

IBM Kenexa Talent Suite

Admin Application Guide
November 2020



Note

Before using this information and the product it supports, read the information in [“Notices” on page 129.](#)

This edition applies to the current release of IBM® Kenexa® Talent Suite, and to all subsequent releases and modifications until otherwise indicated in new editions.

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Chapter 1. Introduction

The IBM Kenexa Talent Suite admin application is an integrated environment platform configuration tool for all Talent Suite products. It consists of a portal from which users by using a single sign-on (SSO) to access applications, such as Hiring, Onboard, and New Hires Portal.

This document is intended for the following persona:

- Client Admin

Note: This guide is not intended for the Implementation Consultant (IC). Please refer to the IBM Kenexa Talent Suite System Configuration Guide for all Admin Application process steps.

The following table shows products and applications within the Talent Suite:

<i>Table 1. Talent Suite Products</i>	
Product Name	Applications
IBM Kenexa BrassRing on Cloud	Hiring Job Search
IBM Kenexa Onboard on Cloud	Onboard Manager, Onboard (New Hire)
IBM Kenexa Talent Suite on Cloud	Talent Suite
IBM Kenexa Lead Manager on Cloud	Lead Manager

Chapter 2. User Access to the Talent Suite

The user enters a User name and Password to gain access to the Talent Suite application via the Login screen.

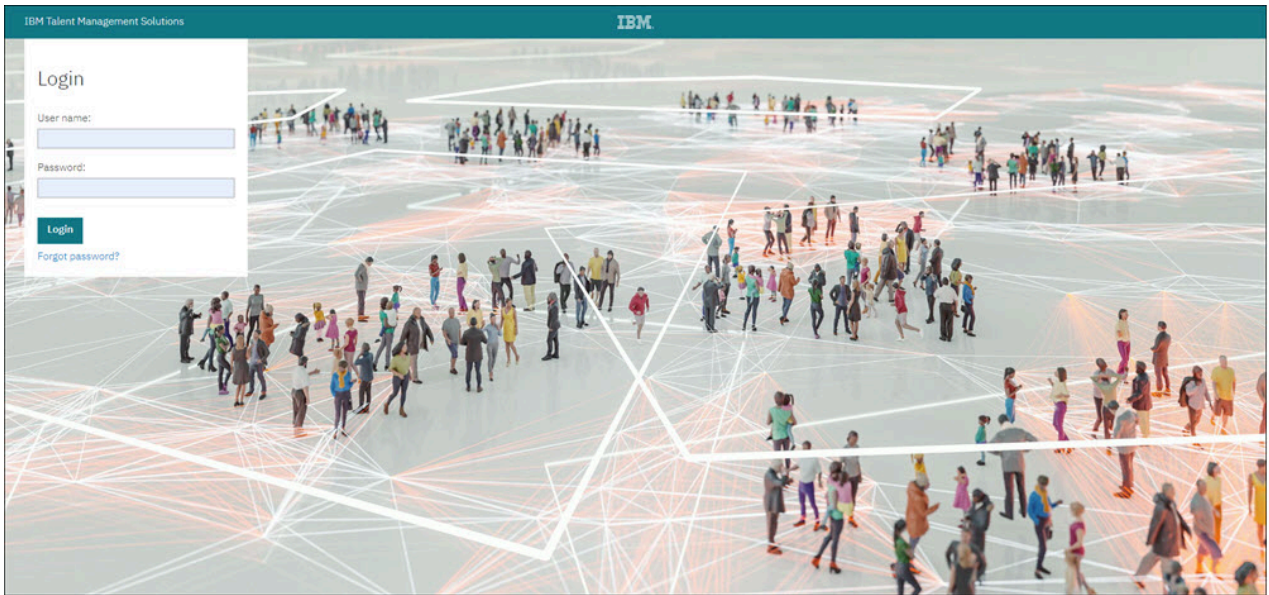


Figure 1. Login Screen

User names and passwords are case-sensitive. If entered incorrectly, the following message displays.

You entered an incorrect password or user name. Please enter your case-sensitive User name and Password.

Login



You entered an incorrect password or user name.

Please enter your case-sensitive user name and Password.

User name:

iqaUser12



Please enter your user name.

Password:

.....



Please enter your password.

Login

[Forgot password?](#)

Figure 2. Incorrect Login Message

Chapter 3. How to utilize the Admin application in the Talent Suite

The Admin application is accessed via the App Launcher just like any other Talent Suite application. A user must be licensed for the Admin application for the Admin icon to be available in the App Launcher for that user.

About this task

Granting users Admin access is described in the following procedure.

Procedure

To license a user for the Admin application use one of the following methods:

1. Use the user import .csv file to ensure these columns are present and valued:
 - TS_ADMIN_ACCESS
 - TS_ADMIN_USER_TYPE

Note: Refer to the [“User Types”](#) on page 32 section in this chapter for more information on available administrator user types.

Additional user identification columns will also be necessary depending on whether or not you are creating or updating a user.


Refer to the [“Creating and Uploading a User Import CSV File”](#) on page 38 section of the [“User Provisioning Configuration”](#) on page 35 chapter in this guide for more information on how to create/ update, and import users.

2. Utilize the Admin Manage Users screens (Add new user, or search and update an existing user) to grant administrative access by enabling the Admin application in that user's Access section and providing a valid administrative user type.

Refer to the [“Add New User Process Steps”](#) on page 23 and [“Updating an Existing User”](#) on page 16 sections in this guide for more information on how to create and update existing users.

Launching the Admin app

Upon log on to the Talent Suite,

3. Select the **Application Launcher** icon  to launch the Application Launcher navigation bar (if necessary).

Note: Licensed applications based on the user's profile display in the horizontal Application Launcher navigation bar. Forward and Backward arrows and page indicator symbols display on the scroll bar for access to additional licensed applications for users who have access to multiple applications.

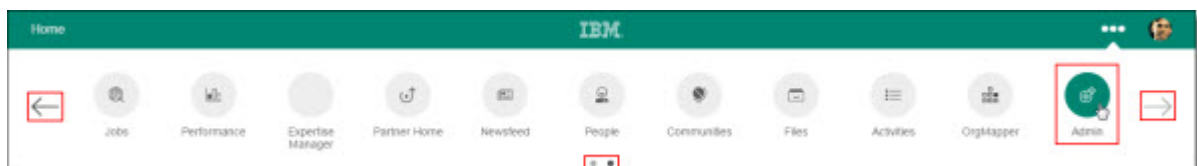


Figure 3. Admin icon on the Application Launcher Navigation Bar

4. Select the **Admin** icon on the Application Launcher navigation bar to launch the Admin application default landing page.

Note: The Admin application default landing page depends on the user's access rights. Based on the Admin Navigation menu, the first page in that list that the user has access to will be their default landing page.

Navigation

This section describes how to navigate through the Admin application in the Talent Suite.

Procedure

1. Select the Admin Application Navigation icon  to expand the available navigation options.

Tip: Selecting the Application Navigation menu icon again closes the Admin Application Navigation panel.

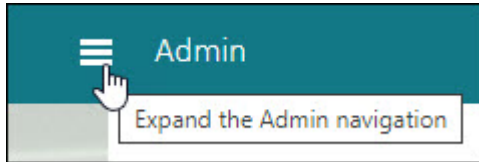
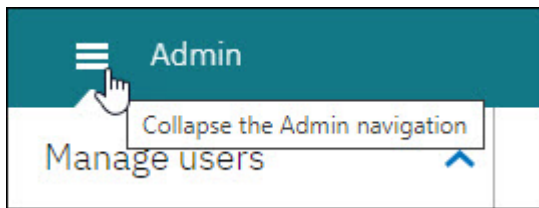


Figure 4. Admin Hamburger Navigation menu icon



2. Select the Admin link to navigate back to the Admin landing page.

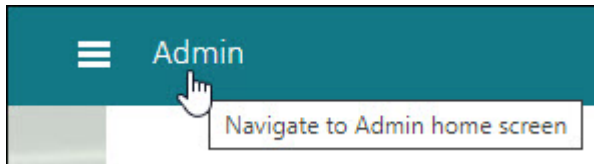


Figure 5. Select Admin icon to navigate to page

3. Select the desired link in the navigation menu pane to open that specific Admin page.

Note: Your role will determine what navigation options are available to you.

Following are the current Admin configuration functions available:

- Manage Users
 - Search Users
 - Add new user
 - Import Users
 - Export Users
- Security
 - Password Policies
 - 2-Step verification

The following table describes the function of the Admin Application Navigation panel links:


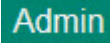
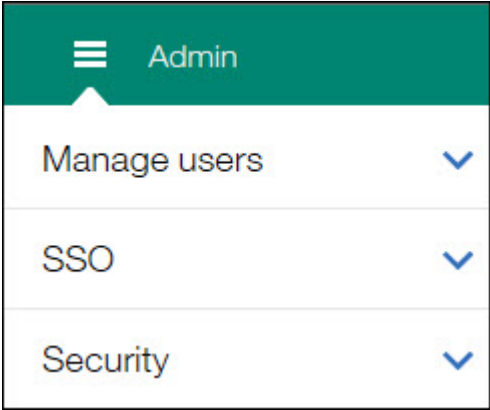
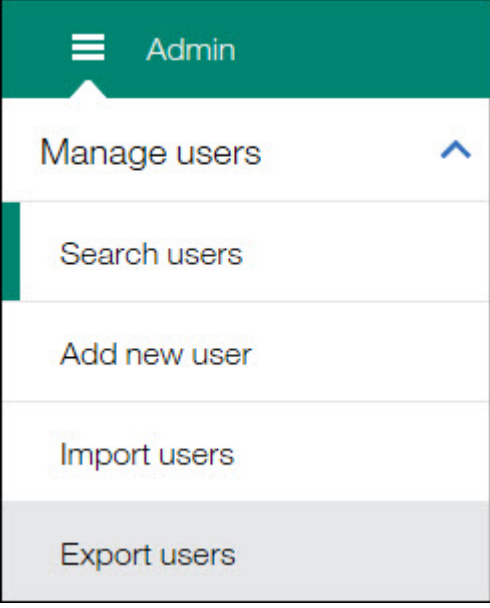
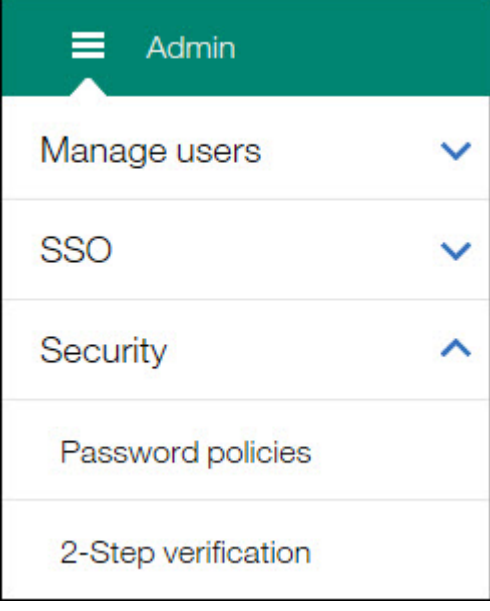
Icon	Description
	Application Navigation Menu icon Selecting the Application Navigation menu icon expands and contracts the Admin Application Navigation panel.
	Admin Root Page link Selecting the Admin link returns the user to the Admin landing page.

Table 2. Application Navigation Panel Links (continued)

Icon	Description
	<p>The Admin Application Navigation panel displays your authorized access areas.</p> <p>The following menu items are displayed (depending on authorization):</p> <ul style="list-style-type: none"> • Manage Users <ul style="list-style-type: none"> – Search Users – Add new user – Import Users – Export Users • Security <ul style="list-style-type: none"> – Password Policies – 2-Step verification • Help (When selected navigates the user to the IBM Kenexa Talent Suite Admin Application Guide page on the IBM Kenexa Smarter Workforce Knowledge Center.)
	
	

While in the Admin application, users can:

- Select the Application Launcher icon to re-launch the Application Launcher navigation bar. (Selecting an application's icon on the navigation bar opens the corresponding Talent Suite application.)
- Select the Application Navigation menu icon to open the Admin Application Navigation panel.
- Select the Admin link to return to the Admin landing page.

Chapter 4. Manage Users

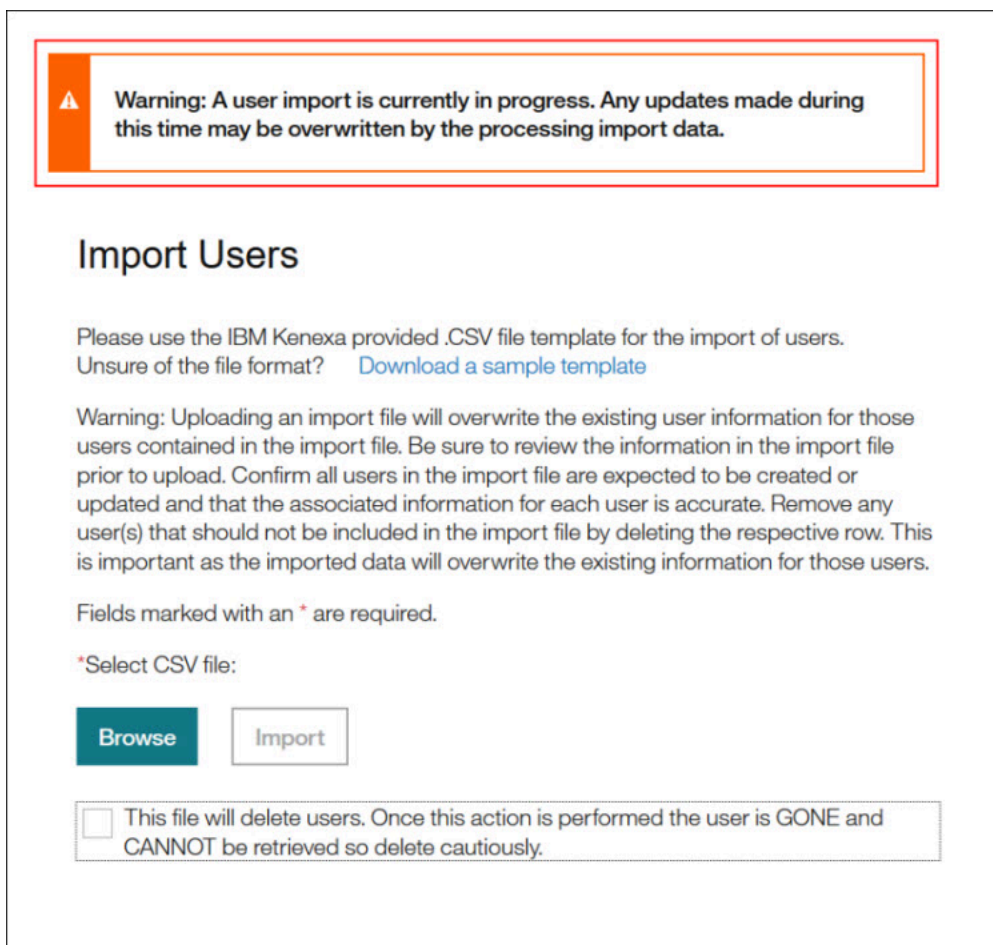
The Admin application allows the user with Admin access permissions, and the authorizing user type, to manage users in the Talent Suite.

The following sections describe specific Manage Users features.

- Search Users
- Add new user
- Import Users
- Export Users

Each screen displays a warning message when a user import is in progress. This message is to warn the user that if any updates are made while the user import is in progress that their updates may be overwritten and lost.

Warning: A user import is currently in progress. Any updates made during this time may be overwritten by the processing import data.



The screenshot shows a warning message box at the top of the 'Import Users' page. The warning message is: "Warning: A user import is currently in progress. Any updates made during this time may be overwritten by the processing import data." Below the warning, the page title is 'Import Users'. The main content area contains instructions: "Please use the IBM Kenexa provided .CSV file template for the import of users. Unsure of the file format? [Download a sample template](#)". A detailed warning follows: "Warning: Uploading an import file will overwrite the existing user information for those users contained in the import file. Be sure to review the information in the import file prior to upload. Confirm all users in the import file are expected to be created or updated and that the associated information for each user is accurate. Remove any user(s) that should not be included in the import file by deleting the respective row. This is important as the imported data will overwrite the existing information for those users." Below this, it states "Fields marked with an * are required." and "*Select CSV file:". There are two buttons: a teal 'Browse' button and a white 'Import' button. At the bottom, there is a checkbox with the text: "This file will delete users. Once this action is performed the user is GONE and CANNOT be retrieved so delete cautiously."

Figure 6. Manage Users User Import Warning Message

How to Search Users

The Search Users function allows for the search of all users in the Talent Suite.

The Search Users prompt defaults to search by the user's email address.

A warning message displays when a user import is in progress. This message is to warn the user that if any updates are made while the user import is in progress that their updates may be overwritten and lost.

Warning: A user import is currently in progress. Any updates made during this time may be overwritten by the processing import data.

