel.

**Base Font Color** is configurable and defaults to 1) Talent Gateway site colors: Mobile main text, or 2) Font label color, or 3) # 333333 (black).


**Base Font Size** is configurable and defaults to 16 px, with options ranging from 8 ps to 20 px. Some font sizes intentionally vary relative to the base font size in certain places. For example: the Job Title will be a percentage larger than the Base Font size of the responsive pages.


## Background Color, Foreground Color, Button Background Color




**Background Color** is configurable and options are accessed with right-click in the left/right margins and between the search box or the Highlighted jobs area. It defaults to 1) Mobile Background color or 2) # FFFFFFF.



**Foreground Color** appears behind the search keyword and location fields on the search openings page, as well as on Search drop- down (on smaller format screens) and search area (on large format screens) on Search results and screens. It is configurable and defaults to 1) TG site color: Dominant Dark, or 2) Primary Logo: dominant color, or 3) # **003F69** .

**Button Background Color** is the color of active buttons on the responsive site pages. It is configurable and defaults to 1) TG site color: Mobile Action, or 2) Primary logo secondary color, or 3) #**0067A2** .

### Additional Configurable Colors

**Link Color** is color of linked text (other than that appearing on a foreground color). It is configurable and defaults to 1) Talent Gateway site colors: Mobile Top Action. or 2) Primary Logo: dominant color, or 3) hex# 00648D .

### Non-configurable Colors

The following colors are not directly configurable.

**Button Font Color** is the color of text on active buttons on the responsive site pages. The system initially uses the Base Font Color, but if too close contrast-wise with the Button Background Color, then it uses same color as Background Color.

**Foreground Font Color** is color of label text that precedes the keyword and location fields. The system initially uses the Base Font Color, but if too close contrast-wise with the Foreground Color, then it uses same color as Background Color.

**Foreground Link Color** is color of any links that are on foreground colors. For search openings and other quick search criteria areas, this is the Advanced search link. The system initially uses the Base Font Color, but if too close contrast-wise with the Foreground Color, then it uses same color as Background Color.

**Accent Background Color** is the color of accent backgrounds (highlighted jobs, search results filters (large formats), applied filters background, etc.). The system blends the Background Color with a tint of the Base Font Color.

## Examples: Visual Mapping of VBT Elements to User Interface

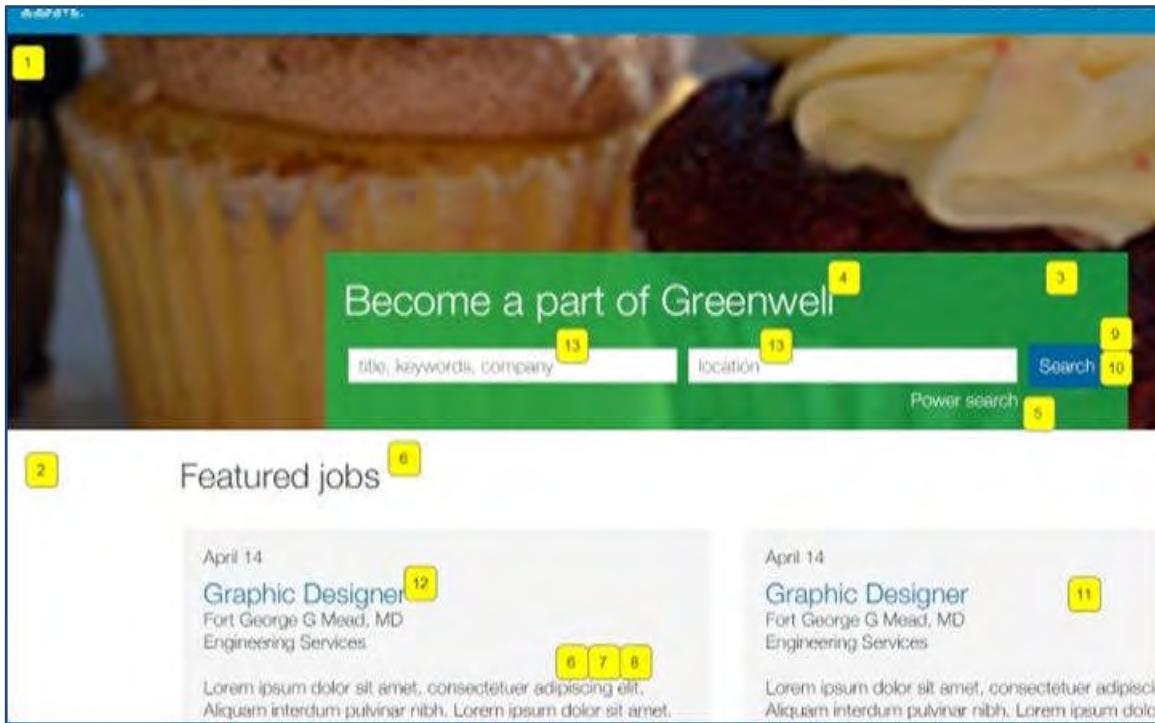
The following examples show the user interface with indicator numbers corresponding to the VBT elements that determine their appearance.

### Header Elements



#	Property	Controlled by	Notes
1	Header Background Color	Header background	
2	Main Header Logo	Primary Header Logo Image	Will be resized with the screen size
3	Tag line or Secondary header logo	Tag line or Secondary Header Logo Image	Will disappear at around 768 breakpoint
4	Menu text color	Header Link Color	Job Search, custom links, Hamburger Or 'menu link color'

## Search Openings

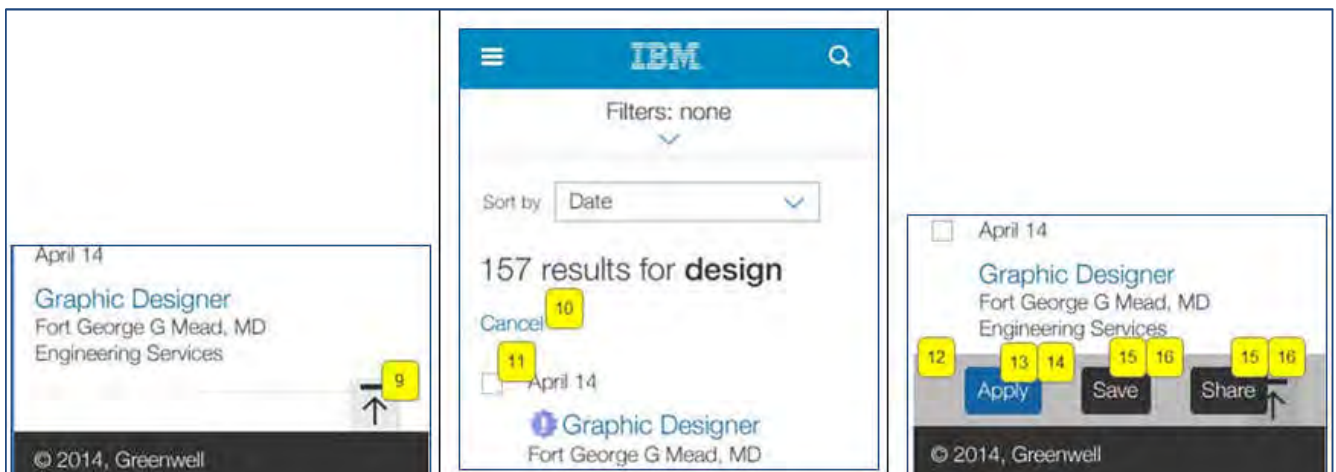


#	Element	Controlled by	Notes
1	Background image (s)	Background Image	Will resize with screen size
2	Background color	Background Color	Should not change search box text field background
3	Foreground color	Foreground Color	
4	Foreground text color	Foreground Font Color	Not directly configurable by user
5	Foreground link color	Foreground Font Color	
6	Base text color	Base Font Color	
7	Base text font style	Base Font Family	
8	Base text font size	Base Font Size	Guardrails of not less than 10px and not more than 20px
9	Button color	Button Background Color	
10	Button text	Button Font Color	
11	Highlighted jobs background color	Accent background color	
12	Job Title	Link Color	Slightly larger font size than base font size
13	Instructional text	Base Font Color	Lighter version of 4.10 Base Font Color

## Search Results



#	Element	Controlled by	Notes
1	Background color	Background color	Should not change search box text field background
2	Search icon color	Header link color	
3	Narrow selection	Base Font Color	
4	Carrot/Arrow indicator	Link color	
5	Sort by label text color	Base Font Color	
6	Sort by selection choices	Base Font Color	
7	Search results text	Base Font Color	Text is larger than Base Font size (even larger than the Job Title font size) Search criteria is bolded
8	Select jobs custom text	Base Font Color	

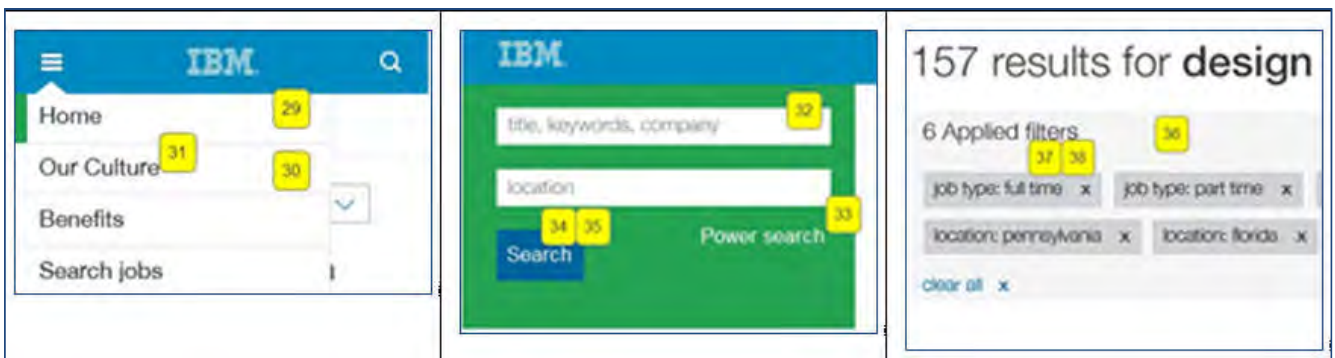


9	Arrow up – button color	Accent color	Opacity 75%, grey scale of header color
10	Batch actions - Cancel	Link color	
11	Batch actions - Check boxes	Base Font Color	
12	Batch actions - Action button background	Accent color	(opacity 75%, grey scale of header color)
13	Batch actions - Primary action (Apply) button color	Button color	
14	Batch actions - Primary action (Apply) text color	Button Font Color	
15	Batch actions - Secondary actions – Base font color	Button color	Non-apply buttons (e.g., Save) is <u>derived</u> from the inverse of TG background color and base font color; base font color is used as the <i>background color</i> for these secondary buttons and the site's background color is used as the <i>font color</i> . E.g., if site background is white (#FFFFFF) and plain text is dark gray (#333333), then the Save button is white text on dark gray button.
16	Batch actions - Secondary actions text color	Button Font Color	Non-apply buttons (e.g., Save) is <u>derived</u> from the inverse of TG background color and base font color



