IBM Watson Talent

BrassRing on Cloud
Quick Reference Guide

IBM

This document is designed to provide a quick reference guide for the main processes in BrassRing on Cloud. For more information about the processes in this document, see the IBM Knowledge Center.

This edition applies to IBM Watson Talent: Talent Discovery and to all subsequent releases and modifications until otherwise indicated in new editions.

Contents

Chapter 1. The BrassRing on Cloud home page

The BrassRing home page is mobile responsive and improves how you work in BrassRing. Its user experience is based on persona designation. There are five different personas: Recruiter, HR User, Hiring Manager, Reporting/Analytics, and Administrator. Each persona provides the user with the view of the data that works best for them, but the user can also personalize their view. The BrassRing Hiring menu (▤) is available for the user to work with Reqs, Candidates, Reports, Administer BrassRing, and access the BrassRing Support Community and Help.

BrassRing Highlights and Welcome Message

- **BrassRing Highlights** is used by IBM to post system messages that might include details about releases, or maintenance, etc.
- **The Welcome Message** is used by your Administrator to post a message specific to your organization.

The Home Page Tabs

- **My Open Reqs** is used to view the reqs for which the user has a **My** relationship.
- **My Approved Reqs** is used to view the approved reqs for which the user has a **My** relationship.
- **My Reqs Pending Approval** is used to view the reqs that are awaiting approval for which the user has **My** relationship.
- **My Candidates** is used to view the candidates who applied to **My Open Reqs**.
- **My Tasks** is used to view the pending approvals of reqs or candidate forms.
- **Edit Tabs** is used to edit the view of tabs to show on the home page.

Personalize Cards, Grids, Visualizations

- ⚙ **Configure display** is used to configure what fields display and in what order.

- 📊 **Visualization view** provides pictorial display of the data.

- ⊞ **Card view** presents data in a container view for Auto Req ID, Title, Division, and Manager. It also includes a link to New and Total number of candidates.

  - **New** is the number of candidates the user has not viewed.
  - **Total** represents the total number of candidates who applied to the req.

- ▤ **Grid view** displays the data in a grid view that can include up to 20 fields.

- The refresh icon (↻) refreshes the data.

Filters

Use the Filters link Filters » to narrow the list of reqs displayed on the **All Open Reqs**, **My Open Reqs**, **My Approved Reqs**, and **My Reqs Pending Approval** tabs. From the **Refine Results** section, select the field values to filter.
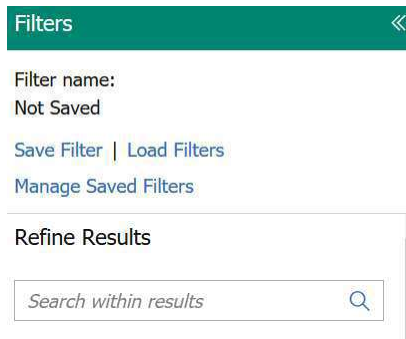
- **Save Filter** – Save the filters by adding a name and apply the saved filters in the future.
- **Load Filters** – Run your saved filters.
- **Manage Saved Filters** – Edit saved Filters.

Quick Links

The Quick Links pane can provide links to internal and external sites. Administrators can configure the default folders and links that appear for each persona.

Select the Quick Links icon () to access the Quick Links pane. Select the icon again to close the pane. You can customize the pane by adding new links and creating folders to categorize your links.

- Select **Edit Links** to edit or delete links by using the edit or delete icons (✎ ✖).
- Select **Add Link** to add a link. Enter the Name, URL, and assign a folder if needed.
- Select **New Folder** to add a new folder.

Quick Search

Quick Search is available on the home page and other internal BrassRing pages. You can use Quick Search to search for Candidates, Reqs, or Candidates in specific Reqs. Select the down arrow (⌄) to select the type of search, enter the search details, and select the magnifying glass (🔍) to run the search.

- **Candidates** searches by candidate name or search for specific skill in the candidate resume.
- **Reqs** searches specific reqs by req number or req name.
- **Candidates in Req** searches for candidates in a specific req.

Chapter 2. Talent Records

Select the **Candidate's name** to access the Talent Record from any list of candidates.