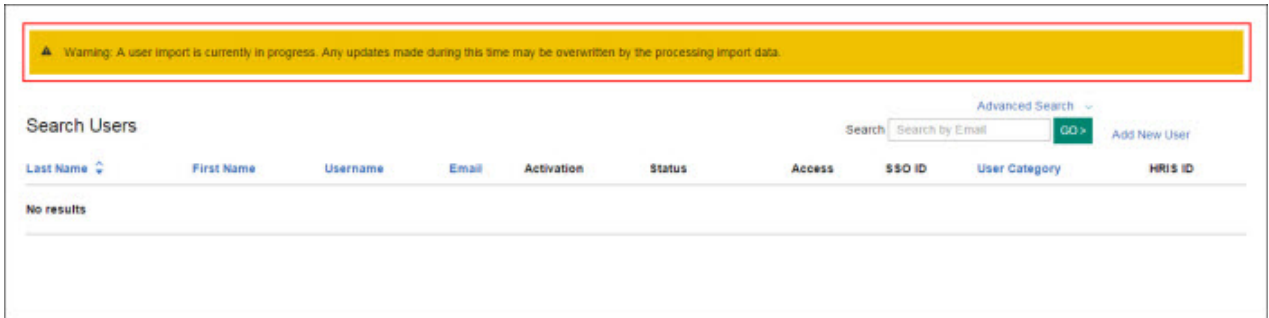


Figure 7. User Import Warning Message

Navigation

This section gives instructions to access to the Search Users Settings in the Admin application.

Procedure

Select **Search Users** in the navigation menu to launch the Search Users page shown in the following Search Users page figure.

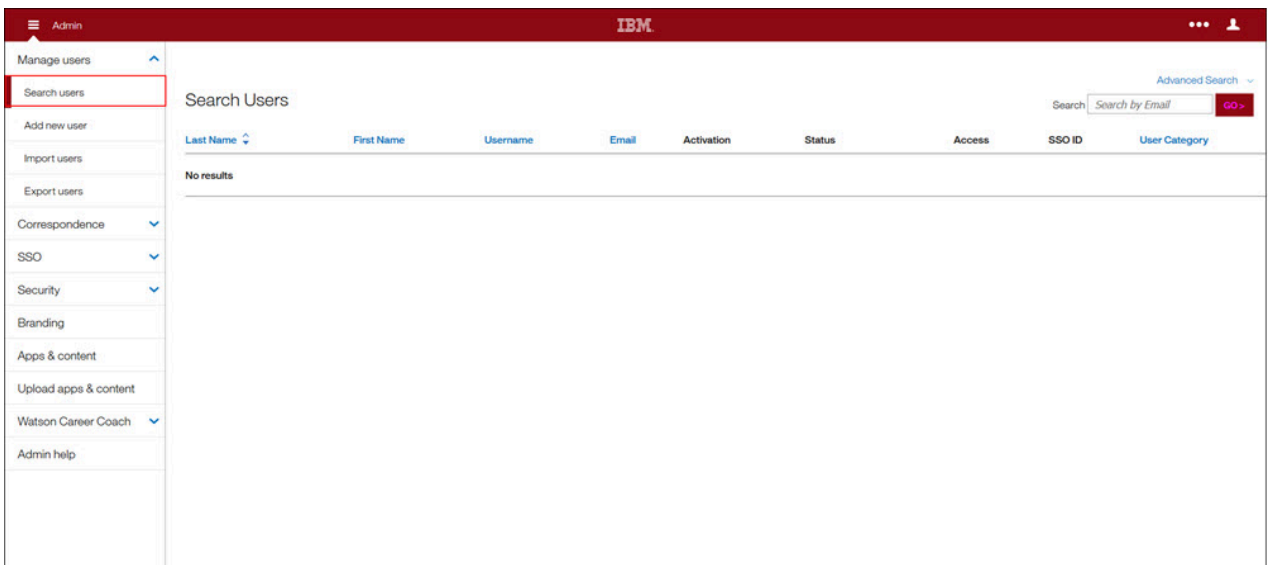


Figure 8. Search Users page

Search and Advanced Search Users Process Steps

This section describes how to perform the process steps for the Search Users function. Users access the Advanced Search link to more quickly narrow the user search results by using the following fields.

Procedure

Search Users process steps are as follows.

1. Use the **Search** field to search by email.

If an advanced search is required,

2. Select the **Advanced Search** link to initiate the Advanced Search criteria consisting of the following:

- Search by Email
- Last Name
- First Name
- Username
- HRIS ID

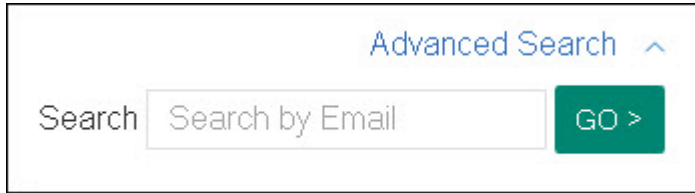


Figure 9. Advanced Search link

3. Once all Advanced Search criteria has been entered, select **GO**. Search results then display in a default column format.

Tip: Use the horizontal scroll bar at the end of the page or select the **Application Navigation** icon to collapse the Application Navigation panel to view all search results.

- Last Name
- First Name
- Username
- Email
- Activation
- Status
- Access
- SSO ID
- User Category
- HRIS ID

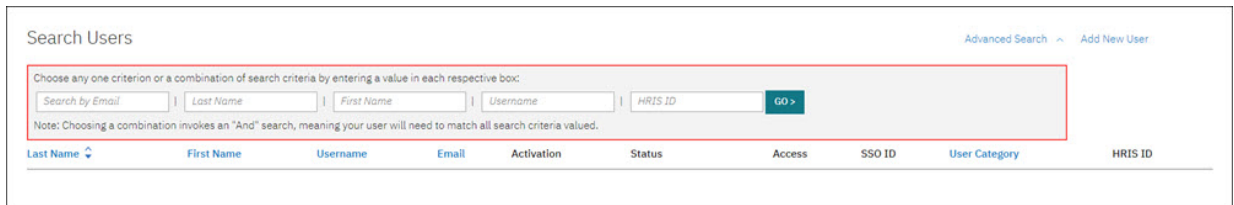


Figure 10. Advanced Search Users (criteria and search results)

User Search Results

This section describes User Search functions and results where updates to the user can be made.

About this task

When a search is performed, the results are displayed in the Search Results table (refer to the following Advanced Search User Results and Table Column Format figure for a search results example).

Last Name	First Name	Username	Email	Activation	Status	Access	SSO ID	User Category	HRIS ID
A	Aaaaaa	Aaaaaa	aaaaaa@aaa.com	Enabled Disable	-	Jobs - Internal Talent Gateway Hiring - BrassRing	d5d5492bcca4e3aa333397ed9e011e		

Figure 11. Advanced Search User Results and Table Column Format

Note: The **Last Name** column links to that particular user's details.

<i>Table 3. Search User Table Columns</i>	
Table Column	Definition
Activation	<p>Displays whether or not the user is active in the system with an associated action.</p> <p>Disabled enabled The user is currently disabled and therefore the user has no access to the Talent Suite. Selecting enable will enable the user and restore access.</p> <p>Enabled disabled The user is currently active and has access to the Talent Suite. Selecting disable will disable the user and revoke access.</p>
Status	<p>Displays the user's current condition with an associated action.</p> <p>Locked Unlock This means the user has locked their account during the login process. Selecting Unlock will send an email to the user which will provide a link that forces a password reset which will restore access.</p> <p>Expired Update The user account has expired and the user can no longer access the system. Selecting Update will provide the ability to update the expiration date for the user. This can be updated via the expiration date field on the user or the user import file as well.</p> <p>Future User Update The user has been set to have a future start date by setting a future date in the validity date field on the user. Selecting Update will provide the ability to update the validity date for the user. This can be updated via the validity date field on the user or the user import file as well. Once the validity date is reached the user will have access to the system.</p>
Access	Displays the application(s) the user is currently provisioned for.

Custom sorting is allowed for the following columns:

- **Last Name** (Sorting results are default sorted by Last Name.)
- **First Name**
- **Email**
- **Username**
- **User Category** (This drives user export filters.)

Note: Combined sorting is supported.

In-line Actions: The search results table provides the admin with the ability to update a user directly from the search results.

Procedure

To Enable or Disable a user,

1. In the Activation column, select the active link for either **Disable** or **Enable** in the Status column.

Tip: You can also change the user Status in the User Details section by selecting the user's **Last Name** link in the Last Name column.

2. If **Enable** is selected, a dialog box displays with the message Do you wish to enable this user? Clicking on Yes will enable this user., asking the administrative user to confirm the choice.
 - a) The administrative user either selects **Yes, Proceed**, to proceed to complete the change, or **Cancel** to discard the change as shown in the following figures. (Selecting **Yes, Proceed** changes the **Enable** link to display as **Enabled**.)

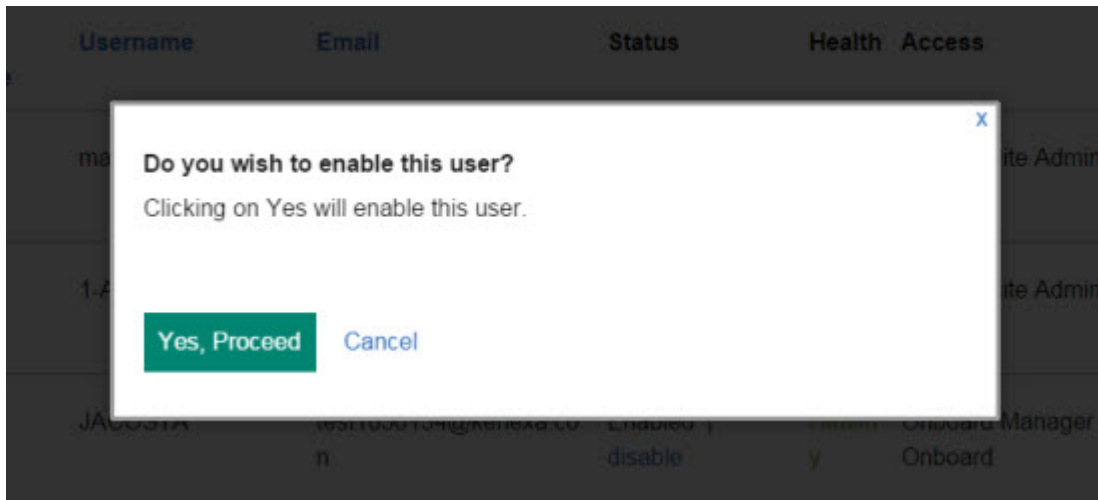


Figure 12. Enable Confirmation dialog window

Status Column Process Steps

The Status column allows the administrative user to update users by selecting the Status column's update action.

About this task

The Status column includes the following actions:

- An **Expired** user update action which allows the administrative user to update the user to a current status.
- A **Future** user update action which allows the administrative user to search for users with future validity dates.

Procedure

To update an **Expired** user in the Status column,

1. Select the **Update** link in the Status column. .

Tip: You can also change the user Status in the User Details section by selecting the user's **Last Name** link in the Last Name column.

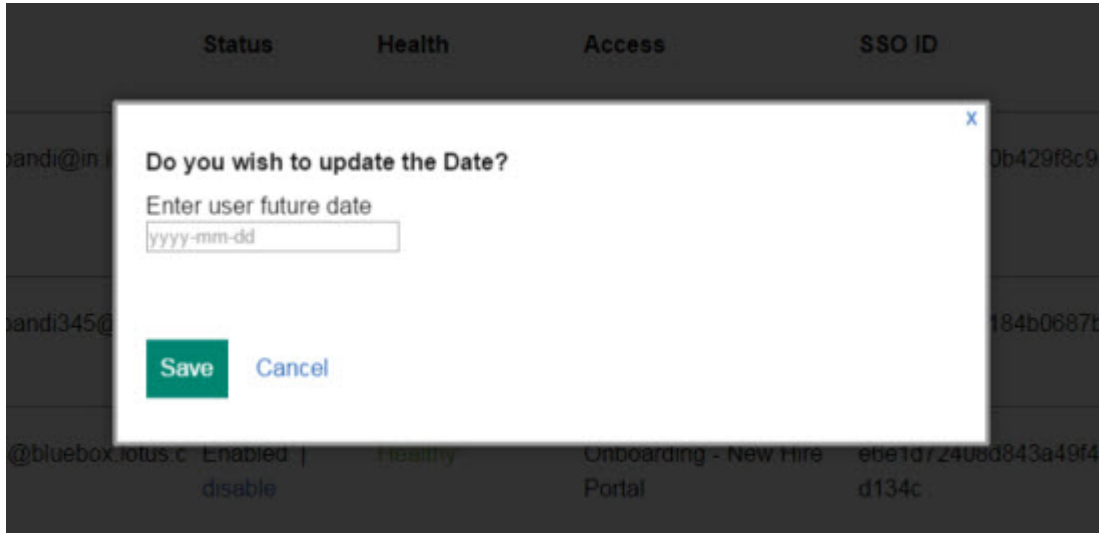
The Status column includes a **Future** user update action which allows the administrative user to search for users with future validity dates.

To update a **Future User** in the Status column,

2. Select **Update** by Future User in the Status column. A dialog box displays with the message Do you want to update the date? Enter a user future date..
3. Enter a future validity date value in the yyyy-mm-dd format in the **Enter a user future date** field.
4. Select **Save** to save the future date change or **Cancel** to exit to discard the future date change.

Note: After the date is saved, the user no longer displays as a future user.

Figure 13. Future Date Update Confirmation dialog window



Important: The validity date cannot be in the past. It must be the current date, or a future date.

Other possible Status column conditions include:

- Locked/unlock: **Locked** displays when the user account is locked. (The administrative user selects **unlock** to unlock the user account.)
- Expired/update: **Expired** displays (in red text) when the user account is expired. (The administrative user selects **update** to update the user account.)
- No Access/update: **No Access** displays when the user has no licensed applications. (The administrative user selects **update** to go to the user's Details page and update the Access section.)

Updating an Existing User

Updating and existing user allows access to the Profile and Account sections via the Last Name link.

About this task

The user can update Profile and Account information for an existing user by performing the following steps.

Important: When a user import is in progress, a warning message displays with the following message. Warning: A user import is currently in progress. Any updates made during this time may be overwritten by the processing import data.

Procedure

To update an existing user,

1. Search for the user and select the user's **Last Name** link in the Last Name column. A new page opens with the Profile and Account details for that user, and available Access applications for that user. The

Access section contains links to various Talent Suite applications. These links are either enabled or disabled for that user.

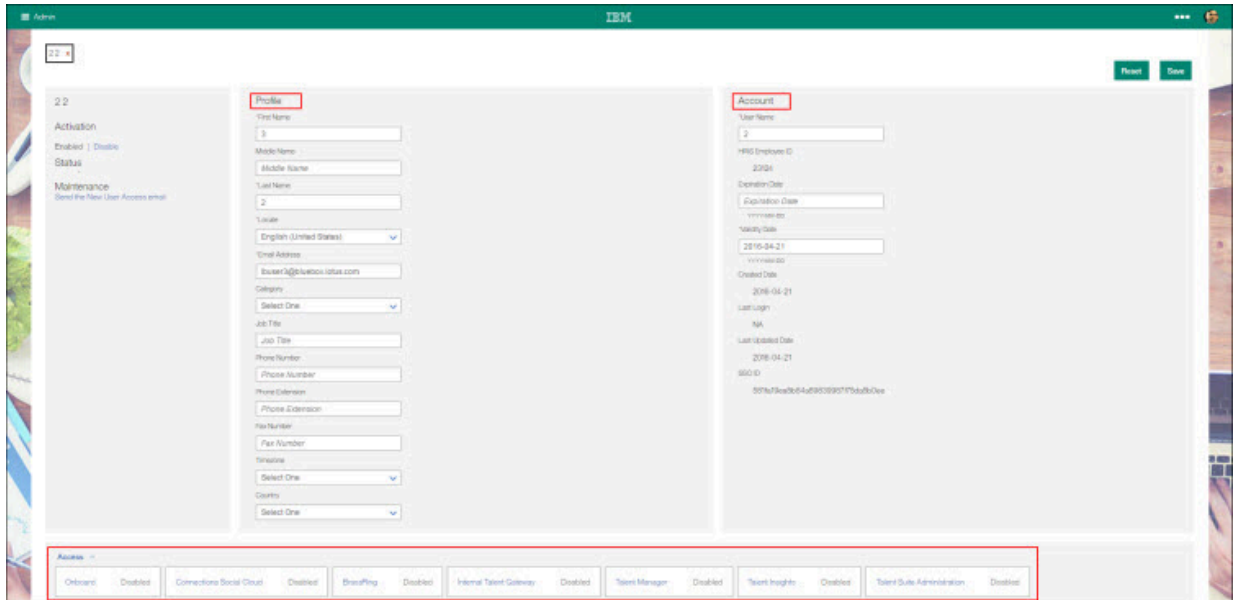


Figure 14. User Details page accessed via Last Name link

In the **Profile** section,

2. Update the user's Profile settings as needed for the following fields:

Note: Fields marked with an asterisk are mandatory fields. The Profile section displays the user's personal information, along with the ability to update the Profile settings.

- **First Name** (mandatory)
- **Middle Name**
- **Last Name** (mandatory)
- **Locale** (mandatory)
- **Email Address** (mandatory)
- **Category** (Category has a list of predefined values (such as, New Hire and Employee) and is used to differentiate between new hires and employees.)
- **Job Title**
- **Phone Number**
- **Phone Extension**
- **Fax Number**
- **Timezone**
- **Country**

In the **Account** section,

3. Update the user's Account settings as needed for the following fields:

Note: Fields marked with an asterisk are mandatory fields. The Account section displays the user Talent Suite account information, along with the ability to update the Account settings.