17	Filters (small format) - Arrows	Link color	
18	Filters (small format) - Check marks	Foreground color	
19	Filters (small format) - Clear all	Link color	
20	Filters (Large format) - Filter background	Accent background color	
21	Filters (Large format) - Narrow selections label	Base font color	Slightly larger font size than base font size
22	Filters (Large format) - Filter label	Base font color	Larger than base font size

23	Filters (Large format) - Filter choices	Base font color	
24	Filters (Large format) - Checkboxes	Base font color	
25	Search drop down (small format) - Search drop down background	Foreground color	
26	Search drop down (small format) - Search drop down Link color (Advanced search)	Foreground Link Color	
27	Search drop down (small format) - Search drop down button color	Button Color	
28	Search drop down (small format) - Search drop down button text color	Button Font Color	



29	Search drop down (small format) - Menu drop down background	White	Foreground color is used next to 'Job Search' (or 'Home')
30	Search drop down (small format) - Menu item background color	White	
31	Search drop down (small format) - Menu item text color	Header menu link/text color	
32	Search section (larger format) - Background color (foreground color?)	Foreground color	
33	Search section (larger format) - Link color	Foreground Link Color	
34	Search section (larger format) - Button color	Button color	
35	Search section (larger format) - Button text color	Button Font Color	
36	Applied filter area background color	Accent background color	
37	Applied filter background color	Accent background color	Darker version of accent color
38	Applied filter text color	Base font color	

## Advanced Search

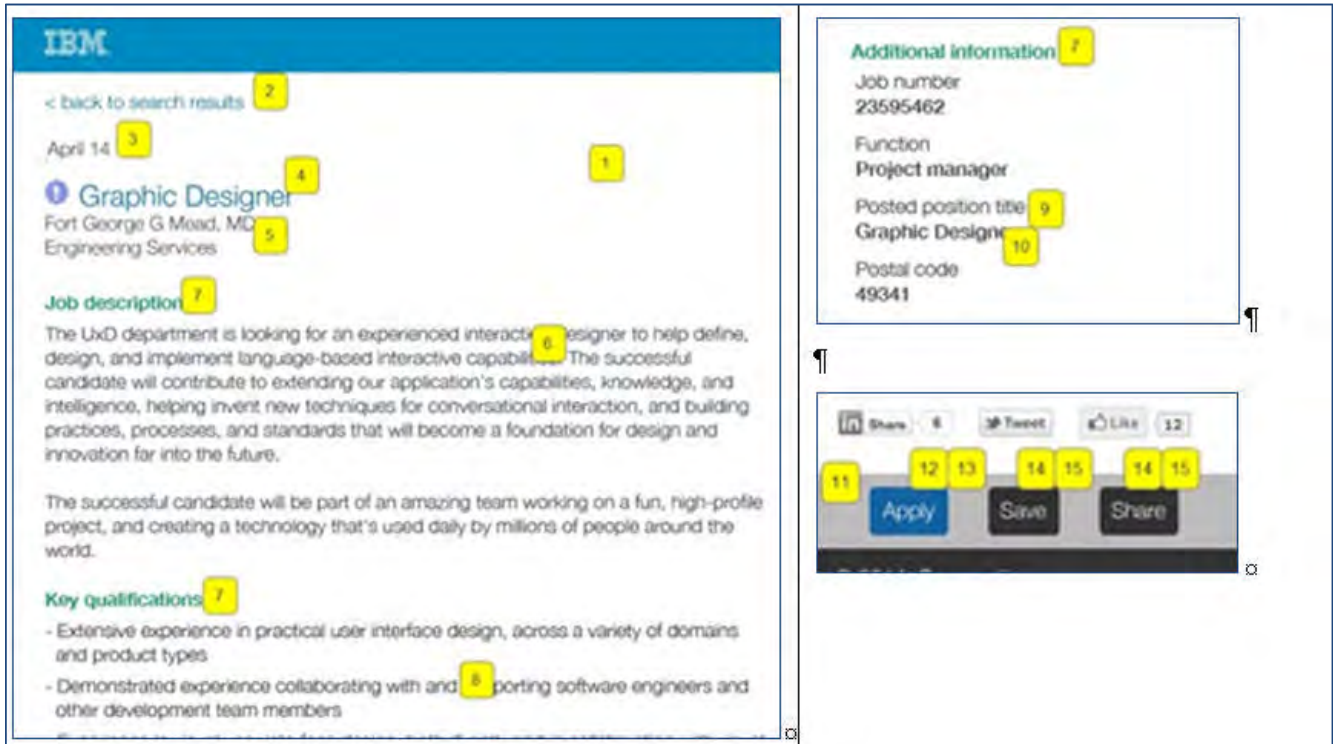
The screenshot shows the IBM Advanced Search page. It features a blue header with the IBM logo and a hamburger menu icon. Below the header, there is a navigation bar with a '< back' link. The main content area is divided into several sections: 'Keyword' with a search input field; 'Location' with a search input field; 'Job type' with four radio button options: 'Full time', 'Part time', 'Contract', and 'Internship'; 'Industry' with a search input field and three filter tags: 'accounting', 'user experience', and 'computer engineering'; and 'Post date' with two radio button options: 'All posting dates' and 'Posted after' followed by a date input field. At the bottom, there are 'Search' and 'Cancel' buttons. Numbered callouts (1-10) are placed over various elements: 1 on the background, 2 on the back link, 3 on the section dividers, 4 on the labels, 5 on the instructional text, 6 and 7 on the filter tags, and 8 on the Search button.

#	Element	Controlled by	Notes
1	Background color	Background color	
2	'Back' text	Link color	
3	Lines between sections	Base font color	
4	Labels	Base font color	Bold
5	Instructional text	Base font color	Lighter version of Base font color
6	Selected search criteria background– Applied filter background color	Accent background color	Darker version of Accent color
7	Selected search criteria text color – applied filter text color	Button font color	
8	Search button background color	Button color	



#	Element	Controlled by	Notes
9	Search button text color	Button font color	
10	Cancel button / hyperlink text color	Link color	

## Job Details



#	Element	Controlled by	Notes
1	Background color	Background color	
2	<back to search results text color	Link color	
3	Position 1	Base font color	Base font size Base font style
4	Job Title	Base font color	larger than Base font size; same size as job title in search results Bold Mockups have this colored separately, but this will use the same font color as main text.
5	Position 3 – base font color & size	Base font color	Base font size Base font style
6	Summary – base font color & size	Base font color	Base font size Base font style



#	Element	Controlled by	Notes
7	Text Area and Label field types - Field label font color	Base font color	Mockups have this colored separately, but this will use the same font color as main text.
8	Text Area and Label field types - Field data font color	Base font color	
9	All other field types than text area and label Field types – Field label font color	Base font color	
10	All other field types than text area and label Field types – Field data font color	Base font color	Bold
11	Action button background	Accent background color	Smaller format only (opacity 75%, grey scale of header color)
12	Primary action (Apply) button color	Button color	
13	Primary action (Apply) text color	Button font color	
14	Secondary actions – Base font color	Button color	
15	Secondary actions text color	Button font color	

# Workbench – Exporting Candidate Forms Configuration to Excel

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IBM® Kenexa® BrassRing® on Cloud Workbench users can now export to Microsoft Excel all candidate form settings, including form details, field details, and field associations. This is particularly useful for quickly reviewing and comparing the form settings

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> LDP 235	<input checked="" type="checkbox"/> BrassRing	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic – see details below.	

## Feature Description

With this release, BrassRing Workbench users can export the configuration information for candidate forms, including:

- Candidate form settings
- Form details (previously not exportable)
  - Form type (single per candidate, multiple per candidate, etc.)
  - Form security (Add/view/modify my, Modify all, etc.)
- Field details
  - Field type (text, numeric, etc),
  - Consolidated columns for Required by Languages, Field Name (Translations)
  - Question branching
  - Autofill source (or grandparent source)
  - Filter list indicator (filter by HR Status or Req field option)
- Field associations
  - for all parent fields in form (instead of one export file per parent field, as previously)

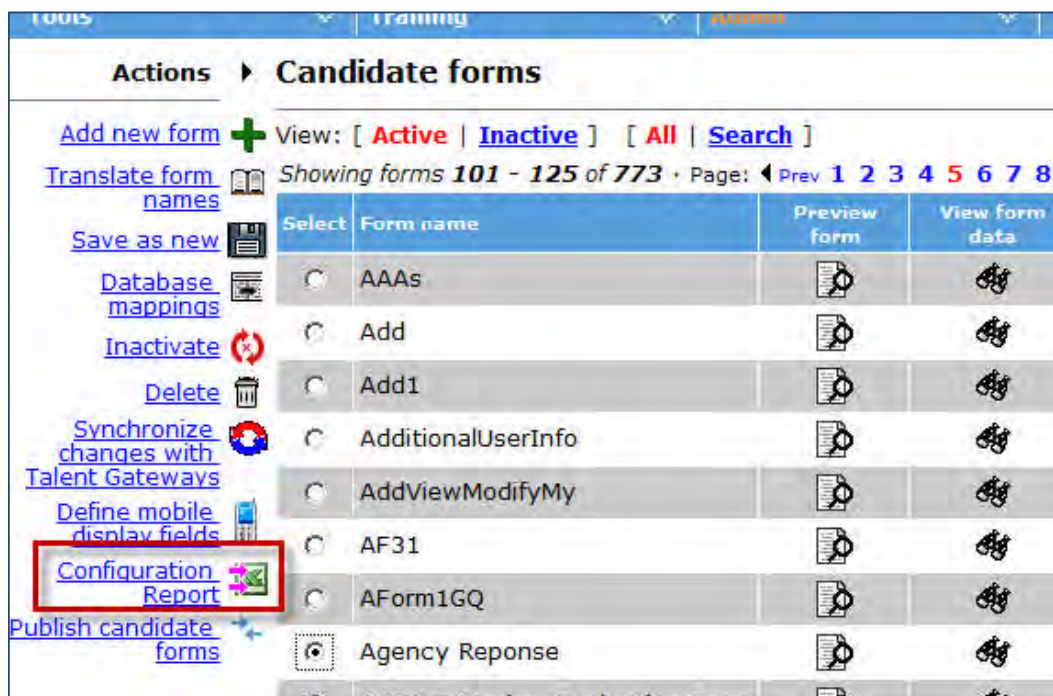
User types who can export this information include:

- Super user
- Tech Services
- All self-service tiers

## Workbench User Experience

### Initiating the Export

1. In Workbench, navigate to **Tools > Forms > Candidate forms**.



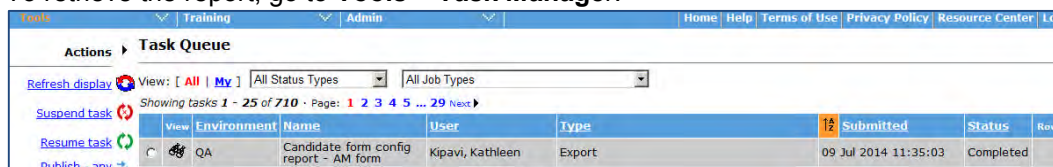
2. To queue the export, select the desired form and select **Configuration Report**.
3. A confirmation that the form export has been queued in Task Manager briefly displays. The confirmation includes the form's database name.