1.
   The **Actions** menu takes actions on Candidate. Select the down arrow (⊙) to expand the Actions menu.

2.
   Select the Next Page icons (● ●) to move to the next page in the top ribbon.

3. The Profile section provides access to Candidate Contact Details, Resume, Cover letter, Work Experience, Education, and Submission History.

Profile

| Contact Details | Resume | Cover letter | Experience | Education |

4. The Activity section includes:

Activity

| Action log | Job response | Forms | Attachments | Notes | HR Status | Communication | eLink |

   a. **Action Log –** any action taken on candidate

   b. **Job response –** Resume or CV and application information. Only available in view mode. Actions cannot be taken from this menu.

   c. **Forms –** any Candidate form completed

   d. **Attachments –** any attachments uploaded

   e. **Notes –** any notes added

   f. **HR Status –** any HR Status assigned

   g. **Communication –** any communication sent

   h. **eLinks –** any elinks sent. Only available in view mode. Actions cannot be taken from this menu.

5. The Filter section can filter the list by:

Filter: All ⊙

✓ All
This folder
My Reqs
My Actions

   a. **This folder –** Actions taken on the current req in which you are working.

   b. **My Reqs –** Actions that are taken in reqs you are associated with.

   c. **My Actions –** Only actions you took.

6. Use the **Search bar** to search for specific actions.

Search: [🔍]

Chapter 3. View Open Requisitions

1. Access open requisitions from:
   - The **My Open Reqs** or the **All Open Reqs** tabs on the home page.
   - By selecting **Menu** > **View all reqs** > **Open**.
   - By selecting **Menu** > **View my reqs** > **Open**.
2. From either the **My Open Reqs** or **All Open Reqs** tab on the BrassRing home page, select **Actions** and:
   a. **Add Req** to initiate a new req.
   b. **eLink Blank Req** to elink a blank req to an internal user for completion.
   c. **Export Excel** to export a list or reqs.
3. Hover over the **Req ID** to display a summary of the req details
4. Select the **Req ID** to access details of the req.
5. The Req details page displays the following buttons:
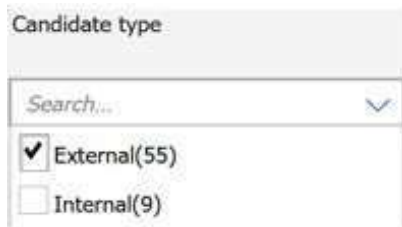
   a. **Edit** – edit req to make changes.
   b. **Hold** – place req on-hold temporarily.
   c. **Cancel** – cancel req.
   d. **More** – take other actions on req based on user privilege. Example: Close, Delete, Save as New, eLink, etc.
6. The Req details page displays the following tabs:

   a. **Details** – provides details of the req.
   b. **History** – includes all actions that are taken on the req in the past.
   c. **Attachments** – shows req specific attachments and allows user to add more.
   d. **Forms** – displays req sub-forms and allows user to add req sub-forms.

Chapter 4. Searching Candidates

Quick Search can be used to run searches on **Candidates**, **Reqs**, and **Candidates in Reqs**. Quick search is available on the BrassRing home page. Candidate searches can be run by selecting **Menu** > **Candidates** > **Search**. Candidates can be searched by adding specific criteria to standard and custom fields.
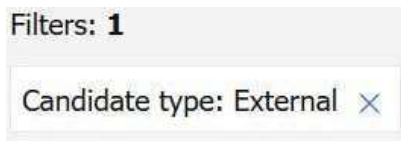
• Use the Refine Results section to add your criteria to the search. Expand the search fields by using the down arrow (⌄).

• As the filters are selected, the search results are automatically updated with candidates that match the selected criteria. For example, narrow your search results to show External Candidates only. The number of External Candidates is displayed in brackets.

  – The number of filters is added to the filtered field

  – All filters are also added to the top of the search results.

• To remove a filter, select the **X icon** (✕) for the filter, or select **Clear Current Filter** to remove all filters.

• Save searches by selecting **Save Search** and adding a name for the saved search.

• To load saved searches select **Load Filters** and select the **search name**.

• Select **Manage Saved Filters** to edit or remove saved searches.

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