- **User Name** (mandatory)
- **HRIS Employee ID** (mandatory): The HRIS employee ID comes from the customer's HRIS system. (If HRIS Employee ID is populated, it is read-only. If HRIS Employee ID is blank, the user can add information.)
- **Expiration Date:** When the expiration date is reached, the user account becomes expired and the user can no longer access the suite unless the expiration date is changed to a future date. (If a user

account expires, then the Status section indicates that the user is expired. An expiration date can be deleted, and if no value is entered, then the user account never expires.)

- **Validity Date:** The Validity date is to set a future activation date. (For example, if a user is to be enabled a week after creation, set this date to a week in the future.) When the future date is reached, the system activates the user, and sends the user a new user email. The new user email contains a link for setting the password and security questions.
- **Created Date** (automatically populated): Date user account was created.
- **Last Login** (automatically populated): Date the user last logged into the account.
- **Last Updated Date** (automatically populated): Date the user account was last updated.
- **SSO ID** (automatically populated)

4. After completing all updates, select **Save**.

To change user access for a Talent Suite application,

5. Select the applicable Talent Suite Application link to expand the Access section.

Note: In the Access section, the administrator selects the applications the user has permission to access.

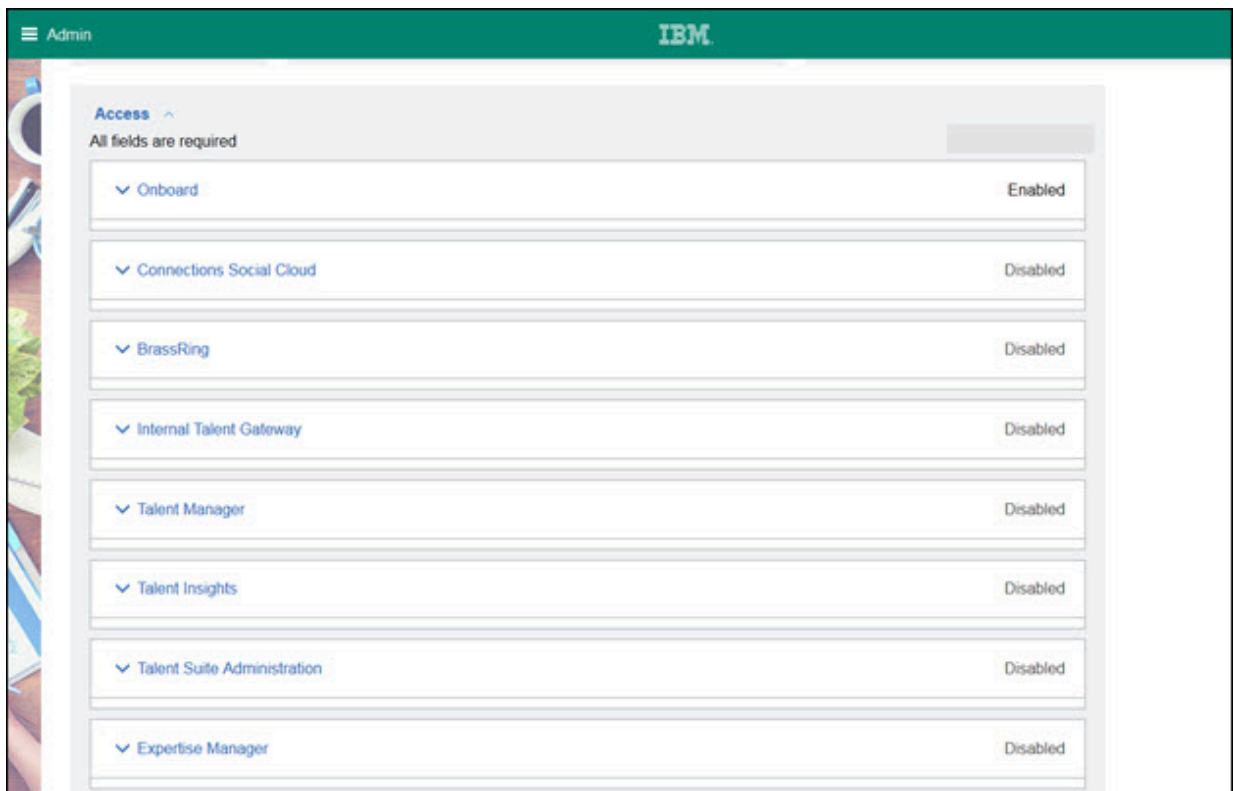


Figure 15. Access section expanded

6. Select the arrow for the desired Talent Suite application to enable or disable the user for that application.
7. Enter an appropriate value for all required fields in that application.
8. Repeat steps 4 and 5 for all applicable applications.
9. When all applicable Talent Suite applications for that user have been updated, select **Save** to save your changes or **Reset** to reset all updates back to their original status.

Add New User Function

The Add New User function allows the user to add a new user from within the IBM Kenexa Talent Suite Administration application.

About this task

The Add New User link on the Search Users page opens the Add New User page; the user can also open the Add New User page by selecting the Add New User Admin menu item. (Refer to the “[Add New User Process Steps](#)” on page 23 section for instructions for how to add a new user.)

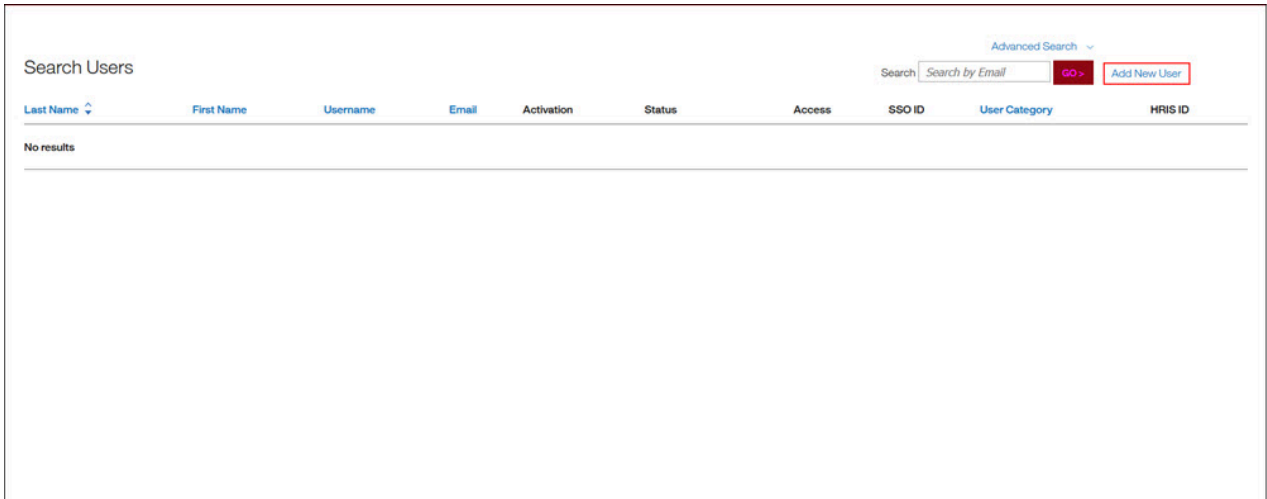


Figure 16. Add New User button on the Search Users page

Important: When a user import is in progress, a warning message displays with the following message. Warning: A user import is currently in progress. Any updates made during this time may be overwritten by the processing import data.

User Maintenance

User maintenance is performed via the Talent Suite application. This section describes various scenarios that may occur for a user.

Unlocking a User Account

The case scenario of a user locking their account is as follows:

Procedure

1. The user enters an invalid user name and password combination.
2. The user selects **Login**.
3. The user is presented with an error message.
4. The user repeats steps 1 to 3 until the Password Policy Setting: **Lock Account After** has been exceeded.
5. When the user has exceeded the number of allowed failed attempts a message is presented informing the user their account has been locked.

Options for Unlocking a User Account are as follows:

6. The locked user waits until the Password Policy Setting attribute **Account Locked For** is satisfied.

Note: The user is unaware of the wait time.

7. The locked user has a self-service option to unlock their own account through the Forgot Password workflow.

Forgot Passwords process steps are performed as follows.

To unlock the user Password,

8. Access the Talent Suite login page.
9. Select the **Forgot Password** link.
10. Enter your user name and select **Submit**.
11. Wait for the Talent Suite email in your email inbox.
12. Open the Talent Suite email and select the provided access link.
13. Create a new user account password.

How to Update Expired User Accounts

When a user's account has expired, that particular user will receive a message upon their login attempt indicating that their account has expired.

About this task

Note: Expired users no longer have access to the Talent Suite.

To update the Expiration Date of a user, please refer to the [“User Provisioning Configuration”](#) on page 35 steps in this document.

Procedure

Update the **EXPIRATION_DATE** field to a future date to reactivate the expired account.

Important: Please ensure that when updating the user account you value all other necessary fields with the most up-to-date information.

Resending the New User Email

From the user's Details screen, in the Maintenance section, you will find the option to **Send the New User Access** email.

About this task

This action is only available when the user has not yet completed their first time login workflow.

Procedure

Check the **Last Login** indicator in the Account section for verification.

- a) If the user has yet to login then you will have the option to resend the new user access email to that user.

Resetting Challenge Questions

This section describes the steps the user needs to reset their challenge questions.

About this task

The Reset Challenge Questions email function is launched from the user's Details page, in the Maintenance section, and is used when the user forgets the answers to their challenge questions.

Features include:

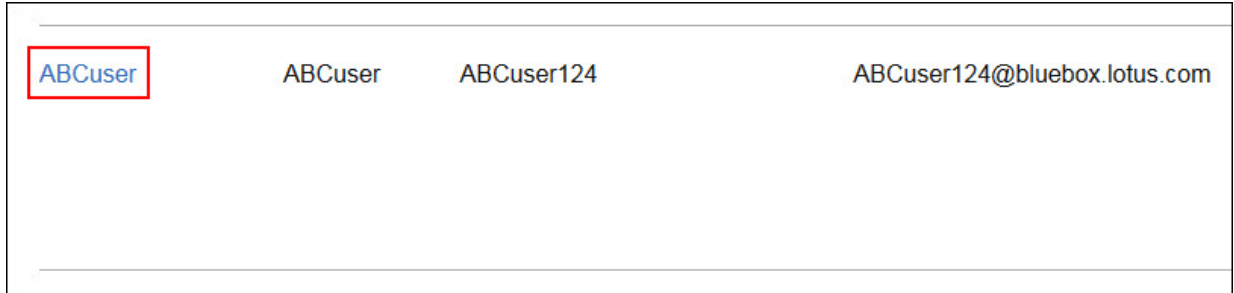
1. The Reset Challenge Questions email function only becomes available if the client has enabled the use of challenge questions.
2. The Reset Challenge Questions email function reset both the user's password and challenge questions.

Note: A user only needs to answer challenge question in the forgot password workflow. Anytime the user forgets their challenge questions they have already forgotten their password as well. Therefore this maintenance action resolves both issues by forcing the user to create a new password and also to setup new challenge questions.

Procedure

To access the user's Details page,

1. Enter the user criteria in the **Search** field on the Search Users page and select **Go**.
2. Once found, select the **Last Name** link for that user. The Details page for that user opens.



ABCuser	ABCuser	ABCuser124	ABCuser124@bluebox.lotus.com
-------------------------	---------	------------	------------------------------

Figure 17. User's Last Name link

On the User Details page,

3. Select the **Send the Reset Challenge Questions email** link. A confirmation dialog window opens with the following message: Do you wish to send the Reset User email?

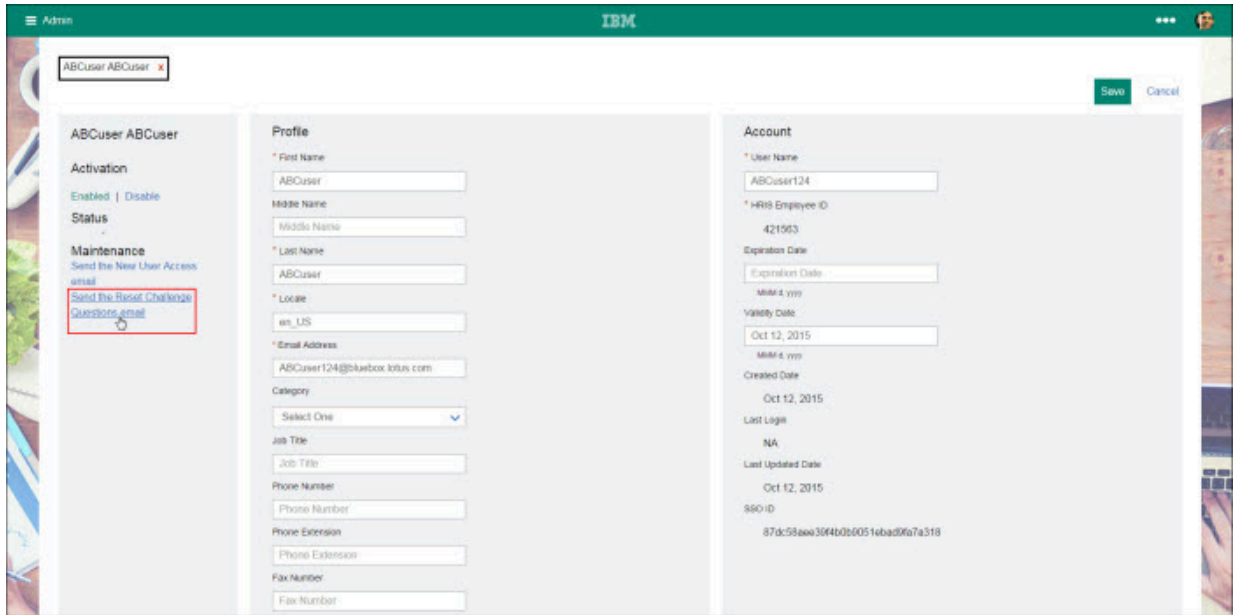


Figure 18. User's Details page

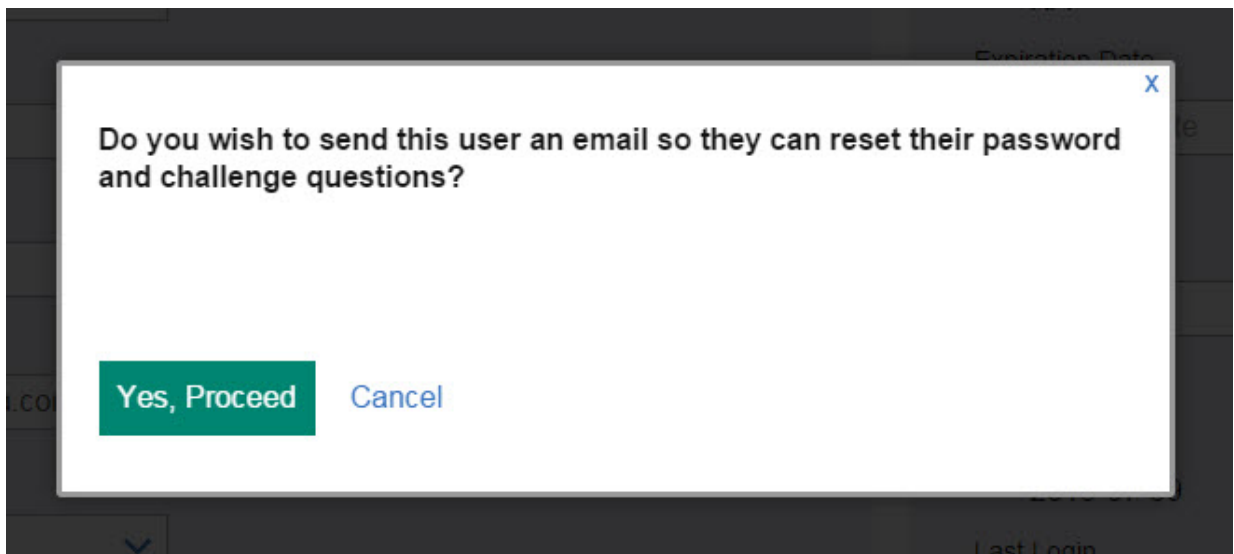


Figure 19. Confirmation Dialog Window

4. Select **Yes, Proceed** to have the system send out the Reset Challenge Questions email to the user.

How to Add New User

The Add New User function allows the user to add a new user from within the IBM Kenexa Talent Suite Administration application.

About this task

The Add New User function can be accessed via the Add New User link on the Search Users page or the Add New User Admin menu item.

A warning message displays when a user import is in progress. This message is to warn the user that if any updates are made while the user import is in progress that their updates may be overwritten and lost.

Warning: A user import is currently in progress. Any updates made during this time may be overwritten by the processing import data.