## Retrieving the Export

Task Manager sends an email to the initiating user when the export task has completed.

The email subject indicates success or failure, and the message includes: Task name, environment, client name, date/times the task was submitted, started, and finished. In cases where the export succeeds, the messages includes a pointer to Task Manager to retrieve; for failed exports, the message includes error messaging.

1. To retrieve the report, go to **Tools > Task Manager**.



Status column for your export indicates whether the job is Pending, Running, Completed, Failed (for example, due to code error, timeout, database server unavailability, etc.), or Suspended. (Rows column is blank since the report includes several tabs of information.)

2. To download the Microsoft Excel file for a "Completed" (or "Completed with errors") export, click its View icon. A popup dialog gives you the option to open or save the file.

## Viewing the Output File

The Microsoft Excel export file has four tabs: Properties, Form properties, Field properties, and Field association.

The **Properties** tab includes summary information such as: Client name, task name, environment, user name, date/times the task was submitted, started, and finished.

	A	B	
1	<b>Client</b>	demo-intl	
2			
3	<b>Task Name</b>	Candidate form config report - AM form	
4	<b>Environment</b>	QA	
5	<b>User</b>	Kipavi, Kathleen	
6			
7	<b>Submitted On</b>	Wednesday, July 09, 2014 11:35:03 AM	
8	<b>Started On</b>	Wednesday, July 09, 2014 11:35:11 AM	
9	<b>Finished On</b>	Wednesday, July 09, 2014 11:35:17 AM	

The **Form properties** tab contains data not previously exportable, including properties such as:

- Database Title
- Title
- Disclaimer and translations - purchased languages that aren't populated are not listed
- Form image
- Image alignment
- Form security (Search, output, Add/view/modify my, View/modify my reqs, View/modify all, Save as draft - Save / modify / delete my, Delete al) - only selected values are output
- Email
- Active
- Approval Process
- Cascade approver messages
- Form multiples / type - single candidate, multiple per candidate/req combinations
- Send existing form in edit mode
- Gateway candidate integration form?
- Create form from TG
- Erase with candidates
- Form field alignment
- Form layout
- Enable language toggle
- Include Common Service vendor results
- Event Manager Internal Event Form?
- Event Manager Candidate Facing Registration Form?
- Approval Details - from the Form Approval screen, with Approve/Decline text area field configuration, Approval notification configuration, and Approval routing and re-routing configuration
- Form layout

Best Practice: Immediately upon opening export file in Excel. freeze the top row.

Form setting	Value
Database Title	Enablement-Clients
Title	Enablement for clients[English(Intl)];Enablement for clients;[English (US)]; Enablement for clients[Chinese (Simplified)]; Enablement for clients[Danish]; Enablement for clients[Dutch]
Disclaimer	Disclaimer Text (English (US)); 免责声明文本(Chinese (Simplified));Disclaimer Text(Danish) ; Disclaimer tekst (Dutch) ;Disclaimer Text(English (Intl)) ;Disclaimer Text(English RTL) ; Disclaimer texte (French) ; Disclaimer texte (French (Canadian)) ; Disclaimer Text (German) ;Disclaimer Text(Italian) ; 特記事項(Japanese) ; 고지 사항(Korean) ; Polityka prywatności Tekst (Polish) Disclaimer Texto (Portuguese (Portuguese)) ; Ymwadiad testun (Welsh)
Form image	None
Image alignment	
Search	HR Executive;Super User;HR Staff;Hiring Manager;QuickStart User;Basic User;New UI;Testing;FedCon Recruiter;VKH New UI
Output	HR Executive;Super User;HR Staff;Hiring Manager;QuickStart User;Basic User;New UI;Testing;FedCon Recruiter;VKH New UI
E-mail	
Active	Yes
Approval process	Sequential
Cascade approver messages	No
Form multiples	Single per candidate/req combination
Send existing form in edit mode	No

The **Field properties** tab includes:

- Database field name and Placement
- Field labels - Field name (database, base language, and translations with populated values in one column; semicolon separated)
- Type, Font size, Encrypt, Field length
- Hide (Languages), Required (Languages), Required (User types), Hide (User types), Non-editable (User types) - populated values in one column; semicolon separated
- Options - how the options are stored, as well as Custom List, Pull from: [dbform] dbfield, Pull from: All Active Users, etc.
- Filter options by HR status or Req Field - column indicates whether the field has options that are being filtered by the "Set filtering options" functionality
- Autofill Source
- Question Branching
- Up/Down years
- Date
- Min/Max Value
- Publish as autofill
- Required for form creation from TG
- Input validation
- Purge field data via partial purge
- Integrated URL
- Candidate signature capture onl
- Searchable, Outputable
- Sort type
- Status
- Custom report field
- Order of years
- Confirmation field prefix label
- Mask field input
- Enable confirmation field
- Gateway Questionnaire - Export GQ names using candidate field
- Parent Field an Child Field associations

1	Database field name	Placement	Field name (Base lang)	Field name (Translations)	Type	Font s	Encry	Field leng	Hide (Languages)
2	Labels-TwoColumns	1	Fields in 2 columns	2 columns field(Italian); only output if l	label	Medium	No		French(France),German(Ger
3	Label-AlignedLeft	2		These fields are Aligned Left (only inclu	label	Medium	No		Show only those with 'Yes' cc
4	reqd	3		ReqID	text	Medium	No	255	Will be displayed as in 'purc
5	JobTitle	4		Job title	text	Medium	No	255	
6	Location	5		Location	text	Medium	No	255	
7	Department	6		Department	text	Medium	No	255	
8	Label-OneColumn	7		Fields in one column	label	Medium	No		
9	CandidateTypeAutofill	8		Candidate Type (autofill)	auto-fill	Medium	No	255	
10	Textarea1	9		Explain why you are a good fit for the p	textarea	Medium	No	4000	
11	TextArea2	10		Explain a time where you used good juc	textarea	Medium	No	4000	
12	LabelOptionsHorizont	11		These fields have the options horizonta	label	Medium	No		
13	RadioButton2	12		Is our company paying for relocation of	radio	Medium	No	255	
14	Label-OptionsVertica	13		Fields with options vertical	labelbox	Medium	No		
15	CheckBox1	14		Checkbox field	checkbox	Medium	No	255	
16	RadioButton1	15		Radio button example	radio	Medium	No	255	
17	LabelInstructions	16		This is a really long label field. It is	label	Small	No		
18	Label-ThreeColumns	17		Fields in 3 columns	label	Medium	No		
19	FieldExample4	18		This is an example field	text	Medium	No	255	
20	SingleSelect	19		Salary Range	single-select	Medium	No	255	
21	MultiSelect	20		Multi-select example field	multi-select	Medium	No	255	
22	Label	21		<h>SECTION HEADING</h>	label	Large	No		

The **Field association** tab includes:

- Details of parent child field associations now for *all* candidate field associations in form (Parent option code, Child type, Child Question, Child option, Default selection, Child text (translations, for example: Salary Range[English(US)]; basissalaris[Dutch]; grundløn[Danish]; 底薪[Chinese(simplified)])
- Additional initial column of “Parent field name” (primary sort)

Because this is an *export-only report and will not be used to import field associations*, the columns necessary for adding parent options are not included.

1	Parent Field Name	Parent Option Co	Child Type	Child Question	Child Option	Default Selection	Child Text
2	Salary calculation	Under 30K	Candidate	Multiselect	Basic Salary	Yes	[English(US)Salary Range.[Dutch] basissalaris.[Danish] grund
3	Salary Range	Under 30K	Candidate	Multiselect	HRA	No	
4	Salary Range	Under 30K	Candidate	Multiselect	Medical	No	
5	Salary Range	Under 30K	Candidate	Multiselect	PF	No	
6	Salary Range	Under 30K	Candidate	Multiselect	Multi-Select Option No		
7	Salary Range	30 - 35 K	Candidate	Multiselect	Multi-Select Option Yes		
8	Salary Range	30 - 35 K	Candidate	Multiselect	Multi-Select Option No		
9	Salary Range	30 - 35 K	Candidate	Multiselect	Multi-Select Option No		
10	Salary Range	30 - 35 K	Candidate	Multiselect	Multi-Select Option No		
11	Salary Range	30 - 35 K	Candidate	Multiselect	Multi-Select Option No		
12	Salary Range	30 - 35 K	Candidate	Multiselect	Multi-Select Option No		
13	Salary Range	30 - 35 K	Candidate	Multiselect	Multi-Select Option No		
14	Salary Range	30 - 35 K	Candidate	Multiselect	Multi-Select Option No		
15	Salary Range	30 - 35 K	Candidate	Multiselect	Multi-Select Option No		
16	Salary Range	30 - 35 K	Candidate	Multiselect	Multi-Select Option No		
17	Salary Range	35 - 40 K	Candidate	Multiselect	Multi-Select Option Yes		
18	Salary Range	35 - 40 K	Candidate	Multiselect	Multi-Select Option No		
19	Salary Range	35 - 40 K	Candidate	Multiselect	Multi-Select Option No		
20	Salary Range	35 - 40 K	Candidate	Multiselect	Multi-Select Option No		
21	Salary Range	35 - 40 K	Candidate	Multiselect	Multi-Select Option No		
22	Salary Range	35 - 40 K	Candidate	Multiselect	Multi-Select Option No		

### Limitations and Known Issues

There is no corresponding import functionality for this Excel export.

### How Do Clients Get this Feature?

This feature is available automatically in Workbench without configuration.



# Workbench – Publish Enhancements

This IBM® Kenexa® BrassRing® on Cloud Workbench Publish project is part of an on-going effort to fill in the gaps of Publish functionality to provide a more streamlined process.

IBM® Kenexa® BrassRing® on Cloud Release 14.0		
<b>Feature Areas</b> LDP 089 Phase 5, LDP 260	<input checked="" type="checkbox"/> BrassRing	<input checked="" type="checkbox"/> Workbench
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – internal functionality	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic when Publish Utility is enabled.	

## Feature Description

Release 14.0 introduces the following Publish enhancements:

- [Publish – Event Manager](#)  
Allows publishing of several Event Manager configurations that are configured in Event Manager > Admin > List Maintenance (**Workbench > Tools > Task manager > Publish – Event Manager**)
- Rules Automation Manager Cross-Client Publish  
Allows RAM Publish to function in a “client family” environment, as well as from a base library client, publishing from one client ID to another client ID within the same client family (**Workbench > Tools > Automation Manager > Admin > Publish RAM Triggers**). See *Rules Automation Manager – Internal Publish Across Clients* for additional details (RDP 1004).  
RAM Publish now also validates and adds to the difference report Autoreq numbers that are excluded from the target environment
- Requisition Enhancements  
Publish Req Forms now publishes Enhanced form layout, as well as form attributes, fields, and options, which now includes question branching (**Workbench > Tools > Reqs > Req Forms > Publish Req Forms**)
- Client Settings  
Client settings are now publishable (**Workbench > Admin > Publish clientsettings for *client\_ID***) not available for self-service users.

## Publish – Event Manager

Using the Workbench Publish feature, after Event Manager settings are configured (in BrassRing > Event Manager > Admin > List Maintenance) and tested in the Staging environment, Publish users can now publish many of those settings to the Production environment. This provides a faster, more consistent way of copying Event Manager configurations across environments. Initially with Release 14.0 Build 0, 10 types of configuration settings are publishable, with additional configurations to become available with future builds.

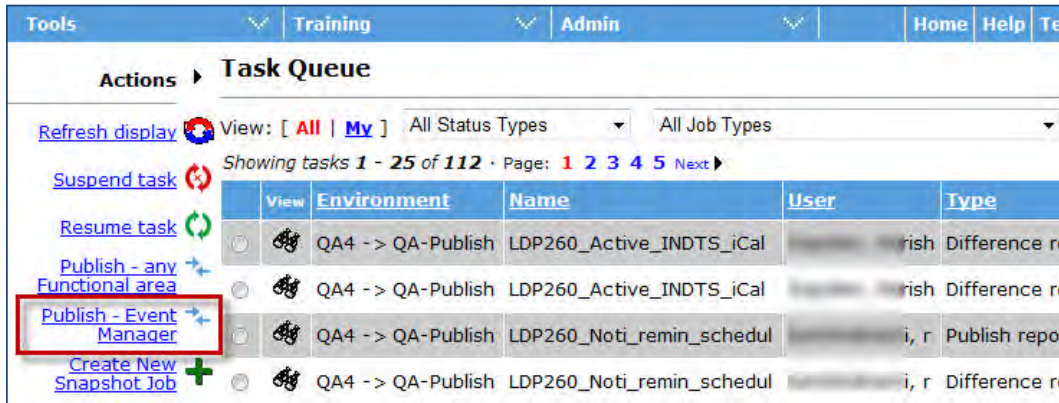


**Enforcement of Unique IDs in Event Manager:** When a dataset is being published, the system checks whether the same dataset is already available. If it is, the additional information is appended to the existing dataset; otherwise, a new dataset is added. In order for the Publish application to determine whether there are existing datasets, Event Manager must have unique datasets. Therefore, Event Manager now validates and enforces dataset uniqueness when the data is created. Data created before Release 14.0 has been remediated in this respect by clients (prior to the release) or by the system (at release), which automatically appended a unique ID to existing events that did not meet the uniqueness criteria

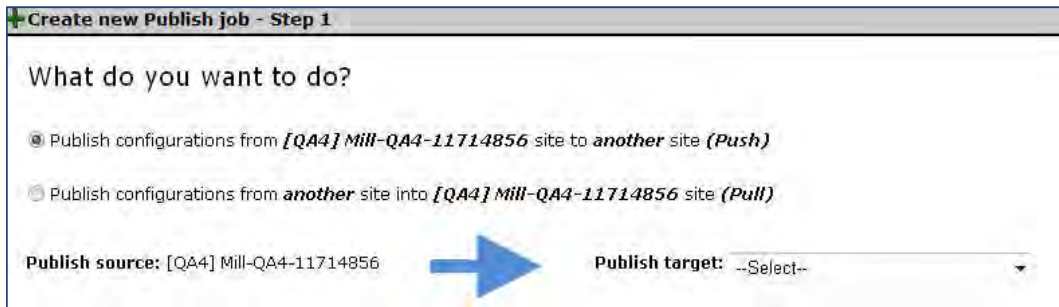


To publish Event Manager configurations from source to target environment:

1. In Workbench, navigate to **Tools > Task manager > Publish – Even Manager**. The link is only visible in accounts with Event Manager enabled.



2. On the Create new Publish job – Step 1 screens, select the source and target environments.



3. Specify a name for the Publish job, and select the Event manager information to be published. You can chooses all, active only, or inactive only.

**Publish source:** [QA4] Mill-QA4-11714856  
**Publish target:** [QA4\_Publish\_Source] Millennium

**\* Job Name:**

---

**\* Publish Functional Area(s):**

**Statuses**  All  
 Active  
 Inactive  
 Selected(0)

**Specialties**  All  
 Active  
 Inactive  
 Selected(0)

**Programs**  All  
 Active

Initially, with Release 14.0 Build 0, the following configurations can be published:

- Assessors
- Competencies
- Locations
- Outcomes
- Programs
- Rating Types
- Regions
- Registration Pages
- Specialties
- Statuses

Additional configurations will be available with future builds.

4. After making your selections, select **Create difference report**.

The screenshot shows a software interface with a list of settings categories. Each category has a checkbox, a text field showing 'Selected(0)', and a 'List>' button. The categories are: Registration Pages, Assessors, ICalendar Files, Message Templates, General Settings, Scheduling Settings, Notification Settings, Privilege Settings, Candidate Form Fields, Activity Templates, and Event Templates. A large blue watermark 'Future functionality' is overlaid on the list. At the bottom, there are three buttons: '<< Back', 'Cancel', and 'Create difference report'. The 'Create difference report' button is highlighted with a red border.

5. Navigate to Task Manager to view the difference report.
- to run an updated version of the current difference report, click **Re-run this Difference Report**.
  - to create another difference report if the items are incorrect, click **Create New Difference Report**.
6. Click **Proceed to Publish** after verifying that all is correct in the current Difference Report.
7. To publish, click **OK** at the prompt, "ALL changes in this Difference Report will Publish to the Target environment. Are you sure you want to proceed?"
8. Navigate to **Tools > Task Manager** to view the Publish report.

## Who can use this feature?

This feature is available in Workbench for Self-Service Tier 7 and IBM internal use, for client sites with the (restricted) Publish client setting enabled.

# Workbench - Stacking Logic Enhancements

This feature introduces new IBM® Kenexa® BrassRing® Workbench configuration settings that control access to candidate stacking fields.

IBM® Kenexa® BrassRing® on Cloud Release 14.0	
<b>Feature Areas</b> RDP 1076, 1077, 1078	<input checked="" type="checkbox"/> Agency Managers, Talent Gateways, Gateway Questionnaires
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact our Support Team for implementation details.

## Feature Description

Currently, candidates and agency contacts can access and edit candidate stacking fields. This feature introduces two new Workbench settings:

- Allow Agency Contacts to edit candidate stacking
- Allow Candidates to edit candidate stacking fields

The Default settings for these two Workbench settings are Yes. When either of these controls is set to No, the candidate stacking setting displays as read only. When the Allow candidates to edit candidates stacking fields is set to No, candidates cannot edit stacking fields on either Talent Gateways (TGs) or any Gateway Questionnaires (GQs) associated with that TG.

## Agency Contacts User Experience

The default Workbench setting allows agency contacts to edit and submit stacking field changes.

Agency contact navigates to:

1. Active candidate tab.

2. Completes candidate stacking field information.
3. Selects Submit.

## Candidate User Experience

The default Workbench setting (Yes) allows candidates to edit and save stacking field changes.

Candidate navigates to:

1. Talent Gateway profile page, contact information tab:

The screenshot shows a web form for updating contact information. At the top right are 'Save' and 'Back' buttons. The form has four tabs: 'Contact information' (selected), 'Work experience', 'Education', and 'Attachments'. The 'Contact information' tab contains the following fields:

- \*First name: (highlighted with a red box)
- Middle name:
- \*Last name:
- Address line 1:
- Address line 2:
- Country: (dropdown menu showing 'United States')
- City:
- State/Region/Province: (dropdown menu showing 'Alabama')
- Zip/Postal code:
- \*Home phone: (with value '02042940242')
- Work phone:
- Other phone (i.e. mobile):
- \*Contact e-mail address: (highlighted with a red box)
- Fax:
- Web address:

Below the form, there is a note: "The e-mail address will be used to contact you". A section titled "\*Select your communications preference(s)" has three radio buttons: "E-mail", "HTML format" (selected), and "Text format". Below this is the text "Contact e-mail address is used to contact you". A "Login information" section contains an "E-mail address" field with the value "testaccount@kenexa.com". At the bottom right are two links: "Change password" and "Change security questions".

2. Enters profile stacking information.
3. Selects Save.

## How Do Clients Get this Feature?

These features are controlled by the new Workbench settings. Please contact our Support Team or your Certified Workbench User for more information.

# Configuration Tasks

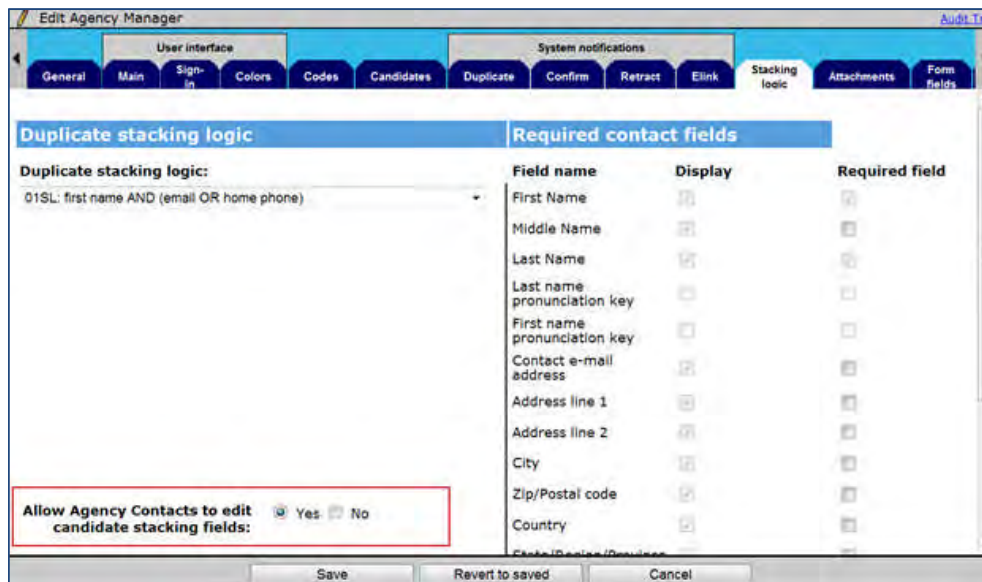
This section describes the tasks required to configure this feature. Tasks labeled Workbench Self Service can be performed by certified Workbench Self Service users or by our support staff.