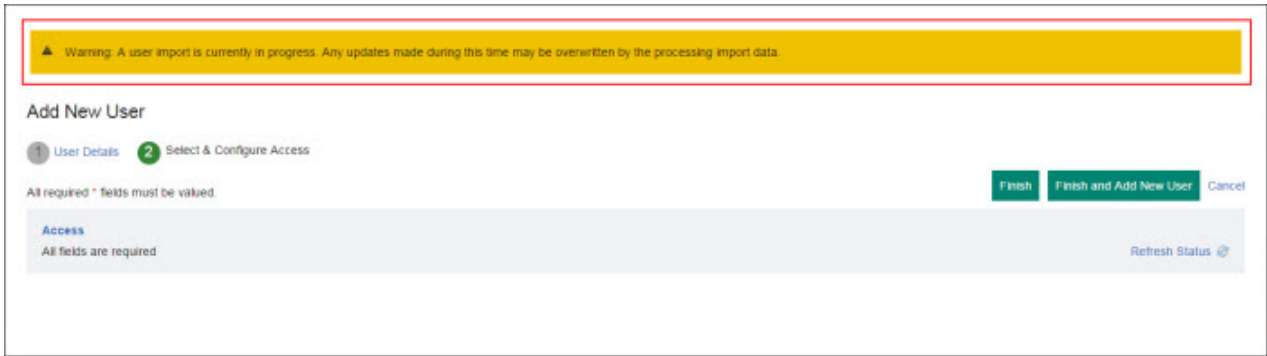


Figure 20. User Import Warning Message

Navigation

This section gives instructions on how to access the Add New User feature in the Admin application.

Procedure

Select **Add new user** in the navigation menu to launch the **Add New User** page shown in the following figure.

Note: The user can also open the Add New User page by selecting the Add New User Admin menu item. To add new users, the administrative user must be one of the following user types: Admin, Admin Manage Users, IBM Admin, or IBM Admin Manage User. (Refer to the [Add New User Process Steps](#) section for instructions on how to add a new user.)

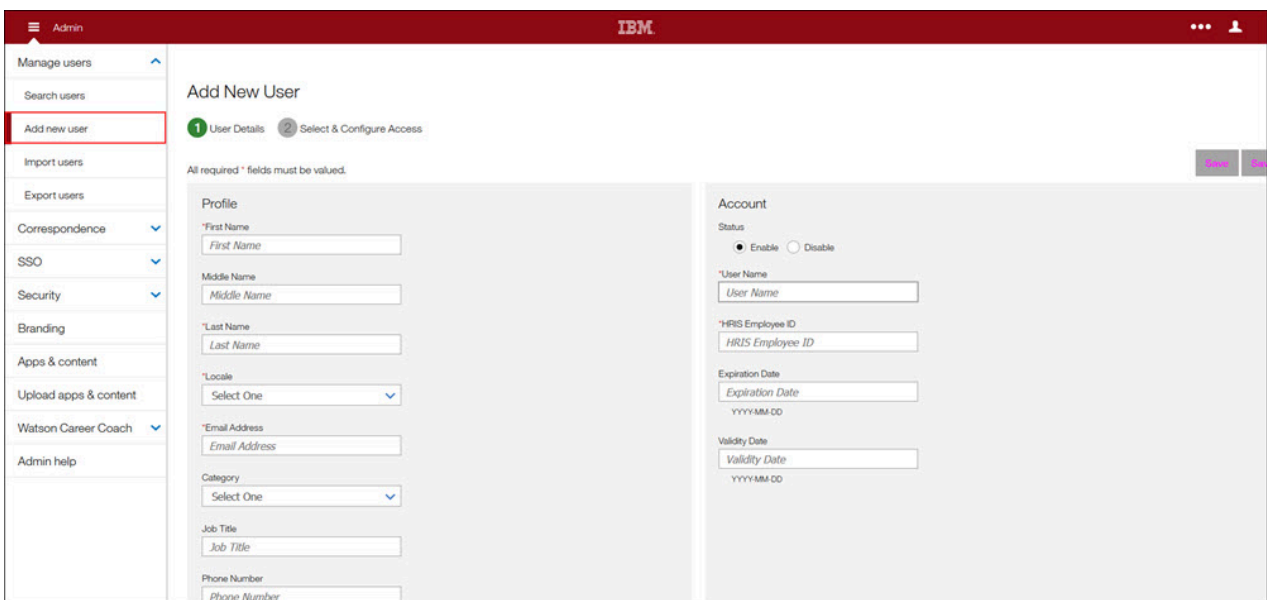


Figure 21. Add New User page

Add New User Process Steps

This section explains how to add a new user from within the IBM Kenexa Talent Suite Administration application.

About this task

Once on the Add New User landing page, the user can add User Details for the new user and Select and Configure Access for the new user.

Procedure

On the Add New User page,

1. Complete the required **Profile** and **Account** fields.

Note: Required fields are denoted with an asterisk (*).

Required **Profile** fields are as follows:

- First Name
- Last Name
- Locale
- Email Address

Required **Account** field is as follows:

- User Name
- HRIS Employee ID

The screenshot shows the 'Add New User' form with two main sections: 'Profile' and 'Account'. The 'Profile' section includes fields for First Name, Middle Name, Last Name, Locale (a dropdown menu), Email Address, Category (a dropdown menu), Job Title, and Phone Number. The 'Account' section includes a Status field with radio buttons for 'Enable' and 'Disable', User Name, HRIS Employee ID, Expiration Date (with a date format 'YYYY-MM-DD'), and Validity Date (with a date format 'YYYY-MM-DD'). Red boxes highlight the required fields: First Name, Last Name, Email Address, User Name, and HRIS Employee ID. At the top right of the form, there are buttons for 'Save', 'Save and Continue', and 'Cancel'. A message at the top left states 'All required * fields must be valued.'

Figure 22. Required Profile and Account fields

2. To save your entries and return later, select **Save**. To save your entries and continue to the next screen, select **Save and Continue**. To cancel, select **Cancel**.

If **Save and Continue** is selected, the **Select & Configure Access** page opens shown in the following figure.

Add New User

1 User Details 2 **Select & Configure Access**

All required * fields must be valued. Finish Finish and Add New User Cancel

Access
All fields are required Refresh Status ↻

Sample Generic Web Page Application	Disabled
IWR	Disabled
Lead Manager	Disabled
Learn	Disabled
Watson Candidate Assistant	Disabled
Partner Home	Disabled
Onboard	Disabled

Figure 23. Add New User - Select & Configure Access page

3. On the Select & Configure Access screen, select the applications that the new user needs to access.

Note: Applications are all disabled by default.

Following is the list of available Talent Suite applications your company has been licensed for and their fields:

Onboard (fields are as follows)

- License Status
- Hide App Tile
- OB_MANAGER_USER_TYPE
- OB_USER_GROUP
- OB_USER_LOCATIONS

BrassRing (fields are as follows)

- License Status
- Hide App Tile
- BR_APPROVAL_GROUPS
- BR_CODE_ACCESS_GROUPS
- BR_CUSTOM_APPROVAL_ROLE_ID
- BR_CUSTOM_APPROVAL_SUPERVISOR_ID
- BR_HIRING_USER_TYPE
- BR_KIP_USER_GROUP
- BR_MANAGER
- BR_ORGANIZATION_GROUP
- BR_RECRUITER
- BR_REQUISITION_PRIVILEGES
- BR_USER_GROUP
- DEPARTMENT
- SENDER_EMPLOYEE_ID

Internal Gateway (fields are as follows)

- License Status
- Hide App Tile

Talent Suite Administration (fields are as follows)

- License Status
- Hide App Tile
- TS_ADMIN_USER_TYPE

Note: Available selections for this field are dependent on the User Category selected in the Add New User **Category** field when adding a new user.

Following is an example user type list based on the IBM Category selection.

- ADMIN
- ADMIN_MANAGE_USERS
- ADMIN_SECURITY
- ADMIN_BRANDING
- Admin_Manage_Business_Partners
- Admin_Manage_Resources

- ADMIN_MANAGE_CORRESPONDENCE
- WCC_ADMIN
- WCC_ADMIN_GETTINGSTARTED
- IWJ_ADMIN

Assess (fields are as follows)

- License Status
- Hide App Tile
- ASSESS_USER_TYPE
- USER_LICENSED_ORGIDS

Select Enable or Disable for the **License Status** field.

Select the **Hide App Tile** check box if you don't want the Assess application tile to display in the Talent Suite.

Enter the user type/role in the **ASSESS_USER_TYPE** field. There are two user types associated with hierarchies: **View Hierarchy Only** and **Configure Hierarchy Only**. (Refer to the [Assess User Types/Roles](#) topic for a list of user types/roles.) You can enter more than one user type/role. To do so, use the | character. (For example, Role 1|Role 2|Role 3.)

Enter an organization unit name in the **USER_LICENSE_ORGIDS** field.

Note: This is an Org ID you entered on the Assess Hierarchy screen when creating a hierarchy. This allows you to link users to specific organizations in a hierarchy. Every client must set this field for users they create. The organization unit name needed is for the top level of access the user should have (since child access is automatic). This means you don't need to enter them all.

If a user needs access to multiple organization units but should not have the higher-level access, you can assign multiple organizations by using the | character. (For example, West Coast has Nevada,

California, Washington, and Oregon under it, and the user should have Nevada and California only. You would enter: Nevada|California.)

Myca Watson Career Coach (WCC) (fields are as follows)

- License Status
- Hide App Tile
- IBMMarketEnablements
- MYCA_USER_TYPE

Watson Candidate Assistant (WCA) (fields are as follows)

- License Status
- Hide App Tile
- WCA_USER_TYPE
Administrator

Learn (fields are as follows)

- License Status
- Hide App Tile
- LEARN_USER_TYPE

IBM Watson Recruitment (IWR) (fields are as follows)

- License Status
- Hide App Tile
- IWR_USER_TYPE
IWR_USER
IWR_ADMIN
IWR_ADVERSE_IMPACT

Watson Talent Frameworks Publisher (WTFP) (fields are as follows)

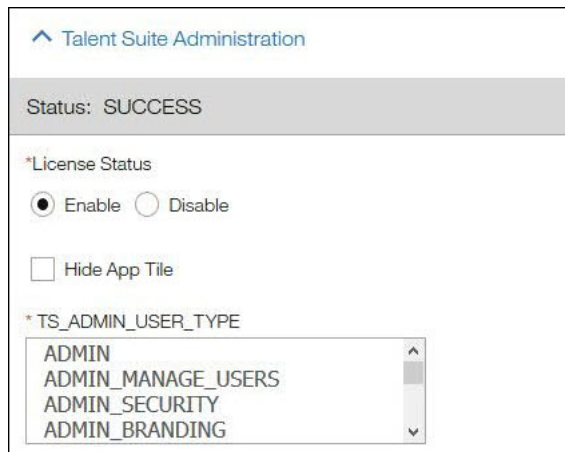
- License Status
- Hide App Tile
- TALENT_FRAMEWORKS_USER_TYPE
CONTENT_ADMIN
CONTENT_EDITOR
CONTENT_DEMO
CONTENT_CONSULTANT
CONTENT_VIEWER
IBM_PROVISIONING_ADMIN
IBM_SUPPORT
CONTENT_DEVELOPER

Note: Each application has specific fields that are specific to that application when configuring user access to that application.

To enable an application,

4. Select an application (for example, Talent Suite Administration). The application panel expands.

Note: To select more than one User Type, hold down the **Ctrl** key and make your selections.



The screenshot shows a web interface for 'Talent Suite Administration'. At the top, there is a blue header with a back arrow and the text 'Talent Suite Administration'. Below this is a grey status bar that says 'Status: SUCCESS'. The main content area is divided into sections. The first section is labeled '*License Status' and contains two radio buttons: 'Enable' (which is selected) and 'Disable'. Below that is a checkbox labeled 'Hide App Tile'. The second section is labeled '*TS_ADMIN_USER_TYPE' and contains a dropdown menu with four options: 'ADMIN', 'ADMIN_MANAGE_USERS', 'ADMIN_SECURITY', and 'ADMIN_BRANDING'. The dropdown menu is currently open, showing these options.

Figure 24. Expanded Talent Suite Administration Application panel

Tip: In the Talent Suite Administration **User Type** field, guidance text instructs the user how to enter multiple entries. Multiple values for **Talent Suite Administration** are entered as entry | |entry.

Note: The multi-entity format fields vary depending on the application selected. Applications such as Onboard and BrassRing have an asterisk between entries entry | * |entry. Talent Suite Administration does not have an asterisk between entries, just pipes.

For Talent Suite Administration,

5. Change the License Status from the **Disable** to the **Enable** option.
6. Select the **Hide App Tile** check box (if applicable). This selection will hide the application tiles from a user's view.
7. Enter an appropriate value in the **User Type** field for that application. Use pipes between multiple entries (entry | |entry).
8. To save your entries and add the new user, select **Finish and Add New User**.
9. To cancel, select **Cancel**.
10. To finish adding a new user, select **Finish**.

Note: Before selecting **Finish** on the Select & Configure page, the user can select the **User Details** link to change the Add New User information.

User Details Field Validation and Values

The User Details page has two field capabilities to prevent errors when entering data (field validations, and listed field values).

About this task

Field Validations: When an administrator creates or updates a user, field validations display if the administrator enters an incorrect value (such as, in an incorrect format, or if the Validity Date is after the Expiration Date) and attempts to save.

Listing of Field Values: When an administrator creates or updates a user, field value listings display for some fields to help the administrator provide the correct values. The administrator can select (or unselect) values as needed.

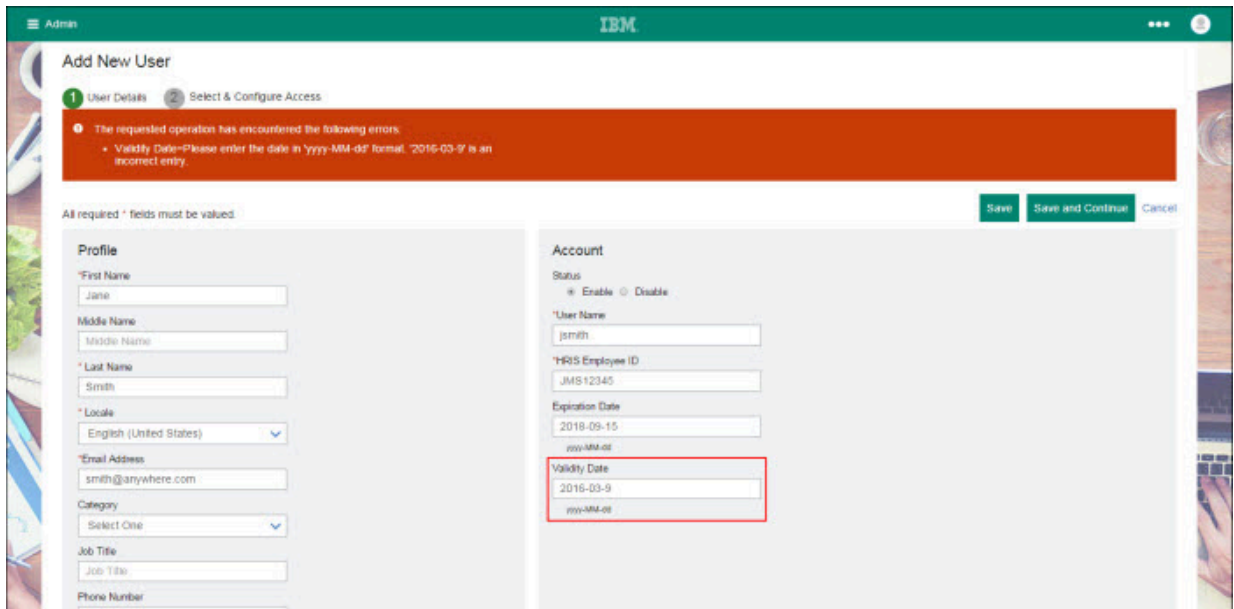
Field Validations

Procedure

- When a user is created or updated, field validations display if an incorrect value is entered in the **Validity Date** field (such as in an incorrect format, or if the **Validity Date** is after the **Expiration Date**).
- If an attempt is made to save when entering an incorrect value or format by selecting **Save** or **Save and Continue**, the validation following error message displays on the **User Details** page.

The requested operation has encountered the following errors: Validity Date=Please enter the date in 'yyyy-MM-dd' format. '2016-03-4' is an incorrect entry.

Note: The **Validity Date** field entry cannot be saved without correcting the error.



The screenshot shows the 'Add New User' page in the IBM Admin interface. At the top, there are two tabs: 'User Details' (active) and 'Select & Configure Access'. A prominent orange error banner at the top of the form area contains the message: 'The requested operation has encountered the following errors: Validity Date=Please enter the date in 'yyyy-MM-dd' format. '2016-03-4' is an incorrect entry.' Below the error message, there are three buttons: 'Save', 'Save and Continue', and 'Cancel'. The form is divided into two main sections: 'Profile' and 'Account'. The 'Profile' section includes fields for First Name (Jane), Middle Name, Last Name (Smith), Locale (English (United States)), Email Address (smith@anywhere.com), Category (Select One), Job Title, and Phone Number. The 'Account' section includes a Status dropdown (Enable/Disable), User Name (smith), HRIS Employee ID (JMS12345), Expiration Date (2018-09-15), and Validity Date (2016-03-9). The Validity Date field is highlighted with a red border, indicating the validation error.

Figure 25. Validity Date field validation error message

Note: The User Details **Account** section's **Expiration Date** and **Validity Date** fields contain guidance text to instruct the user that the correct date format is yyyy-MM-DD.

Listing of Field Values

Procedure

- When a user is created or updated, field value listings display for some fields to help provide the correct values. You can select (or unselect) values as needed. On the **User Details** screen, four **Profile** section fields include value listings in pull-down menus.