## Gateway Settings – Workbench (Support Staff)

### Agency Contacts

To edit the Agency Contacts access, WBSS user navigates to:

1. Workbench > Tools > Agency Managers > Add/Edit Agency Manager > Stacking Logic tab.



2. Selects the Yes radio button for Allow Contacts to edit candidate stacking fields.
3. Selects Done.

## Gateway Settings – Workbench Self-Service (Tiers 5+)

### Candidates

To edit the Candidate Stacking Field access, WBSS user navigates to:

1. Workbench > Tools > Talent Gateways > Add/Edit Talent Gateway > Stacking Logic tab.

Edit contact fields and stacking logic

Duplicate stacking logic	Contact fields	
Duplicate stacking logic:	<b>Field name</b>	<b>Display Required</b>
01SL: first name AND (email OR home phone) ▼	First Name	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
	Middle Name	<input type="checkbox"/> <input type="checkbox"/>
	Last Name	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
	Last name pronunciation key	<input type="checkbox"/> <input type="checkbox"/>
	First name pronunciation key	<input type="checkbox"/> <input type="checkbox"/>
	Contact e-mail address	<input checked="" type="checkbox"/> <input type="checkbox"/>
	Address line 1	<input checked="" type="checkbox"/> <input type="checkbox"/>
	Address line 2	<input checked="" type="checkbox"/> <input type="checkbox"/>
	City	<input checked="" type="checkbox"/> <input type="checkbox"/>
	Zip/Postal code	<input checked="" type="checkbox"/> <input type="checkbox"/>
	Country	<input checked="" type="checkbox"/> <input type="checkbox"/>
	State/Region/Province	<input checked="" type="checkbox"/> <input type="checkbox"/>
	Home phone	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
	Work phone	<input checked="" type="checkbox"/> <input type="checkbox"/>
	Other phone	<input type="checkbox"/> <input type="checkbox"/>
	Fax	<input type="checkbox"/> <input type="checkbox"/>
	Web address	<input checked="" type="checkbox"/> <input type="checkbox"/>
	Candidate stacking field	<input type="checkbox"/> <input type="checkbox"/>
<p><b>Allow Candidates to edit candidate stacking fields:</b> <input checked="" type="radio"/> Yes <input type="radio"/> No</p>		
<p>Done    Reset to saved    Cancel</p>		

2. Selects the Yes radio button for Allow Candidates to edit candidate stacking fields.
3. Selects Done.



# Workbench – Work Opportunity Tax Credit Configuration

Previously, enabling Work Opportunity Tax Credits (WOTC) for clients required internal configuration by Configuration Engineering. This feature introduces a new Workbench client setting enabling WorkBench Support Staff to initiate WOTC integrations.

IBM® Kenexa® BrassRing® on Cloud Release 14.0	
<b>Feature Areas</b> <b>LDP 158</b>	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No –requires specific conditions / configuration for visibility.
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic – see details below.

## Feature Description

Previously, in order to configure WOTC, BrassRing client representatives needed to complete custom engineering requests for WOTC integration and configuration. This feature introduces a new Workbench setting enabling WB Support Staff to configure WOTC integrations.

Users with the **Super** and **Tech Services user type** privileges have access to the new WOTC configuration fields while editing or configuring client settings.

## How Do Clients Get this Feature?

This feature is available automatically and is controlled by the existing client setting – **Work Opportunity Tax Credit Integration**.

Please contact our Support Team or your Certified Workbench User for more information.

# Configuration Tasks

This section describes the tasks required to configure this feature. Tasks labeled Workbench Self Service can be performed by certified Workbench Self Service users or by our support staff.

## Client Settings – Workbench (Support Staff)

Support Staff navigates to:

1. **Workbench > Select a client > Edit > Work Opportunity Tax Credit Integration**  
–OR–  
**Workbench > Admin > Manage Clients > Edit client settings** [for selected client] > Work Opportunity Tax Credit Integration

The screenshot shows the 'Edit client settings' interface. At the top, there are dropdown menus for 'VersionTalentGateway' (set to 1.7) and 'VersionTGbasic' (set to 2.5). Below these is the 'Work Opportunity Tax Credit Integration' section, which has radio buttons for 'No' and 'Yes' (the 'Yes' button is selected). A 'Configure' button is located to the right of the 'Yes' radio button and is highlighted with a red rectangular box. Below this is the 'Years exp\Grad year config' dropdown, set to 'Display both min and max search field'. A section titled 'Restricted Settings: These Settings are not available for general use' follows, containing several other settings with radio buttons for 'No' and 'Yes'. At the bottom of the window are 'Save', 'Revert to saved', and 'Cancel' buttons.

- **Yes** – When **Work** Opportunity Tax Credit Integration is enabled, the **Configure** button is enabled for users to configure the relevant WOTC settings.  
If WOTC is set to Yes but users do not configure the relevant settings, then the following error message is displayed when user clicks **Save** on the Client Settings screen: “WOTC Settings not configured.”
  - **No** – WOTC is not enabled; therefore, **Configure** remains disabled.
  - **Configure** – Launches the ‘Configure WOTC Settings’ window when clicked.
2. Selects **Configure**. The Configure WOTC Settings window launches.

3. Completes all WOTC configuration settings for each WOTC vendor. The following table details WOTC configuration fields.

Fields	Description
Audit Trail	Display the audit trail of changes made to the WOTC settings (in pop-up window).
Select Vendor	Select from the list of WOTC vendors (ADP, Ernst & Young, and First Advantage).
Company ID	Provide the company ID that is unique to the client and the WOTC vendor.
User Name	Provide the user name (or userid) that is specific to the client to pass WOTC information to the vendor.
Password	Provide the corresponding password for the user name (or userid) provided.
Re-enter Password	Provide the password again to validate..
Partner ID	Provide the partner ID.
Location Field	Create field mapping for Location Field.
Job Title field	Create field mapping for Job Title Field.
Hourly Rate field	Create field mapping for Hourly rate Field.
WOTC URL	Display the WOTC web service URL based on the vendor selected.

Fields	Description
Sub-Company ID	Map this field to a custom req field created by the client for their sub-companies. This field is mandatory if vendor is <b>ADP</b> .
Sub-Company Password	Map this field to a custom req field created by the client for the respective sub-company ID. This field is mandatory if vendor is <b>ADP</b> .
Save	Save your changes and close the WOTC settings window.
Revert to Saved	Revert your changes and display previously saved values.
Cancel	Close WOTC Settings window without saving any of the updates made by user.



## IBM® Kenexa® BrassRing® on Cloud

### Release 14.0 Minor Project Visible Changes

**This document includes visible change items (from R13.4 build 1 through R14.0 build 0) that are not yet documented or that will not be documented individually in the Release 14.0 Product Update Guide.**

#### 1. BrassRing – Password Security RDP 1073

To improve system security, we have changes several BrassRing Workbench client settings that previously could be configured without protections in place. Changes became effective with Release 13.4 Build 13.

Client setting options designated as “risky” in the following lists are no longer available. Any client’s client settings that were still configured with those options as of Release 13.4 Build 13 were automatically changed to the more secure default options. For example, if setting Lockout Period BrassRing was configured to N/A at that time, it was automatically reset to the default setting of 10 minutes.

The following are the settings where changes provide mitigation for the highest risks:

##### 1. Lock out Period

- Available options: N/A, 10 min (default), 20 min, 30 min, 40 min, 50 min, 60 min
- Risky option: N/A (i.e., lockout disabled, users are never locked out) – *This option was removed from the selectable list & clients with N/A were reset to default.*

##### **Impact to users (for clients with value changed from N/A to 10 min):**

After 3 incorrect password attempts, users are locked out for 10 min. Once in lock-out mode, they continue to be shown the following error messages regardless of whether the credentials are correct:

“Your credentials could not be validated” (if 'Generic Login' is set to Yes)

or

“Your account has been locked” (if 'Generic Login' is set to No)

After the 10 minute period expires, the system again validates their credentials and logs them in if they are correct.

##### **Affected Client Settings are:**

- Lockout Period Agency
- Lockout Period BrassRing
- Lockout Period Gateway

##### 2. Password Frequency

- Available options: N/A, 30 days, 60 days, 90 days (default)
- Risky option: N/A (i.e., password never expires) – *This option was removed from the selectable list & clients with N/A were reset to default.*

##### **Impact to users (for clients with value changed from N/A to 90 days):**

If users have not reset their password within the past 90 days, they are forced to reset upon next log in.

**Affected Client Settings are:**

- Password Frequency Agency
- Password Frequency BrassRing
- Password Frequency Gateway

The following setting was changed to provide mitigation for medium risks:

**Assessment Link Expiration**

- Available options: N/A, 1-365
- Risky option: N/A (i.e., never expires) - **This option was removed and all clients should enter 1-365.**

**Impact to users (for clients with value changed from N/A to 365):**

Candidates returning to complete an assessment more than 365 days after first being asked to take it, no longer have access to the link. A fresh link can be generated using the Run Assessment action.

**Affected Client Setting is:**

- Integration Assessment Link Expiration (1-365)

## 2. BrassRing – User Password Policy Changes RDP 1041

To improve the standards of the BrassRing Users login security, the following changes were introduced for the user profiles that are added to the system using XML Import.

- When a user profile is imported into the system, the default password is verified to ensure that it is at least eight characters long.  
If the password set on a user profile creation is not at least eight characters long, the user creation fails and an error message is returned in the response XML.  
Error message that is returned is: **Password must be at least 8 characters.**
- When a user profile is imported into the system, the default password is verified to ensure that it has at least two character types. The possible character types are Latin-based alphabetic (A-Z, a-z), numeric (0-9), and special ({}[],.,\;:’”?”|’~!@#%&^\*()\_+ = and extended characters like ñ). Space (including leading and trailing spaces), the ampersand (&), the right angled bracket (>), and left angled bracket (<) are not allowed.  
If the password set on a user profile creation does not contain at least two of the three character types, it fails the user import and an error message is returned in the response XML. Error message that is returned is: **Password must contain at least 2 of the following character types: Numeric, Alphabetic, and Special Characters.**  
If password contains unsupported characters, another error message is returned: **Password can contain only Latin-based characters (A-Z, a-z, 0-9, {}[],.,\;:’”?”|’~!@#%&^\*()\_+ = and extended characters like ñ).**
- When a user profile is imported into the system, the default password is verified to ensure that it does not include the username. If the password set on a user profile creation contains the username of the user, the user creation fails and an error message is returned in the response XML. The error message that is returned is: **Password cannot contain the username.**

**Note:** these changes apply only to user profile creation via XML Import since when a user profile is updated using XML import, passwords do not get updated.

### 3. Communications – File Upload Enhancements LDP 245

When creating and editing email templates and sending communication using BrassRing, users can currently select one file for upload at a time. Starting this release, you can also select a .zip format file for upload.

The following are the areas in communications which have this enhancement.

- Add | Edit communications template; View and Delete pages
- Send communication (to candidate)
- Send communication (to agency contact)
- Auto Send email template with .zip file(s) via Automation Manager | RAM
- Viewing the Talent Record Action Log for a candidate
- Viewing Talent Record Communication History grid for a candidate

### 4. Communications – New Alert Message

A new alert message is displayed when BrassRing users make changes to the communication templates in the following scenarios:

- While changing Sending Method from Auto Send to Manual
- While changing Sending Method from Auto and Manual Send to Manual

**Alert Message:**

"Warning: Do not change the Sending method designated as 'Auto Send' or 'Manual and Auto Send' for a template that is used by Automation Manager or RAM triggers because the triggers will break. To use this template in the manual flow, create a new one that is identical and set Sending method to 'Manual'."

### 5. Communications – CK Editor – Image Upload

Based on requests from clients, image upload feature in the CK Editor is enabled with this release. BrassRing users that have access to communication templates which use CK Editor can upload logos and other images in any text area fields of the communications module using the file browser.

### 6. Reqs – Mass Req Update

In order prevent system time outs and general processing issues when users perform Mass Req update, the following check points are being implemented starting this release.

- Stop the user if there is already a request in progress initiated by the same user. If a request by a user is already in progress, that user is blocked from creating an additional request until the first is completed. This is to ensure that there is no overlap in update requests. An error message is displayed stating: "You currently have a Mass Requisition Update pending. Once the update has been processed you may submit another."

- Limit up to 5000 reqs per request

An error message is displayed on the req search page if the criterion provided results in more than 5,000 reqs found. The error message is: "Your results exceed the allowed 5,000 requisition limit. Please refine your search and try again."

### 7. Candidates – HR Status Listing Enhancements

The HR Status listing page is launched from Candidate Search results and classic candidate listing pages, via the HR Status column and icon, or from the Candidate Results panel, via the HR Status editor>View History selection at the bottom.



A new column **Prior Status** is added to the Current Status tab of the HR Status listing page. This column displays the previous HR status of the candidates from which they were moved to the current HR status for each req.

HR status date	Folder	Req ID	Req/Folder	Updated by	HR status (click to update)	Prior status
23-Aug-2011		65585	Middle East Negotiator	Support (ssundaram), rBrassRing	Offer Accepted	Offer extended
04-May-2011		62685	Perf analyst Open	Bojkova, Lilya	Drug Screen	Reference check
11-Sep-2009		5785	General Medical II	Bojkova, Lilya	0-Filed	Review
29-Jul-2009			folder 1	Hitterman, Veronica	Phone Screen	Review
29-Jul-2009			folder 2	Hitterman, Veronica	Phone Screen	Review

Similarly a new column Prior Status is added to the Status history tab of the HR status listings page. This column displays the previous status of each candidate in a particular req from which they are moved to the current status. In addition, this tab also displays the history of statuses that were undone. Therefore, Prior status is displayed even for an undone status, but it is shown with a strikethrough as it does for the current status.

HR status date	HR status undo date	Undo by	Folder	Req ID	Req/Folder	Updated by	HR status	Prior status
22-Aug-2011				65585	Middle East Negotiator	Support (ssundaram), rBrassRing	Reference Check	Interview
<del>19-Aug-2011</del>	19-Aug-2011	Support (ssundaram), rBrassRing		65585	Middle East Negotiator	Support (ssundaram), rBrassRing	Reference Check	<del>Interview</del>
17-Aug-2011				65585	Middle East Negotiator	Support (ssundaram), rBrassRing	Drug Screen	Reference Check
17-Aug-2011				65585	Middle East Negotiator	Support (ssundaram), rBrassRing	Interview	Phone Screen
17-Aug-2011				65585	Middle East Negotiator	Support (ssundaram), rBrassRing	Phone Screen	Review
17-Aug-2011				65585	Middle East Negotiator	Support (ssundaram), rBrassRing	0-Filed	Review
04-May-2011				62685	Perf analyst Open	Bojkova, Lilya	Interview	Phone Screen
02-Mar-2010				63385	MTM - Test 01	McDonald, Mithael	Hired	Offer Accepted

## 8. Candidates – HR Status Update

Earlier, BrassRing users were able to undo the HR Status of candidates associated to a closed requisition. Users were able to perform this by going to HR Status advanced options. This issue is now fixed and the following error message displays when users attempt to change the HR Status of a candidate associated to a closed requisition.

"HR Status could not be updated because the req status has been changed."

## 9. Talent Gateways – Social Networking Information

For Talent Gateways with the Social Media Integration setting enabled, **Social networking information** page will display additional information:

- New **Access levels granted** column is added between the column displaying icons for clients' enabled social media sites and the Authorize/Unauthorize column. For social networks that have been authorized, the new column lists the levels of access that have been granted.

For networks that have not been authorized, the column shows the access level that will be requested.

Options depend upon your configuration (social networks selected in the Talent Gateway setting “Social Media Integration,” and Talent Gateway “Social media integration – allow post to my social networks” setting) but can include:

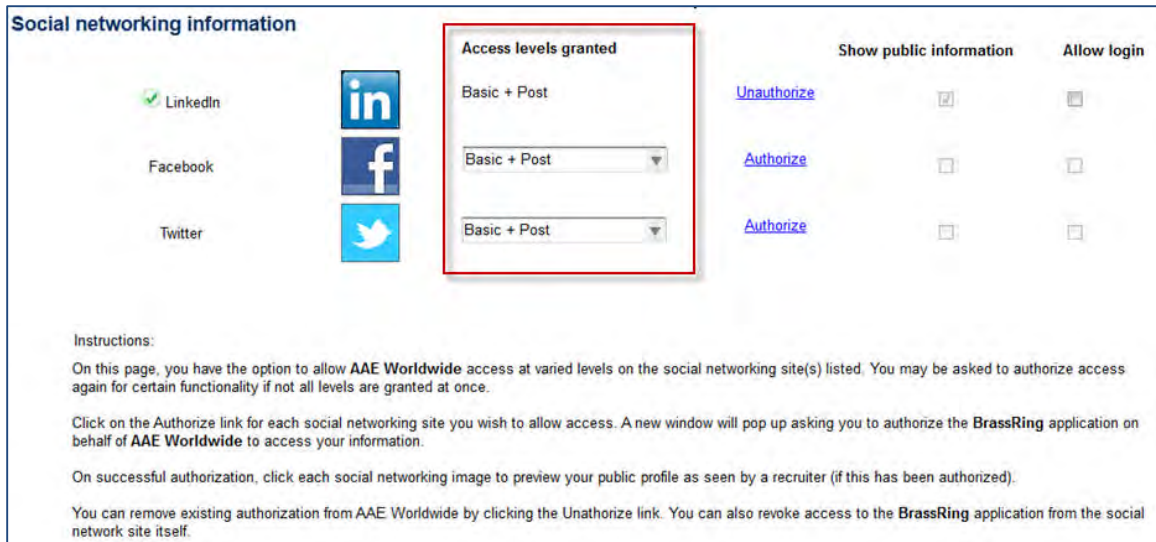
- Basic** (indicates authorization of access to profile, email address, and contact information)
- Basic + Post** (Post indicates authorization to post social network updates)

Candidates access the Social networking information page after logging into the Talent Gateway. From the Welcome page, they can select:

**Social Networking Information**

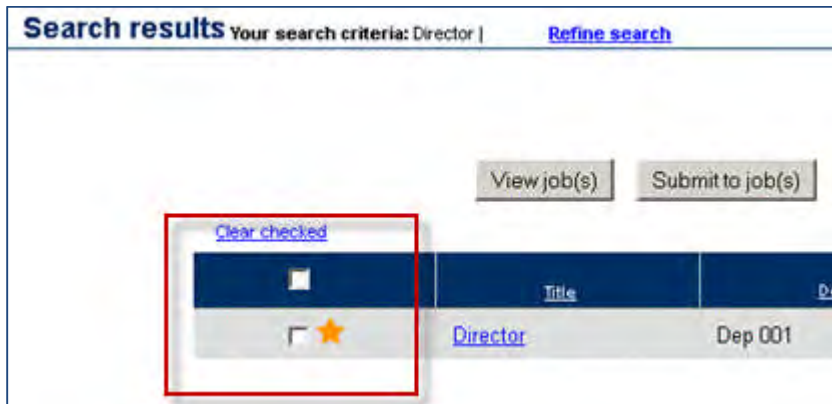
–OR–

**Edit Profile > Social Networking Information**



**Featured Job Icon**

For Talent Gateways using featured jobs, the appearance of the “Featured Job” icon that displays on **Search Results** pages is changing to a star. Candidates will see this icon beside the check box (within the check box column) for any featured jobs.



**10. Talent Gateways – Password Security Updates RDP 1040**

Starting this release, the changes are made in password management for candidates in BrassRing Talent Gateways (including Mobile, Candidate API and Gateway Questionnaires) and for agency contacts in BrassRing Agencies.

Following are the changes in Password management:

- Passwords cannot be changed more than once in 24 hours.
- Eight most recently-used passwords cannot be used again.

BrassRing Talent Gateway “Password tips” help has been updated for candidates with a note to this effect. The **Submit** button on the reset password pages is disabled for 24 hours after a password change request is submitted. If a candidate or a user tries to update the password using the “Forgot Password” link, an error message is displayed to this effect.

**Reset password** ? Help

You have attempted to change your password twice within a 24hr period. For your security, password changes are only allowed once per day. Please wait 24hrs to reset your password again.

Please reset your password as follows:

- Your password must be a minimum of 8 and a maximum of 25 characters.
- Your password must contain at least one of the following special characters: {}[].,<>;:'''?/\`~!@#\$\$%^&\*()\_~+=.
- Your password may not contain spaces.
- Your password may not be the same as your username.
- Your password may not be the same as any of the 8 previous passwords.
- Your password will be case-sensitive.

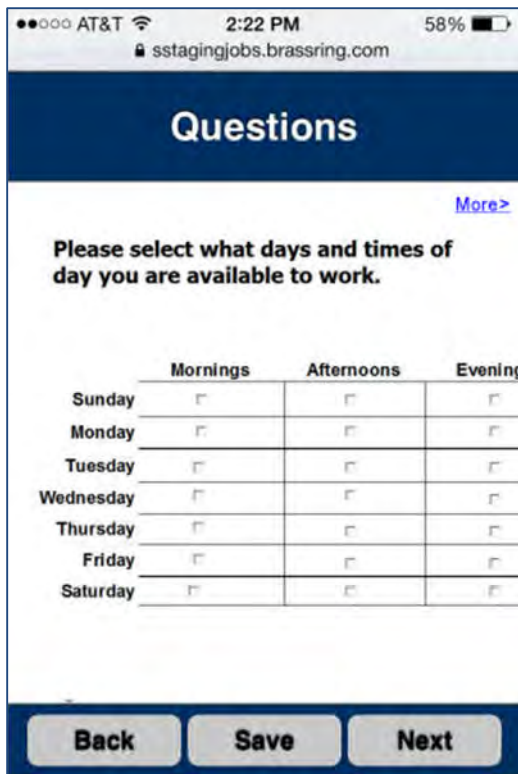
Enter new password  [Password security tips](#)

Confirm new password

disabled until >24hrs after last password change

## 11. Talent Gateways – Grid Fields in Mobile Apply RDP 1050

Starting this release, Grid form fields used in job specific questions on BrassRing Talent Gateways are optimized for mobile display. The question is displayed at the top of the grid and each cell of the grid contains a check box. Depending on the number of rows and columns in the grid, candidates scroll through the grid (using More> and <Back scroll indicators that appear when needed) and answer questions by selecting the appropriate intersecting cells. Clients are requested to preview the grid form fields on mobile screens so that they can make grid configuration changes for better display on a mobile screen. Any grid configuration changes made are applicable to the display of the grid on both mobile and non-mobile devices.