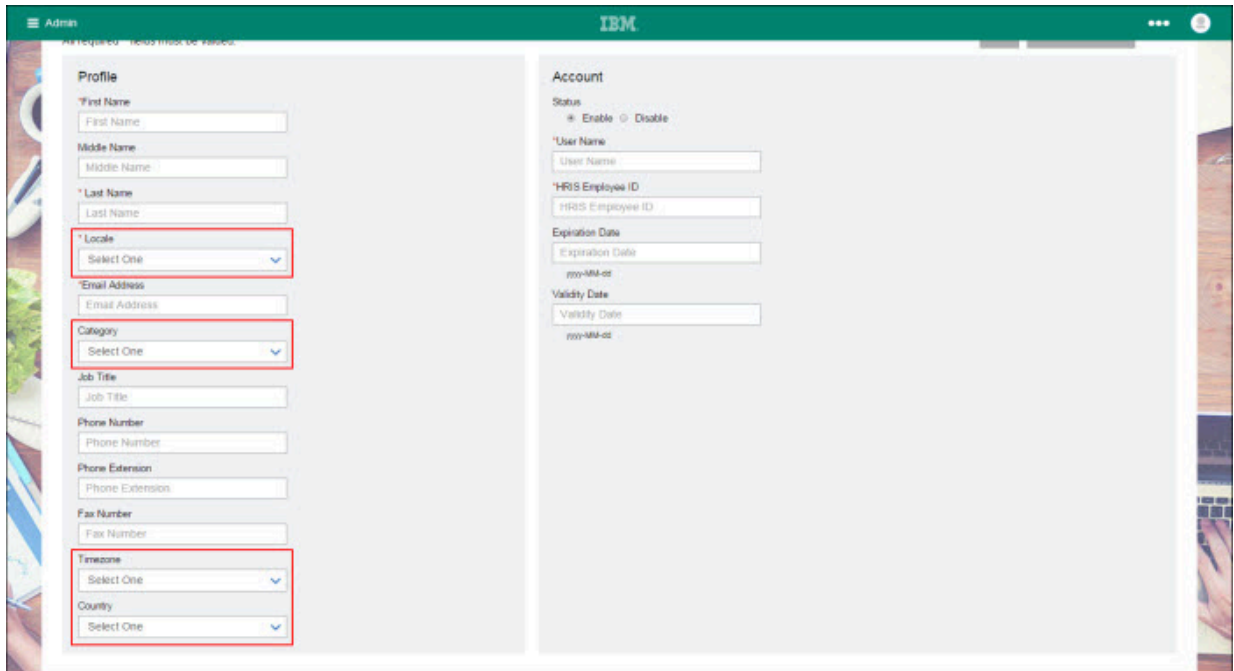
The image shows a screenshot of the IBM User Details administration interface. The interface is split into two main sections: 'Profile' on the left and 'Account' on the right. The 'Profile' section contains several input fields: 'First Name', 'Middle Name', 'Last Name', 'Email Address', 'Job Title', 'Phone Number', 'Phone Extension', 'Fax Number', 'Country', and 'Timezone'. Four of these fields are highlighted with red boxes: 'Locale', 'Category', 'Timezone', and 'Country'. Each of these highlighted fields is a pull-down menu with 'Select One' and a downward arrow. The 'Account' section includes 'Status' (with 'Enable' and 'Disable' radio buttons), 'User Name', 'HRIS Employee ID', 'Expiration Date', and 'Validity Date'.

Figure 26. Field Value Listings

Field Value Listings:

- Locale
- Category
- Timezone
- Country

Note: Each pull-down menu contains a list of correct values from which the administrator can select.

Field Value Listings (Locale):

Locale contains a list of languages and their associated locations, such as English (United States), Danish (Denmark), and Spanish (Mexico).

Field Value Listings (Category): Category contains a list of user categories.

- EMPLOYEE
- EXTERNAL
- EXTERNAL_CANDIDATE
- INTERNAL_CANDIDATE
- INTERNAL_NEW_HIRE
- MANAGER
- NEW_HIRE

Field Value Listings (Timezone):

Timezone contains a list of time zones (such as, continent/city, or Atlantic, Pacific, GMT, or UTC).

Field Value Listings (Country):

Country contains a list of countries, such as Bulgaria, Canada, Thailand, or Sweden.

User Types

User Types are the top contributors to the definition of user authorizations in the Talent Suite. User Types define the specific features and actions available to the user in the suite application.

The User Types defined in the table below belong to the Talent Suite Admin application. These User Types are static, meaning they cannot be altered.

Important: The customer should never assign a user type that has (IBM) anywhere in the name of the user type. These IBM user types are provided specifically for IBM personnel, such as Implementation Consultants or Support.

When provisioning a user for the Talent Suite Admin application, you will provide one or more of these User Types in the TS_ADMIN_USER_TYPE field.

Note: The following table specifies the available User Types and their associated access rights. You may combine User Types to provide specific access rights.

If a User Type does not specify access to a screen, then that means there is no access.

For example: The ROLE_ADMIN|ADMIN_MANAGE_USERS User Type does not include access to Password Policies.

User Type definitions and permissions are shown in the following **Customer Admin User Types** table:

Note: User Type names are case-sensitive.

<i>Table 4. Customer Admin User Types . Each User Type in this table may have multiple functions related to that one user indicated in the Access To column.</i>	
User Type Name	Access To (View/Create/Update)
ADMIN	Manage Users: Search users, Add new user, Import users, Export users
	SSO
	Security: Password Policies, Identity Source
	Branding
	Manage Email Templates
	Manage Email Correspondence
ADMIN_MANAGE_USERS	Manage Users: Search users, Add new user, Import users, Export users
ADMIN_SECURITY	Security: Password Policies
ADMIN_BRANDING	Branding
ADMIN_MANAGE_RESOURCES	Apps & Content
CT_ADMIN	Manage Email Templates
ADMIN_MANAGE_CORRESPONDENCE	Manage Email Correspondence

Assess User Types/Roles

User types used for Assess.

The user types/roles marked with an asterisk (*) can only be used for Assess in a Talent Suite environment.

Table 5. Assess Standard User Roles: Client Facing

Role	Explanation
Super User	This role has the basic functions to administer assessments but also the higher-level functions, such as creating batches, managing branding, and configuring trial tests.
General User	This role allows the user to administer tests and view results.
Create Sessions Only	This role can create sessions but cannot view results or perform any higher level tasks.
Results Only	This role only has access to view results.
Reset Sessions Only	This role can only Reset Sessions. It is intended to be paired with another role so a client can limit who has access to reset sessions. Must be used as an ADD ON ROLE.
View Hierarchy Only *	This role can be used to view a hierarchy.
Configure Hierarchy Only *	This role can create or modify a hierarchy and its associations to assessment content. Note that associations to users are performed within Talent Suite user management and require access to the Talent Suite Admin application.
Talent Suite Admin	
ADMIN_MANAGE_USERS *	For Talent Suite clients to manage users, access to the Talent Suite Admin application must be enabled and this role must be assigned within that application. Note: The Admin application has other roles available for other functions.

Table 6. Assess Standard User Roles: IBM Internal

Role	Explanation
IBM Client Support	This role is intended for client services roles (beyond GSC), so they can assist clients with questions and issues. Ideal for PMs, CSMs, and GSCA.
IBM Configuration	This role is intended for a limited set of users who need to set up and test client accounts. It contains the functionality to configure assessments and site details, plus test assessments all the way through.
IBM Consultant	This role allows the user to view assessment content and candidate results.

Table 6. Assess Standard User Roles: IBM Internal (continued)

Role	Explanation
IBM Edit Usage Tracking	This role allows internal users to view usage tracking, including setup configuration and notes, as well as update records.
IBM View Usage Tracking	This role allows internal users to view usage tracking, including setup configuration and notes.

Administering IWR Express Users

Your HR Tech representative initiates the IWR Express user management process by using file upload or the Talent Suite user management process. The IWR application uses three types: the **IWR_USER**, the **IWR_ADMIN**, and **IWR_ADVERSE_IMPACT** user type. During IWR provisioning, your HR technical representative is assigned an **IWR_ADMIN** user type which means they can use either method to administer your IWR users.

Note:

- IBM Watson Recruitment and IWR Watson Recruitment Express applications use the same IWR user types.
- All users (BrassRing included) must have an IWR user type designation to access the IWR application.

Configuring SSO

In order to administer IWR users, IWR Admins must configure Single-Sign-On (SSO) between their ATS and IWR Express and then configure IWR users in the Talent Suite. In the initial instance, this means IWROps team members work with the HR tech representative to complete this task.

Note: For information on configuring Self-Service Single Sign on for your IWR Express users, refer to the [Single Sign On \(SSO\) Configuration Guide](#).

Understanding IWR User Types

Before an IWR Admin configures their users, the IWR Admin needs to consider the responsibilities of each IWR user. There are three IWR user types in IBM Watson Recruitment Express and each user is authorized to access and perform specific tasks.

• IWR_USER

- IWR Users are able to access IWR and perform recruiter tasks in the application such as access to social listening, req priority, match score, and success score.

• IWR_ADMIN

- IWR Admin users can perform all administrative, recruiter, and configuration tasks within IWR. These tasks include configuring the IWR Trainer, social listening, all administrative functions for their instance of IWR including administering users.

• IWR_ADVERSE_IMPACT

- IWR Adverse Impact users can access, run, and view Adverse Impact reports.

Note: Both **IWR_USERS** and **IWR_ADMIN**s can be **IWR_ADVERSE_IMPACT** users. In other words, both user types can have dual roles.

Administering IWR Users

Initially, client's HR tech representative is responsible for administering their IWR users in the Talent Suite. When SSO is configured the Admin can then access **Manage Users** in the Talent Suite application.

Refer to the [Manage Users](#) section of the *Talent Suite Admin Application Guide* for detailed instructions on managing Talent Suite Users.

When configuring your users in Talent Suite, use this table when designating IWR user types. Remember, both IWR Users and Admin can hold the dual user type role of Adverse Impact.

<i>Table 7. IWR User Types</i>		
User Types (case sensitive)	Description	Dual Role?
IWR_USER	IWR Users are able to access IWRe and perform recruiter tasks in the application such as access to social listening, req priority, match score, and success score.	Yes
IWR_ADMIN	IWR Admin users can perform all administrative, recruiter, and configuration tasks within IWRe. These tasks include configuring the IWR Trainer, social listening, all administrative functions for their instance of IWRe including administering users.	Yes
IWR_ADVERSE_IMPACT	IWR Adverse Impact users can access, run, and view Adverse Impact reports.	Yes

User Provisioning Configuration

User provisioning is the creation, update, and removal of user accounts and access. HRIS and other customer systems can be leveraged to automate this process.

About this task

Automated User Imports

Note: The current import process does not support user provisioning for any Business Partner applications including the sample Business Partner applications and cannot be used to enable Business Partner users.

The Talent Suite possesses the ability to automate the provisioning of users such that the user data is managed via your system of record.

Procedure

1. Batch Integration – You will construct a .csv file of user data.

This .csv file contains the information for users you intend to create or update. IBM will provide an SFTP location for which to drop the file. Once the file is available then IBM Professional Services (PSE) will post the user data to the Talent Suite at an agreed upon interval between 1 and 24 hours.

2. Real Time Integration (web service) – You may send XML via a web service to an IBM endpoint.

Note: Additional delivery methods and file transformations may be available for an additional cost. Please consult with **IBM Kenexa Professional Services** for more details.

Importing Users through the UI

User provisioning into the Talent Suite via Import Users is done via a comma-separated value (.csv) file. Any spreadsheet program, or other editor capable of handling .csv files, may build and complete the necessary fields to generate this file.

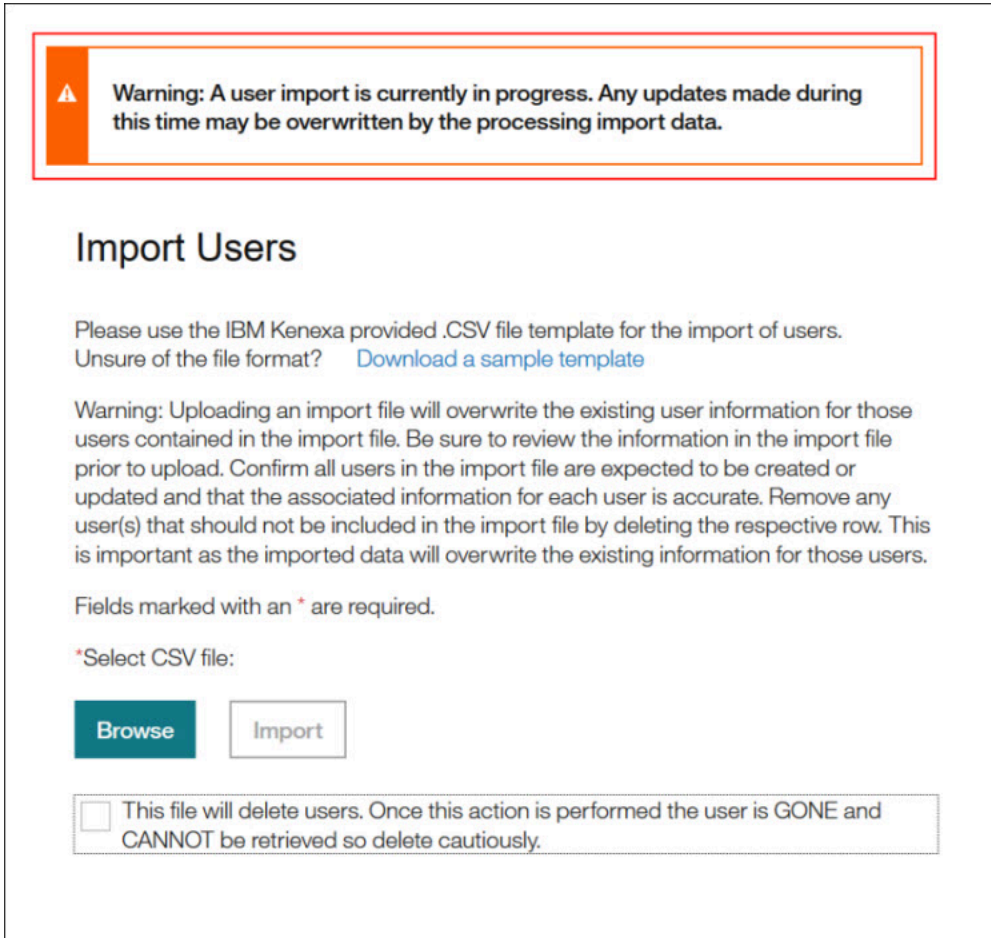
The Import Users feature is capable of both creating and updating users. No differentiation between create or update is necessary. Once the .csv is uploaded the Talent Suite will process the file and if the user information provided in the .csv can be matched to an existing user then it will update that user with any new values. (If no match can be found then a new user will be created.)

Specific User Import/Export settings are configured for the Talent Suite as described in the following sections.

Important: Any encoding of the user import file MUST be in UTF-8. (Refer to the [“Editing CSV Files in Excel”](#) on page 64 section for instructions.)

A warning message displays when a user import is in progress. This message is to warn the user that if any updates are made while the user import is in progress that their updates may be overwritten and lost.

Warning: A user import is currently in progress. Any updates made during this time may be overwritten by the processing import data.



The screenshot shows a warning message at the top: "Warning: A user import is currently in progress. Any updates made during this time may be overwritten by the processing import data." Below the warning is the "Import Users" section. It includes instructions to use the IBM Kenexa provided .CSV file template, a link to "Download a sample template", and a detailed warning about overwriting existing user information. It also states that fields marked with an asterisk are required. There is a section for selecting a CSV file with "Browse" and "Import" buttons. At the bottom, there is a checkbox option: "This file will delete users. Once this action is performed the user is GONE and CANNOT be retrieved so delete cautiously."

Figure 27. User Import Warning Message

Navigation

This section describes navigation to download the User Import sample template used to create the CSV file.

Procedure

Select **Import Users** in the navigation menu to launch the Import Users page shown in the following figure.

The following Import Users configuration options are available:

- Download a sample template

- Browse (to select the .csv file)

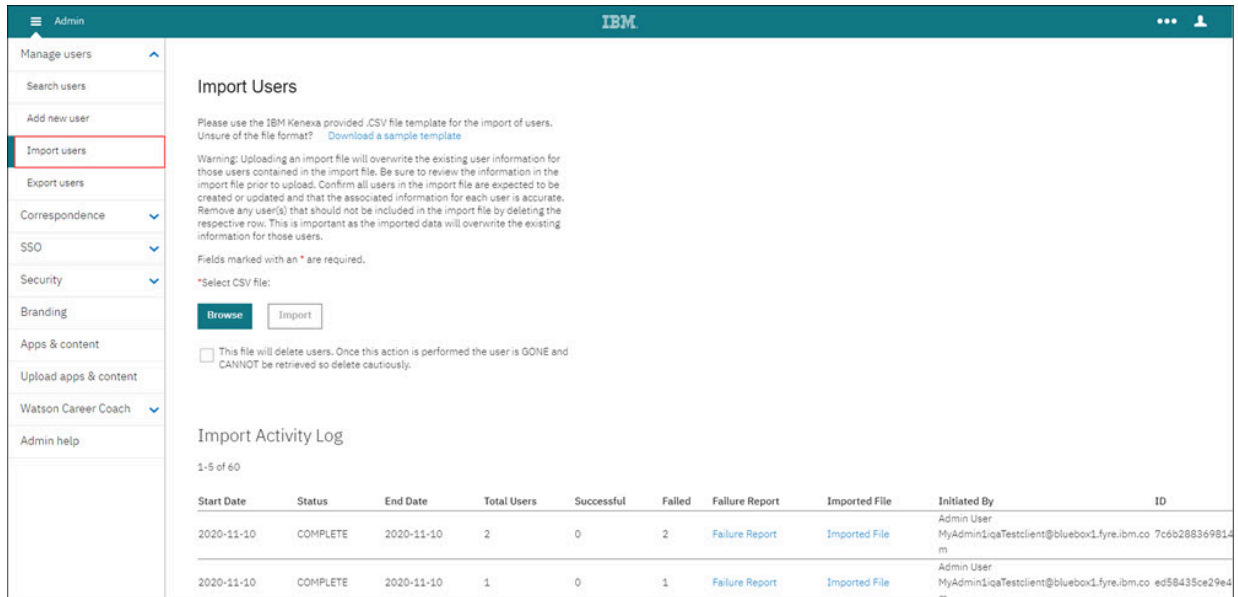


Figure 28. Admin - Import Users page

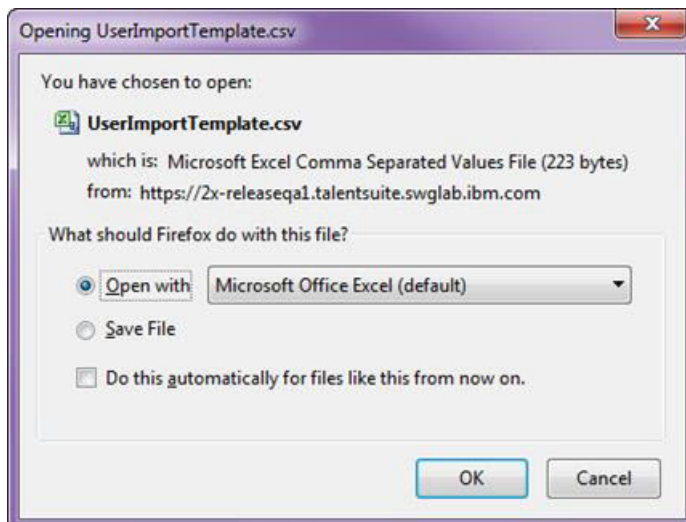
Download a Sample Template

This section provides steps to download the sample template.

Procedure

On the User Import page,

1. Select the **Download a sample template** hyperlink to open the Opening UserImportTemplate.csv dialog box.



2. In the **Opening UserImportTemplate.csv** dialog box, select either **Open with** or **Save File**.
 - a) When selecting the **Open with** option, select **Microsoft Office Excel (default)**; then save to the desired location.
3. Select **OK**.

Creating and Uploading a User Import CSV File

This section describes how to create and upload a User Import .csv file.

The shared Talent_Suite_User_Import_Master_CSV_sample.csv file that has the latest production version of the import CSV is located at the following location:

<https://w3-connections.ibm.com/files/app/file/1f50086a-9d1b-4f51-8a2f-e8cd1843f017>.

Refer to the configuration steps in the following sections for CSV file creation process steps.

[“Considerations and Assumptions” on page 38](#)

[“User Import process steps” on page 39](#)

Considerations and Assumptions

This section defines considerations and assumptions for creating and uploading users.

On user create there is a set of common required fields when creating a new user.

• Required columns on a create:

- FIRST_NAME
- LAST_NAME
- EMAIL
- USER_NAME
- HRIS_EMPLOYEE_ID
- LOCALE

Note: The ACTIVE field will default to true on create.

The customer may choose to completely remove any optional column from the import file on a create, with no issue.

The customer may pass optional columns with no value.

The new user email will send only after all applications have completed their processing.

On user update:

If a user is being updated then the only required value is HRIS_ID. (This is used to uniquely identify the user.)

On an update, the initial validation will only check for HRIS_ID.

The customer may choose to completely remove any column except for HRIS_ID on an update, with no issue.

The customer only needs to send column values they wish to update. (If columns are sent with blank values then no update is made to the users for those columns.)

If a value is intended to be erased/blanked out from the user, then the marker <null> is sent as the value.

Following are considerations and assumptions for creating, uploading and importing users.

Fields with multiple input values are delimited using |*| or |. (Refer to the specific field description to determine which syntax to use.)

The use of commas and ampersands in the file is supported.

Data fields containing a value with a comma will need to have the entire value quoted (such as, "Smith, Jane Smith").

Data fields containing a value with an ampersand do not need to have the value quoted.

If special characters (á, é, í, ó, ú, ü, ñ) are included in the .csv file, the file must be encoded as UTF-8

For example: A user belongs to two organizational groups, Global and Standard. In the BR_ORGANIZATION_GROUP field, you would enter Global|*|Standard.

For True/False input conventions, 0 = False and 1 = True (unless explicitly stated in the field column).

For the Required field in the following table, Y = Yes and N = No

Fields using the BR, OB, TM, and TI prefixes are only utilized when entering a value in their respective ACCESS.

Note: If you do not enter a value for this field, then none of the related fields are required. (Refer to the following respective tables for more information.)

Uniqueness for an employee is determined by HRIS_EMPLOYEE_ID.

Note: Any update to the user's HRIS_EMPLOYEE_ID will result in a new account created.

Uniqueness for an external candidate being imported into the Talent Suite for the first time is HRIS_EMPLOYEE_ID + SSO_ID.

HRIS_EMPLOYEE_ID will be new and unique.

SSO_ID will be existing and provided by the Onboarding module during the new hire export.

User import error handling dealing with duplicate rows in a user import file:

When encountering duplicates: A duplicate is defined as a row that has the same HRIS_EMPLOYEE_ID or USER_NAME as another row.

The FIRST row in the file is used when there are duplicate rows. Any subsequent rows are marked as a duplicate and not processed, with an indicator of the row that it is a duplicate of.

The error in the failure report (populated in USER_ERROR column) reads as follows: This row has not been processed because it has been detected as a duplicate of row [#] field name [HRIS_EMPLOYEE_ID or USER_NAME].

When there are duplicates that duplicate both the HRIS_EMPLOYEE_ID and USER_NAME fields, the **HRIS_EMPLOYEE_ID** field takes precedence in the error.

User Import process steps

This section describes the CSV file creation process for the User Import process into the Talent Suite.

Procedure

Create or update users in the Talent Suite by creating a row for every intended user.

HRISID

HRISID is not present on user records where only the New Hire license is present. When updating a New Hire record with additional applications, HRIS is provided for the first time by matching on the SSOID.

SSOID

The Talent Suite system automatically creates a unique SSOID when a user is created. It is used on import to update users (as with HRSID) and has to be included when updating New Hires since New Hire records do not have an HRSID.

Note: This is not related with Single Sign On (SSO).

Common User Fields

Procedure

Create and/or update Common User fields using the specifications in the following table.

Table 8. General User Import CSV Column Specifications. Create and/or update Common User fields using the specifications in the General User Import CSV Column Specifications table.

Column Header	Required on Create	Required on Update	Required on Delete	Description	Max Character Count	Value Format	Example
HRIS_EMPLOYEE_ID	Yes	Yes	Yes	This is the unique identifier of the user in the Talent Suite. Note: Once it is set, it can NEVER be updated. It MUST always be sent for the user.	15	Alphanumeric (case sensitive)	HRSYS1234
USER_NAME	Yes	No	No	Username associated with the user. This is a unique identifier for each user. Note: You cannot have more than one user with the same username in the same client.	255	Alphanumeric	jwtaylor
FIRST_NAME	Yes	No	No	First name of the user. Note: BrassRing has the 30 character limit.	30	Alphanumeric	John

Table 8. General User Import CSV Column Specifications. Create and/or update Common User fields using the specifications in the General User Import CSV Column Specifications table. (continued)

Column Header	Required on Create	Required on Update	Required on Delete	Description	Max Character Count	Value Format	Example
LAST_NAME	Yes	No	No	Last name of the user. Note: BrassRing has the 30 character limit.	30	Alphanumeric	Smith
EMAIL_ADDRESS	Yes	No	No	Email address associated with the user. Note: + or # are NOT valid characters. DO NOT use them.	255	Standard email address format.	Jwsmith@email.com

Table 8. General User Import CSV Column Specifications. Create and/or update Common User fields using the specifications in the General User Import CSV Column Specifications table. (continued)

Column Header	Required on Create	Required on Update	Required on Delete	Description	Max Character Count	Value Format	Example
LOCALE	Yes	No	No	<p>The language ID of the user.</p> <p>Note: If a locale is not provided, the user will fail.</p> <p>If a locale is provided and one of the applications is not configured for it, the user will fail and tell you which application needs to be updated.</p>	5	<p>ISO Locale Code.</p> <p>Supported ISO Locales for Talent Suite</p> <ul style="list-style-type: none"> • (en_US) English (United States) • (en_GB) English (Great Britain) • (de_DE) German • (it_IT) Italian • (es_ES) Spanish (Spain) • (es_MX) Spanish (Mexico) • (fr_FR) French • (fr_CA) French Canadian • (zh_CN) Chinese • (zh_TW) Chinese (Traditional) • (cs_CZ) Czech • (nl_NL) Dutch • (ja_JP) Japanese • (ko_KR) Korean • (pl_PL) Polish • (pt_PT) Portuguese • (pt_BR) Portuguese (Brazil) • (ru_RU) Russian • (th_TH) Thai • (da_DK) Danish • (hu_HU) Hungarian • (hr_HR) Croatian • (el_GR) Greek • (ro_RO) Romanian 	en_US

Table 8. General User Import CSV Column Specifications. Create and/or update Common User fields using the specifications in the General User Import CSV Column Specifications table. (continued)

Column Header	Required on Create	Required on Update	Required on Delete	Description	Max Character Count	Value Format	Example
ACTIVE	No	No	Yes	<p>Status of the Talent Suite user.</p> <p>This value will default to 1 (active).</p> <p>Note: If this value is set to 0 (inactive), the user will be active in the downstream applications but all access to the Talent Suite will be disabled.</p> <p>In order to make the user inactive in the downstream applications refer to the app ACCESS columns.</p>	1	<p>1 or 0</p> <p>On delete, the value MUST be set to 0.</p>	0
DELETE_USER	No	No	Yes	<p>This column must only exist, if all the users in this table should be deleted.</p>	N/A	<p>The value must be Yes for all users in the table.</p> <p>(Column not allowed for Create and Update)</p>	Yes

Table 8. General User Import CSV Column Specifications. Create and/or update Common User fields using the specifications in the General User Import CSV Column Specifications table. (continued)

Column Header	Required on Create	Required on Update	Required on Delete	Description	Max Character Count	Value Format	Example
MIDDLE_NAME	No	No	No	Middle name of the user. Note: BrassRing has the 30 character limit.	30	Alphanumeric	William
PHONE_NUMBER	No	No	No	Phone number of the user.	50	Alphanumeric	123-123-4567
PHONE_EXTENSION	No	No	No	Extension of phone number.	10	Alphanumeric	321
JOB_TITLE	No	No	No	Job Title of the user.	50	Alphanumeric	Accountant
COUNTRY	No	No	No	Country/ geographical location of the user.	3	ISO ALPHA3 Country Code	USA
FAX_NUMBER	No	No	No	Fax number of the user.	40	Alphanumeric	123-123-4568
TIMEZONE	No	No	No	Timezone of the user in UTC format.	9	UTC Format	UTC05:00

Table 8. General User Import CSV Column Specifications. Create and/or update Common User fields using the specifications in the General User Import CSV Column Specifications table. (continued)

Column Header	Required on Create	Required on Update	Required on Delete	Description	Max Character Count	Value Format	Example
EXPIRATION_DATE	No	No	No	The expiration date of the user. Note: Once expired, the user will no longer have access to the Talent Suite. If no value is set, the user will never expire.	20	YYYY-MM-DD	30000101
VALIDITY_DATE	No	No	No	The validity date of the user. (Indicates when the user becomes enabled, this date may be set in the future.) Note: The user cannot log in until the validity date is passed. If no value is set, it defaults to the current date.	20	YYYY-MM-DD	20000101

Table 8. General User Import CSV Column Specifications. Create and/or update Common User fields using the specifications in the General User Import CSV Column Specifications table. (continued)

Column Header	Required on Create	Required on Update	Required on Delete	Description	Max Character Count	Value Format	Example
SSO_ENABLED	No	No	No	<p>Indicator of whether a user is SSO enabled or not.</p> <p>1= true 0= false</p> <p>If this field is not present or not valued in the CSV file, the value will default to what is set on the client level.</p> <p>For example:</p> <p>If the client is SSO enabled, all users are SSO enabled unless specified otherwise.</p> <p>The only time this field needs to be valued is if the client is SSO enabled, however, the user being created needs to log in to the Talent Suite.</p>	1	1 or 0	0

Table 8. General User Import CSV Column Specifications. Create and/or update Common User fields using the specifications in the General User Import CSV Column Specifications table. (continued)

Column Header	Required on Create	Required on Update	Required on Delete	Description	Max Character Count	Value Format	Example
DEPARTMENT	No	No	No	The department of the user in both BrassRing and Talent Manager.	50	Alphanumeric	Accounting

Table 8. General User Import CSV Column Specifications. Create and/or update Common User fields using the specifications in the General User Import CSV Column Specifications table. (continued)

Column Header	Required on Create	Required on Update	Required on Delete	Description	Max Character Count	Value Format	Example
USER_CATEGORY	No	No	No	<p>This field sets a category on the user.</p> <p>This is used when distinguishing users for exports.</p> <p>When a New Hire completes Onboard Start, they will appear in the UI with the user category of NEW_HIRE.</p> <p>When a New Hire becomes a system user, the user category should be set to EMPLOYEE in the CSV file so that the user will export as an employee instead of a new hire.</p> <p>The other categories available are for the client's discretion. Setting the value to</p>	18	<p>Case Sensitive.</p> <p>It MUST be one of the following values:</p> <ul style="list-style-type: none"> • NEW_HIRE • EMPLOYEE • EXTERNAL • EXTERNAL_CANDIDATE • INTERNAL_CANDIDATE • INTERNAL_NEW_HIRE • MANAGER <p>Note: When managing users, you may see some users with the Category of IBM. This denotes IBM users and this value can ONLY be set by IBM.</p>	EMPLOYEE

Table 8. General User Import CSV Column Specifications. Create and/or update Common User fields using the specifications in the General User Import CSV Column Specifications table. (continued)

Column Header	Required on Create	Required on Update	Required on Delete	Description	Max Character Count	Value Format	Example
SEND_PASSWORD_EMAIL	No	No	No	<p>This field allows for the first time login email to be suppressed on create if the client chooses to not send it.</p> <p>Set the value as True or 1 to send the email as expected, or False or 0 to suppress the email.</p> <ul style="list-style-type: none"> If the value is True but the user fails, has a validity date in the future, or is an SSO enabled user, the user will still not receive the email. If a user is updated and SEND_PASSWORD_EMAIL = True, and if the user has not 	1	1 or 0	0

BrassRing Hiring Fields

Procedure

To provision a user for the BrassRing Hiring application, follow the instructions in the BrassRing Hiring Fields table.

Table 9. BrassRing Hiring Fields. Provision a user for the BrassRing Hiring application by following the instructions in the BrassRing Hiring Fields table.

Column Header	Required on Create	Required on Update	Description	Max Value Format Character Count	Example
BR_HIRING_ACCESS	Yes	No	<p>This field determines whether or not the user is provisioned for BrassRing in the Talent Suite.</p> <p>Note: This field is only required if you are trying to provision the user for BrassRing.</p> <p>This field supports the following states:</p> <p>ACTIVE = User is active in the system and will have access to the application through the Talent Suite. (We also support [1] for this state.)</p> <p>INACTIVE = User is inactive in the system and will not have access to the application through the Talent Suite. (We also support [0] for this state.)</p> <p>ACTIVE_NO_ACCESS = User is Active in the system but will not have access to the application through the Talent Suite.</p> <p>Note: The ACTIVE_NO_ACCESS state is how the Talent Suite now supports the BR_EXPRESS_USER scenario.</p>	Alphanumeric. (Not case sensitive.)	ACTIVE

The following fields only apply when you are provisioning a user for access to the BrassRing application.