## 12. BrassRing Agency – Display Text

When an agency contact’s BrassRing user profile is deactivated, all the candidates that are corresponding to the profile are transferred to a different agency contact’s profile. Irrespective of the agency, the text on the transfer screen mentioned the name of the agency as “test”. This is now corrected. The name of the Agency contact is displayed on the transfer screen.

## 13. Data Insight Tool – Report Notification Email Address

The email address that sends Data Insight Tool report notifications has been updated from DataInsightTool@kenexa.com to DataInsightTool@Brassring.com. Please add this address to your contacts to ensure you are able to receive these emails from Data Insight Tool.

## 14. Assessments – Enhanced Candidate/Test Taker Experience

Based upon client feedback, **IBM® Kenexa® Assess on Cloud** is releasing a comprehensive redesign of the Test Taker Experience. This new interface gives candidates/test takers the freedom to take assessments on desktop, tablet and mobile platforms. The Kenexa Assess system will automatically adapt the appearance and behavior of online assessments based on the size of the test taker's screen/browser window.

- Test takers will experience a fresh, simple-to-use interface with consistent navigation across a wider variety of devices and screen sizes.
- The new interface was developed using Responsive Design development techniques and therefore gives candidates/test takers the freedom to take assessments on desktop, tablet and mobile platforms.
- This new UI design is also part of our strategic initiative to meet accessibility standards.
- Branding capabilities have been streamlined.
- New features will be added to allow clients to specify which display sizes to allow assessments to be taken on.

The new user interface will automatically be available for all test takers of any IBM® Kenexa® Assess on Cloud client as part of the October 3.10 product release.

### 15. Assessments – Candidates Reapply RDP 1075

New logic verifies whether the results of the assessments taken by a candidate are active or expired when the candidate reapplies for the same position. If the results have expired, the system prompts the candidate to take the assessments again. After the candidate completes the assessments, the candidate's BrassRing Talent Record is updated with the latest results and the reapply status.

### 16. Candidate Bulk Upload – Autofill from Users List RDP 1019

The "Bulk Candidate Upload Instructions.xls" file, which is linked from the "Add Multiple Candidates" page (Candidates > Add Candidate > Add Multiple Candidates), has been updated to include information for correctly specifying user names in the Excel input file.

BrassRing users must enter user names in the Excel input *exactly* in the same format in which the name appears within the BrassRing UI, or as displayed on the candidate form [Name (differentiator)] when User name differentiator is in use. For example:

If the user name within the candidate form UI displays Amun, Sivakumar (KT501), then none of the following would be valid:

- Amun, Sivakumar ()
- Sivakumar, Amun (KT501)
- Amun, Sivakumar
- Sivakumar, Amun
- Amun, Sivakumar (KT501)                      *Spacing must be single-space*

### 17. Talent Match – Match Accuracy Column

When performing a Talent Match search from various areas of BrassRing, a column titled "Match Accuracy" displays in the results containing a percentage number which should reflect the relevance of the result. As part of an ongoing larger project related to performance enhancements, this column will no longer appear in Talent Match results. Search results will continue to be sorted with the most relevant matches on top. Users should review matches in this order to maximize the Talent Match functionality. Users will see this change in production starting the week of Sept 29, 2014. This is intended to be a temporary change as there is a Roadmap item around enhancements of this column.

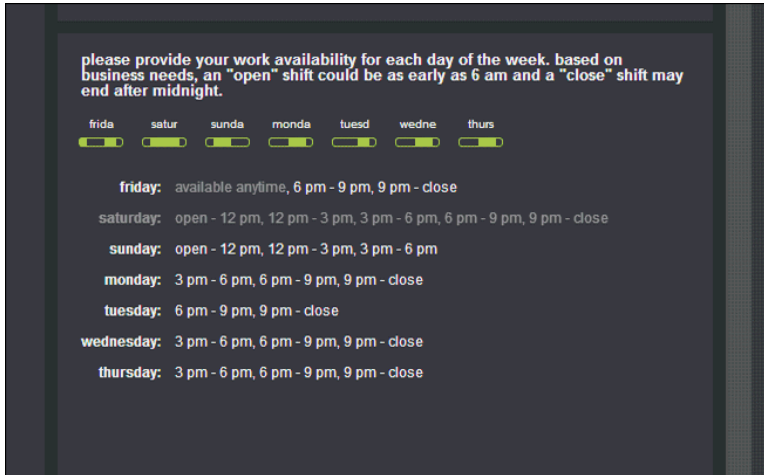
### 18. RapidHire – Candidate Profile Display Enhancement

There is a difference between the Availability grid information that is displayed on the RapidHire candidate profile page and the position folder screen (candidates list). The candidate profile page displays additional information for a candidate when compared with the information in the position folder screen.

This is because, only active values are displayed in the candidates list, whereas, both active and inactive values are displayed in the candidate profile page as a historical record for the candidate.

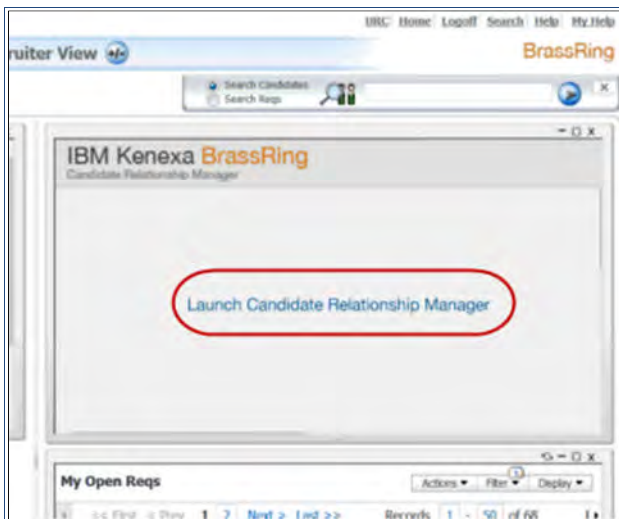
With this release, in order to avoid confusion with the additional data, visual differentiation is introduced between the inactive values and the active values for candidate profile grid display. The inactive values are displayed in Dark Grey.





## 19. Integrations – BrassRing Welcome Page CRM Panel

Starting with this release, there will be a visible change to the **IBM Kenexa BrassRing Candidate Relationship Manager (CRM)** panel within **IBM Kenexa BrassRing on Cloud**. In order to improve performance of CRM, we will be disabling the automatic login to CRM from BrassRing. The current panel will be updated to display a static page with a link to launch CRM. No log in will be required by users, and clicking on the "Launch CRM" link will automatically log the user in and launch CRM. We believe this will have minor impact to a user's experience since the current functionality also requires clicking into the panel in order to leverage the CRM features. If you have concerns or questions regarding this change, please contact your IBM Representative. We apologize for any inconvenience this may cause and appreciate your patience as we work to improve our system.



## 20. Integrations – Country Code Changes

Clients who utilize Candidate Import integrations should be aware of the coming changes in our database country/city codes.

The candidate export is currently sending an incorrect 2-digit country code for Republic of Serbia. Therefore the following changes are made with this release:

- Republic of Serbia code is changing from CS to **RS**.

- Kosovo code is changing from RS to **XK**.

Clients' associated historical data will automatically be updated to match the new codes.

## 21. Social Media – Sunset of Apply With LinkedIn

LinkedIn has sunset the “Apply with LinkedIn” feature. Therefore, the BrassRing Workbench setting “Enable Apply with LinkedIn button” for BrassRing Talent Gateways is being hidden for all clients. This setting is already hidden for new clients and for those clients that have this setting configured to “Yes”, the option is changed to “No” and the setting is hidden.

The screenshot shows a configuration page with several radio button options. The option 'Enable Apply with LinkedIn button:' is circled in red and has the 'No' radio button selected. Other options include 'Social media integration - allow post to my social networks for Candidates:', 'Social media integration - allow post to my social networks for Non-system users', 'Social media integration - allow post to my social networks for Recruiters:', 'Social media integration - allow post via social referral email:', 'Social media integration - show share buttons on job details page:', and 'Social media integration - enable login:'. Below these are 'Special configurations:' with several unchecked checkboxes.

## 22. Mapping Tool – New Integration Option

A new integration type Candidate Field Association Import is available in the Self Service Mapping Tool for client-side users that administer integrations.

In addition, the Talent Gateway Profile Integration is also available starting this release which includes Form data import.

## 23. Data Insight Tool – Additional Event Manager Reporting LDP 147

With this release, additional Event Manager data will be available via the Data Insight Tool. Specifically, new filter and output fields are added for improved reports on assessor schedules as well as event batches. Now, Data Insight reports can be configured to report on which assessors are working on selected events; what time they are working; which events are the selected assessors working on; who are the assessors that have cancelled out of events during a selected timeframe; which assessors are working on specific events during a selected time period and what event batches are associated with selected events.

No additional configuration is required to use these new filter and output fields in the Data Insight Tool. Following is the list of new sections and fields added in the Data Insight Tool:

- Event Series Name – A new field
- Assessor Shortage – A new field
- Assessor Shift – A new subsection
  - Assessor shift name – A new field



- Start date/time – A new field
- End date/time – A new field
- Start date/time in UTC – A new field
- End date/time in UTC – A new field
- Required assessors – A new field
- Assessor shortage – A new field
- Assessors – A new subsection
  - Email – A new field
  - Location – A new field
  - Business group – A new field
  - Specialty – A new field
  - Default time zone – A new field
  - Preferred language – A new field
  - Active – A new field
  - Hiring manager – A new field
  - Recruiter – A new field
  - BrassRing user – A new field
- Assessor History – A new subsection
  - Date – A new field
  - Added by – A new field
  - Note – A new field
- Event Batch – A new subsection
  - Name – A new field
  - HR status – A new field
  - Invite to – A new field
  - Event Manager – Add/View Form Widget **RDP 1052**

A new option that can be set in Event Manager (EM) will allow users who are assessors to access the BrassRing Add/View Form widget to pull BrassRing forms data into Event Manager. This provides the ability to add forms into the Talent Record (including more than one for a given event) via EM.

This feature is controlled by a new option visible in the existing system setting, “View Candidate Scoring Tab Display” within the “System: General” page of EM. The option, “Add/ View Form Button,” can be set by Super Users and user types with access to the System: General page. Current radio buttons (Legacy Fields, Open Event Form Button, Both...) are replaced with check boxes (Legacy Fields, Open Event Form Button, Add/View Form Button).

**Setting after this change**

View Candidate Scoring Tab Display	<input type="checkbox"/> Legacy Fields	<input type="checkbox"/> Open Event Form Button	<input checked="" type="checkbox"/> Add/View Form Button
Controls the content of the Scoring tab on the View Candidate page			

**Setting before this change**

View Candidate Scoring Tab Display	<input type="checkbox"/> Legacy Fields	<input type="checkbox"/> Open Event Form Button	<input checked="" type="checkbox"/> Both Open Event Form Button and Legacy Fields
Controls the content of the Scoring tab on the View Candidate page			

For existing clients, if the “Both...” value was saved, the individual values “Legacy Fields” and “Open Event Form Button” are both automatically checked.

## 24. Event Manager – Unscheduled Timeslot Entries

When a candidate is invited to an event series, an event type; All Scheduled events, the candidate is added to the “Unscheduled” timeslot of all events that meet the invitation criteria.

Previous behavior: If a candidate is removed from the Unscheduled Time Slot in one of the events, then the system removes the candidate from the unscheduled timeslots in all the other events in that series. In the History tab of that candidate record in Event Manager, there will be one entry for the removal from each individual event.

Current behavior: If a candidate is removed from the Unscheduled Time Slot in an event, this is one action. The candidate will be removed from all of the events but there would be only one entry in the candidate history in Event Manager for that action. If the original invitation was for an event series, then the Event Series Name would be displayed in the Event column of the History grid for the one entry. If the original invitation was for an event type, then the Event Template Name would be displayed in the Event column of the History grid for that one entry.

In addition, the description in the Notes column was using the generic "Deleted from Event" note. Starting this release, when the deletion is from the Unscheduled Time Slot, the note would say "Deleted from Event's Unscheduled Time Slot". This change would only apply when the deletion is from the Unscheduled Time Slot. Any deletions from actual time slots would continue to say "Deleted from Event".

## 25. RAM – Warning Messages

The RAM warning messages will be modified as the following to display the threshold dynamically, where “y” is the threshold. For a single client DB, the threshold is 250 triggers, while for a multi-client DB it is 50.

**Warning:** If you plan on creating more than 25 rules or 50 actions within a rule, please follow up with RAM subject matter experts prior to this trigger creation to ensure your configuration is appropriate. If you ignore this threshold and this trigger causes performance problems, the trigger will be automatically disabled.

**Warning:** This is trigger #xx, which is beyond the common threshold of ##y. Please follow up with RAM subject matter experts to ensure your configuration is appropriate. If you ignore this threshold and this trigger causes performance problems, the trigger will be automatically disabled.

## 26. BrassRing Talent Gateways – Accessibility Compliance LDP 256

Changes to bring BrassRing Talent Gateways into compliance with IBM's corporate accessibility standards are on-going. The following changes have been made to Talent Gateway pages for Release 14.0:

**Resume Submission Instructions on Talent Gateway have the following changes:**

- Current value: "Enter the text of your resume/CV in the text box below."  
New Value : "Enter the text of your resume/CV in the following text box."
- Starting this release, the word “Help” is removed from the “?Help” help icon and only “?” is displayed.
- Controls in the Privacy Question screen are grouped together in a frame for accessibility compliance.
- Color of the text in the Job Details page is altered to meet accessibility requirements.

**Document packet page launched from a link on the Candidate Portal**

The Document packet page now has a title, "Document packet information:" To navigate to this page:

1. Log in to the Talent Gateway.

2. Click the Candidate Portal link.
3. Click the Document Packet link. The document packet page launches.



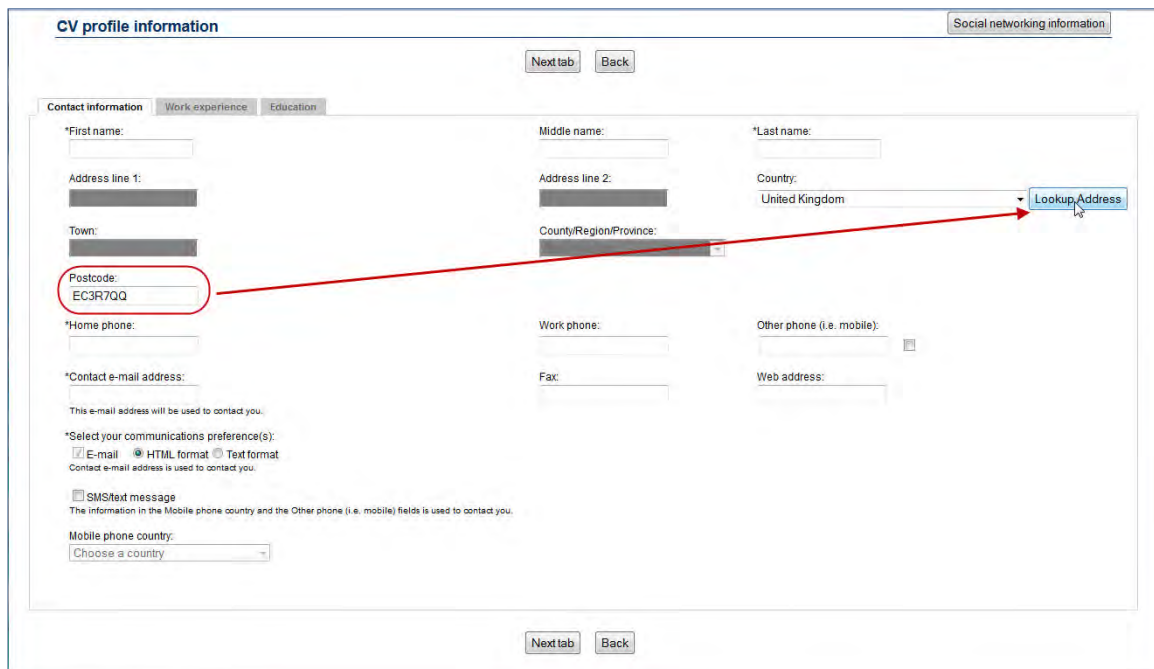
### Basic BrassRing Talent Gateway - Profile details - Addresses page

On the Addresses page accessed by entering a ZIP or Postal code and clicking the Lookup Address button, there are two visible changes:

- A new heading was added to this page.
- "Address not found" message is red, bolded, and underlined.
- A new button was added to close the page.

To navigate to the Addresses page:

1. Launch the Basic TG.
2. Select the Profile provider.
3. Enter Resume/CV details.
4. On the profile information page, enter a Postal code and select the Lookup Address button.



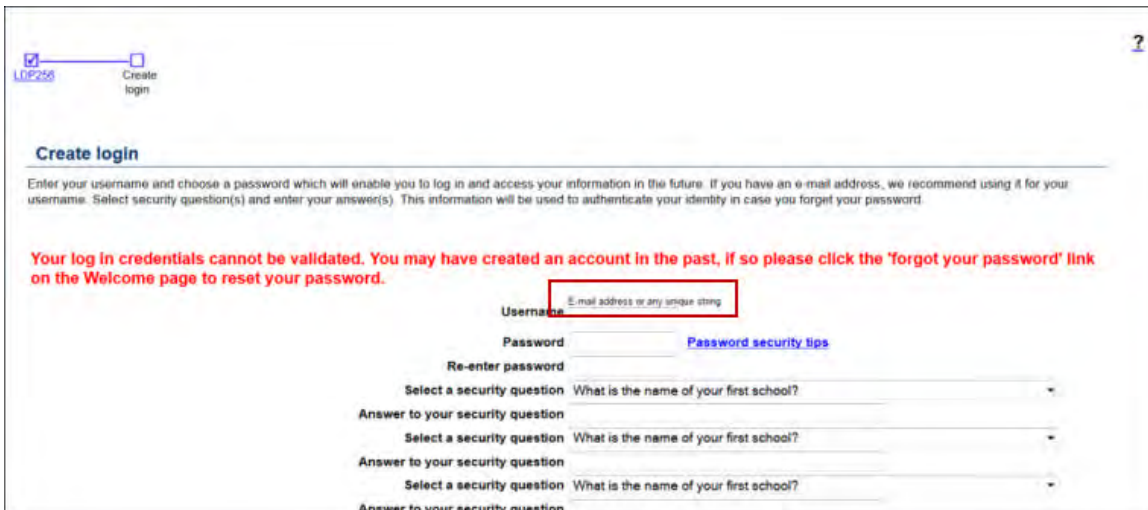
A heading was added to the top of the window; "Address not found" message is red, bold, and underlined; and a Close button has been added.



### Create Login Page

A new label "E-mail address or any unique string" is placed above the User name edit box.

The error message which is displayed up on creating a profile with an already existing user name is now displayed to the top of the section.



### Talent Gateway Log in Screen

- When users try to select the “Forgot Password” link using the keyboard, they are not taken to the corresponding screen. This is fixed as a part of the accessibility compliance.
- The “Forgot Password” screen displays an additional line which is removed. The color of the text messages is changed to meet accessibility compliance.
- The Resume/CV Manager screen now has all the controls grouped into a frame. Similarly, the Cover letter upload options are added to the frame for accessibility compliance.
- The cover letter upload screen on the BrassRing Talent Gateways has the following enhancements to be accessibility compliant:

- The cover letter upload options with radio buttons did not have a label previously. A new label **Select One** is added.
- When the second option of typing or copy/pasting a cover letter is selected by a candidate, a text field with a label is displayed. The label is updated from “the text box below” to “this text box”
- The profile maker selection page in BrassRing Talent Gateway has the following changes to for accessibility compliance:
  - A new frame is added which encloses all the profile making options in this screen.
- The font color of the caution message that is displayed on the assessment order page when a candidate accesses an assessment via the Talent Gateway is altered to meet the accessibility compliance requirements.

### **Forgot user name? Workflow**

For “Forgot user name?” workflow, changed error message to "Either Home phone or Email address must be entered. Please try again."

### **Cover Letter Upload**

The cover letter upload screen on the BrassRing Talent Gateways has the following enhancements to be accessibility compliant:

- The cover letter upload options with radio buttons did not have a label previously. A new label **Select One** is added.
- When the second option of typing or copy/pasting a cover letter is selected by a candidate, a text field with a label is displayed. The label is updated from “the text box below” to “this text box”

## **27. Social Media – Accessibility Enhancements**

The BrassRing application and BrassRing Talent Gateways have screens where users or candidates share requisition information on available social media websites. These screens have the following enhancements to be accessibility compliant:

- Each of the check boxes now has a label with the name of the social media website along with the existing icon.
- The text preceding the text box that indicated the number of characters of the message is now replaced with a button with the label “Update Message Length”.
- Assessments – Accessibility Enhancements

In order for the instructions to be accessibility compliant, the instructions on the **Assessment Order Request** page are updated.

Existing Instructions:

Or, you may copy/paste the following URL into a document to save and launch the assessment at a later period of time.

Instructions:

1. Right click on the text box below and choose 'Select All'
2. Right click and choose 'Copy'

### **New Instructions:**

**Or, you may copy and paste the following URL into a document to save and launch the assessment at a later period of time.**

The Assessment System is currently unavailable. Use transaction ID [ 19046BR ] for error reporting.

Please [click here](#) here to retry to launch your assessment.

Or, you may copy and paste the following URL into a document to save and launch the assessment at a later period of time.

### 28. Go Button for Page Refresh

A **Go** button now appears on the following pages where changing the selection on a drop-down list refreshes the page.

- BrassRing Post to My Social Networks page – BrassRing users see Go button following the list of Talent Gateways

**Post to my Social Networks**

**AutoReqID** 19046BR

**\*Posting TG** ZV-TG

**Language** English

- Talent Gateway Home (Welcome) page – Candidate sees Go button following the language selection dropdown.

Select a language

English - US Jobs on US TG