Column Header	Required on Create	Required on Update	Description	Max Value Format Character Count	Example
BR_HIRING_USER_TYPE*	Yes	No	User type of the user in BrassRing. Note: *This field name changed, it was previously called BR_USER_TYPE.	255 Alphanumeric. (Case sensitive.)	Hiring Manager
BR_USER_GROUP	Yes	No	User group of the user in BrassRing. Note: User Groups are used when utilizing the systems Resume Security feature. The values MUST already exist in BrassRing. Multiple user groups for the user are separated by * . (Each * counts as 3 characters towards the max character count.)	255 Alphanumeric. (Case sensitive.)	Standard Group * Group_2

Table 10. BrassRing Hiring Fields used for provisioning a user for access to the BrassRing application. Use this table when provisioning a user for access to the BrassRing application. (continued)

Column Header	Required on Create	Required on Update	Description	Max Value Character Count	Format	Example
BR_ORGANIZATION_GROUP	Yes	No	<p>Required only if Org Groups are being used by the client.</p> <p>Organizational Group the user belongs to. Org Groups control a user's access to Communications, Req Templates, Talent Gateways and Agency Manager.</p> <p>The values MUST already exist in BrassRing.</p> <p>Multiple org groups for the user are separated by * . (Each * counts as 3 characters towards the max character count.)</p>	2000	numeric. (Case sensitive.)	Global * Standard
BR_APPROVAL_GROUPS	No	No	<p>This identifies the user as a form Approval.</p> <p>The values MUST already exist in BrassRing.</p> <p>Multiple approval groups for the user are separated by * . (Each * counts as 3 characters towards the max character count.)</p>	255	numeric. (Case sensitive.)	HR_VP * COO

Table 10. BrassRing Hiring Fields used for provisioning a user for access to the BrassRing application. Use this table when provisioning a user for access to the BrassRing application. (continued)

Column Header	Required on Create	Required on Update	Description	Max Value Character Count	Format	Example
BR_CODE_ACCESS_GROUPS	No	No	Code Access Groups can be configured in order to minimize the number of job codes that a user has to search through when creating a new Requisition. The values MUST already exist in BrassRing. Multiple code access groups for the user are separated by * . (Each * counts as 3 characters towards the max character count.)	255	Alphanumeric. (Case sensitive.)	Code1 * Code2
BR_KIB_USER_GROUP	No	No	This identifies the user's Kenexa Interview Builder User Group. The values MUST already exist in BrassRing. Multiple KIB user groups for the user are separated by * . (Each * counts as 3 characters towards the max character count.)	255	Alphanumeric. (Case sensitive.)	Administrator * Deity
BR_MANAGER	No	No	Defines if the user is a manager in BrassRing.	1 or 0		1
BR_RECRUITER	No	No	Defines if the user is a recruiter in BrassRing.	1 or 0		1

Table 10. BrassRing Hiring Fields used for provisioning a user for access to the BrassRing application. Use this table when provisioning a user for access to the BrassRing application. (continued)

Column Header	Required on Create	Required on Update	Description	Max Value Character Count	Format	Example
SENDER_EMPLOYEE_ID	Yes	No	A valid Employee ID for a user that exists in both BrassRing and Talent Manager for the integration to work.	50	phanumeric.	HRXMLUSER
BR_REQUISITION_PRIVILEGES	No	No	Assigns a Req Privilege to a user. The Client MUST be configured for Req Privileges and the value MUST exist in BrassRing.	4000 (Case sensitive.)	numeric.	Legal
BR_CUSTOM_APPROVAL_ROLE_ID	No	No	Assigns the user to Smart Approval. The Client MUST be configured for Smart Approval. Note: It will take 24 hrs. for the user to appear in the Smart Approval section in BrassRing.	200	phanumeric.	SA Manager
BR_CUSTOM_APPROVAL_SUPERVISOR_ID	No	No	Assigns the user to Smart Approval. The Client MUST be configured for Smart Approval. Note: It will take 24 hrs. for the user to appear in the Smart Approval section in BrassRing.	40	phanumeric.	103

Onboard Hiring Manager Fields

Procedure

To provision a user for the Onboard Hiring application, follow the instructions in the Onboard Hiring Fields table.

Table 11. Onboard Hiring Manager Fields. Use this Onboard Hiring Manager Fields table when provisioning a user for the Onboard Hiring application.

Column Header	Required on Create	Required on Update	Description	Max Value Format Character Count	Example
OB_MANAGER_ACCESS	Yes	No	<p>This field determines whether or not the user is provisioned for Onboard in the Talent Suite.</p> <p>Note: This field is only required if you are trying to provision the user for Onboard.</p> <p>This field supports the following states:</p> <p>ACTIVE = User is active in the system and will have access to the application through the Talent Suite. (We also support [1] for this state.)</p> <p>INACTIVE = User is inactive in the system and will not have access to the application through the Talent Suite. (We also support [0] for this state.)</p> <p>ACTIVE_NO_ACCESS = User is active in the system but will not have access to the application through the Talent Suite.</p>	Alphanumeric. (Not case sensitive.)	ACTIVE

The following fields only apply when provisioning a user for the Onboard Manager application.

Column Header	Required on Create	Required on Update	Description	Max Value Character Count	Format	Example
OB_MANAGER_USER_TYPE*	Yes	No	User type of the user in Onboard. The value MUST already exist in Onboard. Note: *This field name changed. It was previously called OB_USER_TYPE.	255	Alphanumeric. (Case sensitive.)	Hiring Manager
OB_USER_GROUP	Yes	No	User group of the user in Onboard. The value MUST already exist in Onboard. Multiple user groups for the user are separated by * . (Each * counts as 3 characters towards the max character.)	255	Alphanumeric. (Case sensitive.)	Standard Group * Update Group
OB_USER_LOCATION	No	No	Sets the location of the user in Onboard. The value passed MUST be the EntryAlphaKey of the location found in Onboard.	4000	Alphanumeric. (Case sensitive.)	Local

Admin Application Fields

Procedure

To provision a user for the Talent Suite Admin application, follow the instructions in the Admin Application Fields table.

Table 13. Admin Application Fields. Use the Admin Application Fields table when provisioning a user for the Talent Suite Admin application.

Column Header	Required on Create	Required on Update	Description	Max Value Character Count	Format	Example
TS_ADMIN_ACCESS	Yes	No	<p>This field determines whether or not the user is provisioned for Talent Suite Admin in the Talent Suite.</p> <p>Note: This field is only required if you are trying to provision the user for Talent Suite Admin.</p> <p>This field supports the following states:</p> <p>ACTIVE = User is active in the system and will have access to the application through the Talent Suite. (We also support [1] for this state.)</p> <p>INACTIVE = User is inactive in the system and will not have access to the application through the Talent Suite. (We also support [0] for this state.)</p> <p>ACTIVE_NO_ACCESS = User is active in the system but will not have access to the application through the Talent Suite.</p>	26	Alphanumeric. (Not case sensitive.)	ACTIVE

The following field is only applicable when provisioning a user for the Talent Suite Admin application.

Table 14. Talent Suite Admin Field used for provisioning a user for access to the Talent Suite Admin application. The fields in this table are only applicable when provisioning a user for the Talent Suite Admin application.

Column Header	Required on Create	Required on Update	Description	Max Value Character Count	Format	Example
TS_ADMIN_USER_TYPE	Yes	No	User type of the user in Talent Suite. The value MUST already exist in Talent Suite.	255	Alphanumeric. (Case sensitive.)	IBM_ADMIN

Talent Gateway Jobs field

Procedure

To provision a user for the Talent Gateway Jobs application, follow the instructions in the Talent Gateway Jobs field table.

Table 15. Talent Gateway Jobs field. Use the Talent Gateway Jobs field table when provisioning a user for the Talent Gateway Jobs application.

Column Header	Required on Create	Required on Update	Description	Max Value Format	Example
BRTG_JOBS_ACCESS	Yes	No	<p>This field determines whether or not the user is provisioned for Talent Gateway in the Talent Suite.</p> <p>Note: This field is only required if you are trying to provision the user for Talent Gateway.</p> <p>This field supports the following states:</p> <p>ACTIVE = User is active in the system and will have access to the application through the Talent Suite. (We also support [1] for this state.)</p> <p>INACTIVE = User is inactive in the system and will not have access to the application through the Talent Suite. (We also support [0] for this state.)</p> <p>ACTIVE_NO_ACCESS = User is active in the system but will not have access to the application through the Talent Suite.</p>	Alphanumeric. (Not case sensitive.)	ACTIVE

Assess Application Fields

Procedure

To provision a user for the Talent Suite Assess application, follow the instructions in the Talent Suite Assess Field used for provisioning a user for access to the Assess application table.

The following field is only applicable when provisioning a user for the Assess application.

Table 16. Talent Suite Assess Field used for provisioning a user for access to the Assess application. The fields in this table are only applicable when provisioning a user for the Assess application.

Column Header	Required on Create	Required on Update	Description	Max Character Count	Value Format	Example
ASSESS_USER_TYPE	Yes	No	User type of the user in Assess. Also known as the Role Authorities in Assess.	40	numeric. (Case sensitive.) Pipe () delimiter	ROLE_ASSESS_ADMINISTRATOR
USER_LICENSED_ORGIDS	No	No	Store OrgIDs for Assess User.	40	numeric	All

IBM Watson Recruitment (IWR) Application Fields

Procedure

To provision a user for the Talent Suite IWR application, follow the instructions in the Talent Suite IWR Field used for provisioning a user for access to the IWR application table.

The following field is only applicable when provisioning a user for the IWR application.

Table 17. Talent Suite IWR Field used for provisioning a user for access to the IWR application. The fields in this table are only applicable when provisioning a user for the IWR application.

Column Header	Required on Create	Required on Update	Description	Max Character Count	Value Format	Example
IWR_USER_TYPE	Yes	No	User type of the user in IWR. Also known as the Role Authorities in IWR.	40	numeric. (Case sensitive.) Pipe () delimiter	IWR_USER

Watson Career Coach (WCC) (Myca) Application Fields

Procedure

To provision a user for the Talent Suite WCC (Myca) application, follow the instructions in the Talent Suite WCC (Myca) Field used for provisioning a user for access to the WCC (Myca) application table.

The following field is only applicable when provisioning a user for the WCC (Myca) application.

Table 18. Talent Suite WCC (Myca) Field used for provisioning a user for access to the WCC (Myca) application. The fields in this table are only applicable when provisioning a user for the WCC (Myca) application.

Column Header	Required on Create	Required on Update	Description	Max Value Character Count	Format	Example
MYCA_USER_TYPE	Yes	No	User type of the user in . Also known as the Role Authorities in WCC (Myca).	4000	numeric. (Case sensitive.) Pipe () delimiter	EE

Upload the CSV file to the Talent Suite

Procedure

1. Once the .csv file has been created and is ready to upload to the Talent Suite, select the Browse button in the Select CSV file field. The File Upload dialog window opens.

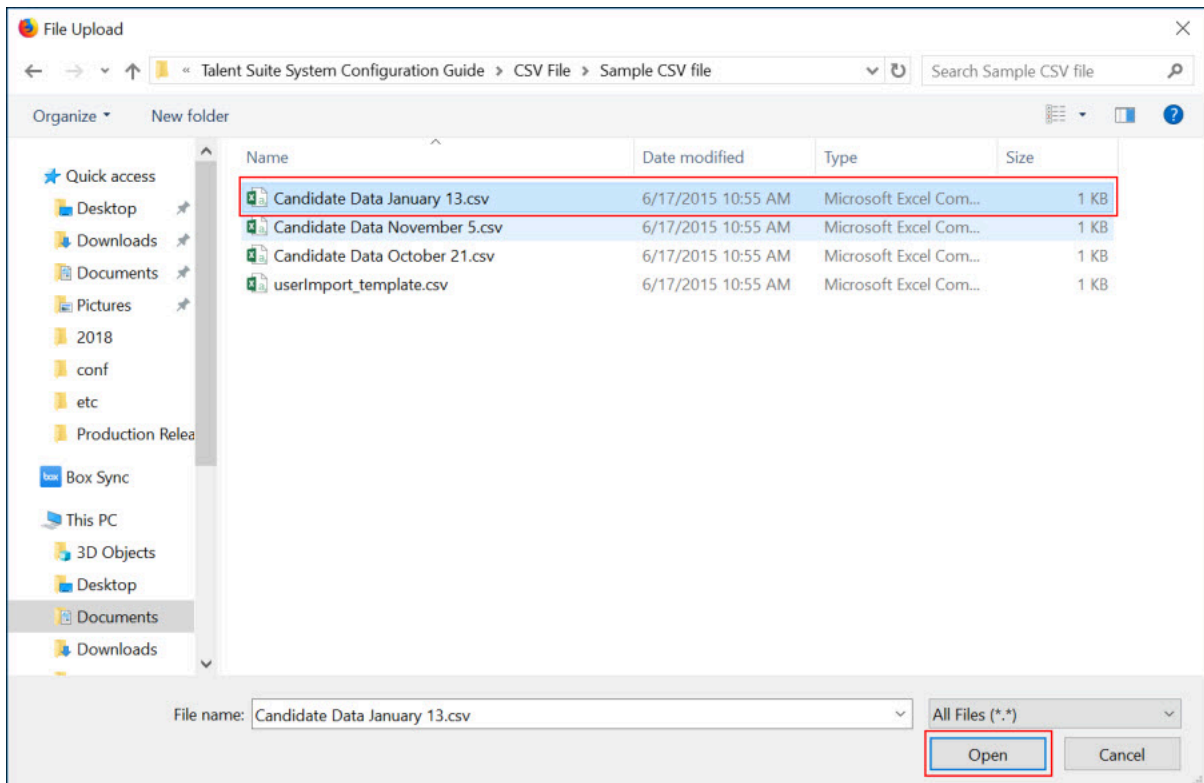
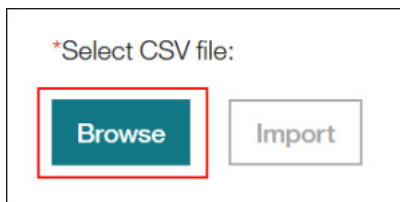


Figure 29. File Upload (Browse to select CSV file)

2. In the **File Upload** dialog box, navigate to the location of the .csv Import Users Specifications file created following the process steps in the User Provisioning, Import and Management and Creating the .csv File sections.

3. Select the .csv Import Users Specifications file and then select **Open**. The file will upload to the Talent Suite.
4. Select the .csv Import Users Specifications file and then select **Open**. The file then uploads to the Talent Suite. The .csv file appears in the Select CSV file field on the Import Users page.

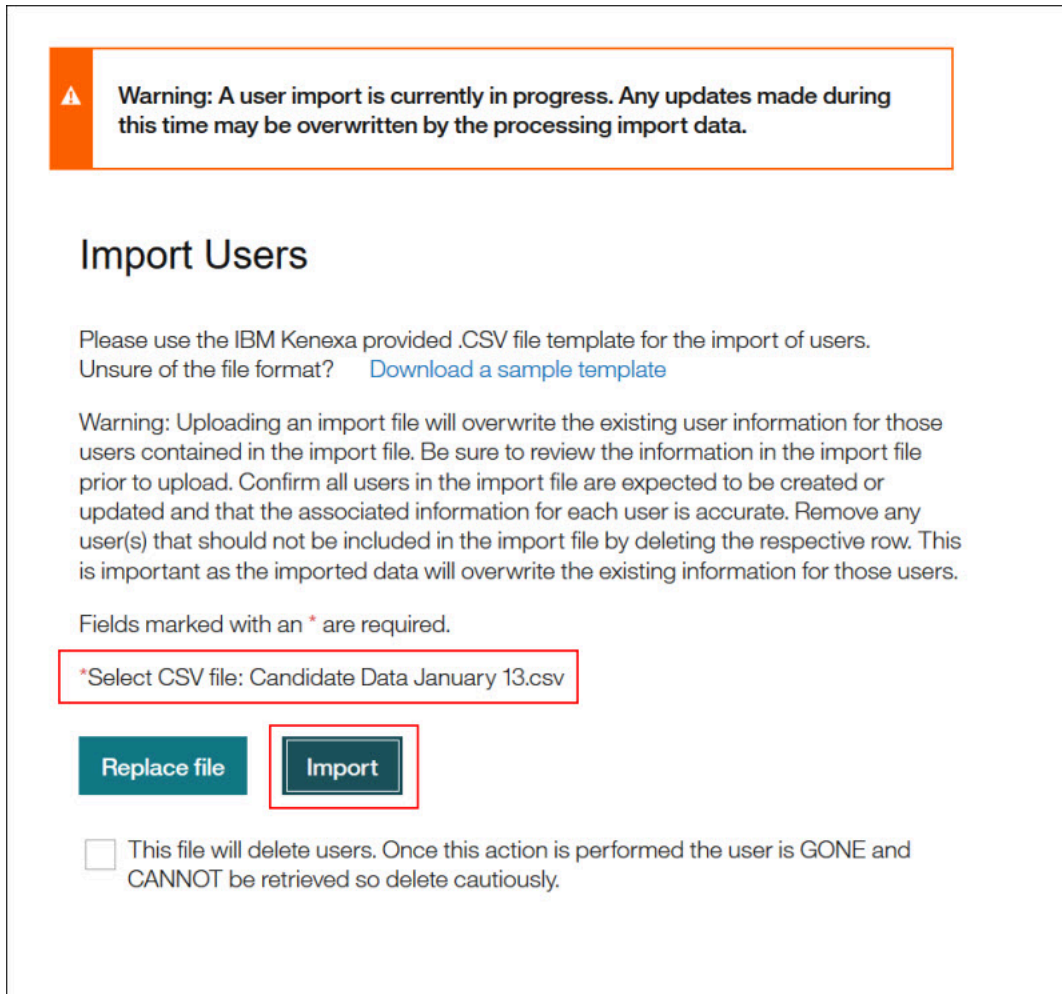
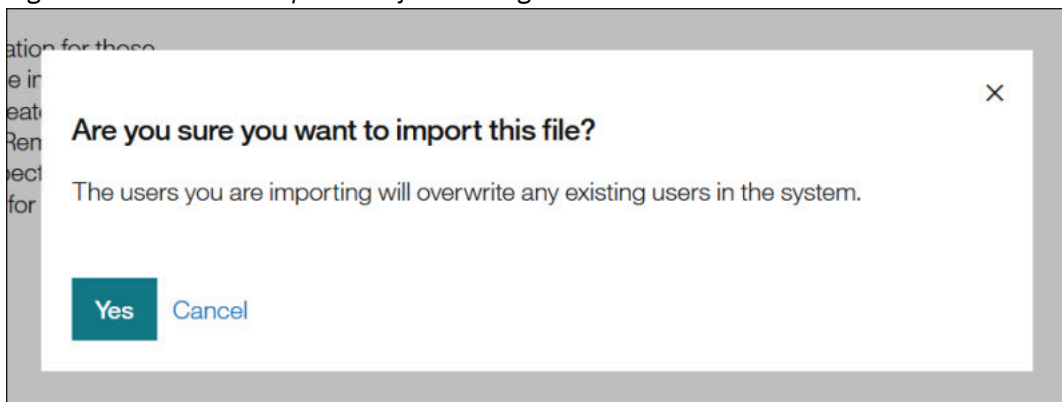


Figure 30. Import Users page - Uploaded CSV file

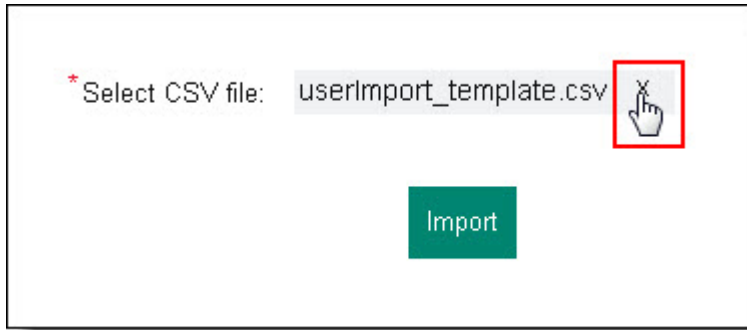
5. Select the **Import** button to import the file into the Talent Suite. A message dialog window displays with a message asking the user if they wish to proceed.
Are you sure you want to import this file? The users you are importing will overwrite any existing users in the system.

Figure 31. Proceed to import CSV file message



6. Select **Yes, proceed** to import the .csv file or **Cancel** to exit without importing the .csv file.

7. If **Cancel** is selected, then select the **x** icon for the .csv file displayed in the **Select CSV file** field to remove the file for upload into the Talent Suite.



To replace a CSV file,

8. Select **Replace file**. The **File Upload** dialog box opens.

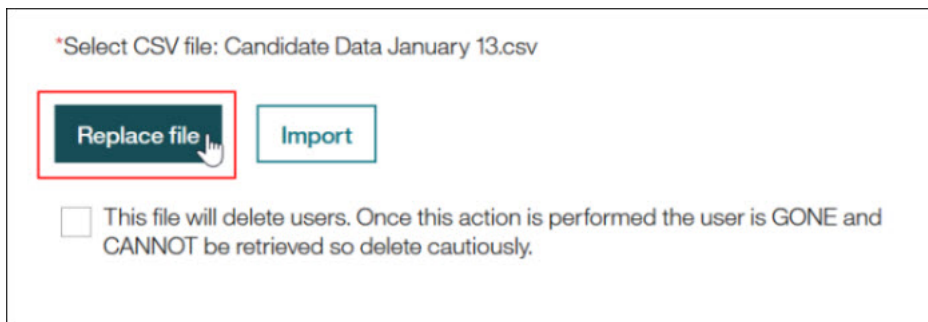


Figure 32. Replace file

9. Navigate to the location of the .csv Import Users Specifications file and select the .csv Import Users Specifications file to replace the existing file and select **Open**. The file then uploads to the Talent Suite to replace the previously uploaded file.

Editing CSV Files in Excel

Handling the file correctly in excel and importing it as a text data set will resolve the issues with leading zeros, and will ensure correct formatting of date fields, etc. It will also allow for the persistence of UTF-8 formatting.

About this task

Important: Any encoding of the user import file MUST be in UTF-8.

The best practice is to use a CSV reader or Notepad++ to open CSV Import files that you are working to prevent leading zeros, special characters, or date formats from being removed or corrupted.

Because of its ease of use, it is common practice to work on a CSV file in Excel. The problem with Excel is that it re-formats the values in your file; most prominently, it removes leading zeros in the values. Because many of our clients need to use leading zeros in values such as HRIS_EMPLOYEE_ID, extra care must be taken when handling the CSV file to ensure not to remove them before processing.

Procedure

To import a CSV file into Excel,

1. Open a new document in Excel first, without opening your file.
2. Go to the **Data** tab and select **From Text**. The **Import Text File** opens.
3. Select your file in the **Import Text File** dialog window and then select **Import**.

4. In the **Text Import Wizard** window, confirm the following selections:
 - a) **Delimited** and **My data has headers.** are selected.
 - b) **File Origin** is set to **65001 : Unicode (UTF-8).**
 5. Select **Next.**
 6. In the next window of the wizard, select only the **Comma** check box under Delimiters then select **Next.**
 7. In the last window of the wizard, highlight all the columns in the **Data preview** first, select **Text** under Column data format, and then select **Finish.**
- Note:** Make sure each column has **Text** above it instead of **General.**
8. In the **Import Data** dialing window, select **OK** to load the data starting in the first cell.
 9. In the newly imported text file, select **Save As** to save it as a .csv file.

In the **Save As window,**

10. Select a file location and **CSV (Comma delimited) (*.csv)** from the **Save as type** drop-down menu.

11. Select **Web Options** from the **Tools** drop-down menu. The **Web Options** window opens.

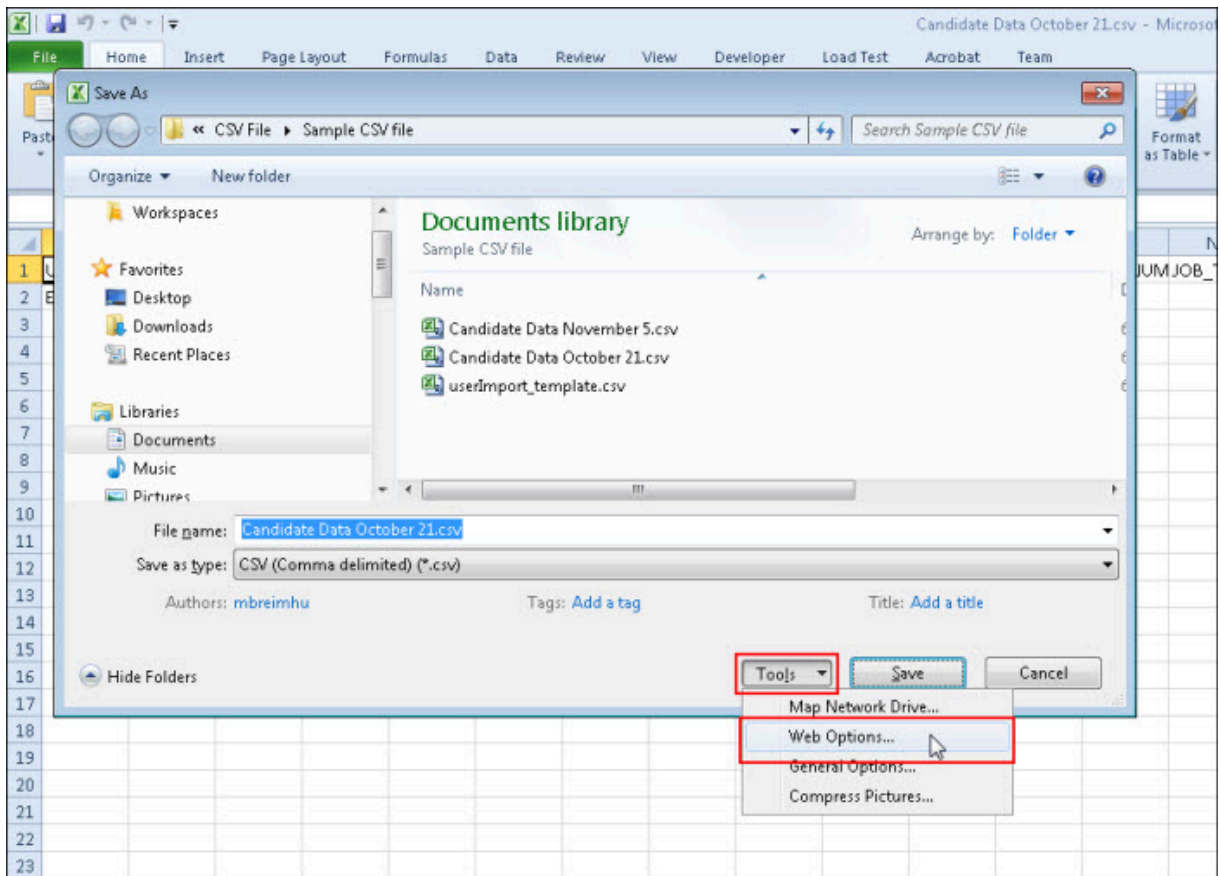


Figure 33. Save As dialog window

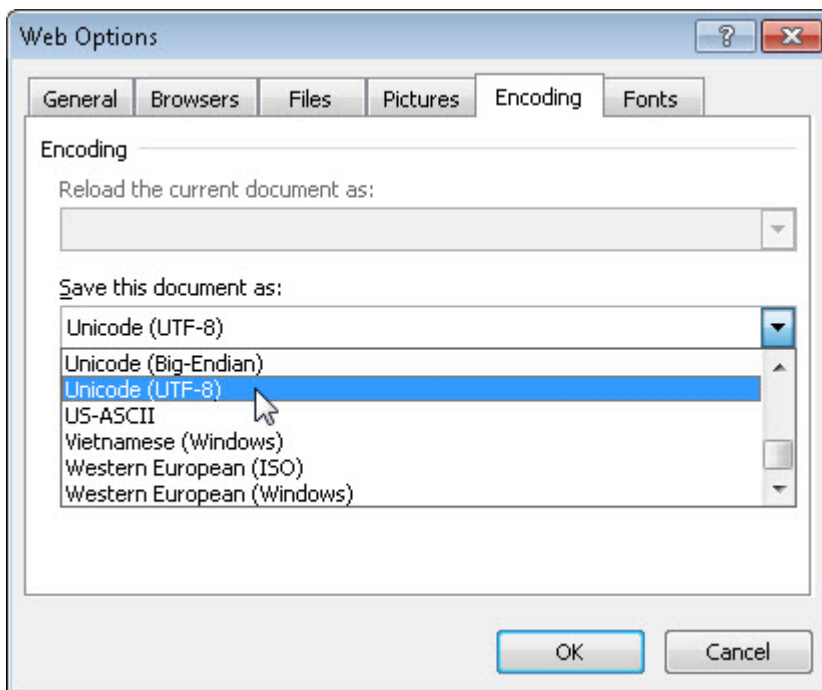


Figure 34. Web Options window

- a) In the **Web Options** window, select the **Encoding** tab.
- b) Select **Unicode(UTF-8)** from the **Save this document as:** drop-down menu; then select **OK**.

12. Select **Save**.

Important: Make sure to save the file as a **CSV (Comma delimited) (*.csv)** file. DO NOT save it as an **.xlsx** file.

Results

This process treats all the values like text, which retains the formatting of all cells (allowing for leading zeros), specified date formats, etc. Every time a CSV is edited in Excel, it must be handled with these steps.

Note: Be sure to open your file in a text reader after you are done to make sure your leading zeros are still present.

Import Users Activity Log

The Import Users Activity Log process is described in the following steps.

About this task

The Import Users Activity Log creates a common space to view the details of any user import job so that if an import is currently in-progress, the admin user may view, analyze past user data, troubleshoot, or audit a company's user management activities.

The screenshot shows the 'Import Users' interface. At the top, there are instructions and a 'Browse' button. Below is the 'Import Activity Log' table with the following data:

Start Date	Status	End Date	Total Users	Successful	Failed	Failure Report	Imported File	Initiated By	ID
2016-05-10	COMPLETE	2016-05-10	1	0	1	Failure Report	Imported File	iqc User12 iqcuser12@mailinator.com	a5e9ebdb-8756-4f60-a5f9-be325c7bdaaf
2016-05-06	COMPLETE	2016-05-06	50	45	5	Failure Report	Imported File	Admin User MyAdmin1iqc Testclient@bluebox.lotus.com	ba5190e050e84b04bd72723b07e2beb
2016-05-06	COMPLETE	2016-05-06	7	1	6	Failure Report	Imported File	Kanëna User TDclientzero@bluebox.lotus.com	b71fdab178424217b4f91227516e60
2016-05-06	COMPLETE	2016-05-06	7	1	6	Failure Report	Imported File	Admin User MyAdmin1iqc Testclient@bluebox.lotus.com	f4ab096at844518798cc71703c1b2c
2016-05-06	COMPLETE	2016-05-06	5	0	5	Failure Report	Imported File	GKC:17 GKC:17 GKC:17@bluebox.lotus.com	63164e8976564b5976d1a9381c1da59

Figure 35. Import Users - Import Users Activity Log

The Import Users activity log contains the following columns:

- **Start Date** - Date that the import started
- **Status** - The status of the import (such as, complete).

Note: While the status is being queued, the admin has the option to select **Cancel Import**. Selecting **Cancel Import** terminates the import. No data from the file will be processed.

The screenshot shows a single entry in the 'Import Activity Log' table with the following data:

Start Date	Status	End Date	Total Users	Successful	Failed	Failure Report	Imported File	Initiated By	ID
2016-04-22	QUEUED Cancel Import	QUEUED	0	0	0		Imported File	Feb onetwo admin04@test.com	1c09fc70-19c5-439b-b84d-e30 95ab19326

Figure 36. Cancel Import function

- **End Date** - Date that the import ended.
- **Total Users** - Total number of users in the import.
- **Successful** - Number of users successfully imported.
- **Failed** - Number of users that failed to import.
- **Failure Report** - The User Import, Failure Report CSV file. The report is available if any users failed import.

Note: The link to the **Failure Report** only displays if errors were encountered during the Import Users process. If there were no errors during the Import Users process, then the **Failure Report** link does not display.

- **Imported File** - The CSV file that contains the list of users to import.
- **Initiated By** - The user name and email address of the user who initiated the import.
- **ID** - The ID of the Import User job.

Procedure

To view the **Failure Report**,

1. Select the **Failure Report** link. The **Save As** dialog window opens.

Import Activity Log									
Start Date	Status	End Date	Total Users	Successful	Failed	Failure Report	Imported File	Initiated By	ID
2016-05-10	COMPLETE	2016-05-10	1	0	1	Failure Report	Imported File	iga User12 igouser12@mailinator.com	a5efe6db-8756-4f50-a5f9-be325c7bdaaf
2016-05-06	COMPLETE	2016-05-06	50	45	5	Failure Report	Imported File	Admin User MyAdmin1igaTestclient@bluebox.lotus.com	ba5195e650e84b04bd72723b07e2beb
2016-05-06	COMPLETE	2016-05-06	7	1	6	Failure Report	Imported File	Kenexa User TDclientzero@bluebox.lotus.com	b71fdab178424217b4f9122f7516e80
2016-05-06	COMPLETE	2016-05-06	7	1	6	Failure Report	Imported File	Admin User MyAdmin1igaTestclient@bluebox.lotus.com	4ab096afc844518798cc71703c1b2c
2016-05-06	COMPLETE	2016-05-06	5	0	5	Failure Report	Imported File	GKC17 GKC17 GKC17@bluebox.lotus.com	63164e8976564b5976d1a9381c1da59

Figure 37. Failure Report link

In the **Save As** dialog window,

2. Select the file location, then select **Save**.

To view the **Imported File**,

3. Select the **Imported File** link. The **Save As** dialog window opens.

Import Activity Log									
Start Date	Status	End Date	Total Users	Successful	Failed	Failure Report	Imported File	Initiated By	ID
2016-05-10	COMPLETE	2016-05-10	1	0	1	Failure Report	Imported File	iga User12 igouser12@mailinator.com	a5efe6db-8756-4f50-a5f9-be325c7bdaaf
2016-05-06	COMPLETE	2016-05-06	50	45	5	Failure Report	Imported File	Admin User MyAdmin1igaTestclient@bluebox.lotus.com	ba5195e650e84b04bd72723b07e2beb
2016-05-06	COMPLETE	2016-05-06	7	1	6	Failure Report	Imported File	Kenexa User TDclientzero@bluebox.lotus.com	b71fdab178424217b4f9122f7516e80
2016-05-06	COMPLETE	2016-05-06	7	1	6	Failure Report	Imported File	Admin User MyAdmin1igaTestclient@bluebox.lotus.com	4ab096afc844518798cc71703c1b2c
2016-05-06	COMPLETE	2016-05-06	5	0	5	Failure Report	Imported File	GKC17 GKC17 GKC17@bluebox.lotus.com	63164e8976564b5976d1a9381c1da59

Figure 38. Imported File link

In the **Save As** dialog window,

4. Select the file location, then select **Save**.

Permanently Delete User(s)

About this task

The Import Users page contains a check box enabling the user to permanently remove users from the User Interface (UI).

The deletion is for all TAS and applications. If the user wants to be deleted from a specific application, they should submit a ticket with that app.

The file being permanently deleted can only have these three headers which must be in the following order:

1. ACTIVE (must always be = 0)
2. HRIS_EMPLOYEE_ID (must always have an existing value)
3. DELETE_USER (must be set to yes (lowercase))

	A	B	C
1	ACTIVE	HRIS_EMPLOYEE_ID	DELETE_USER
2	0	37A	yes
3			
4			
5			

Figure 39. Sample file with required headers

If there is one failure in the file, this entire file will not be processed.

Examples include:

- The **This file will delete users** check box is not selected.
- **DELETE_USER** is not valued with **yes** for all entries.
- **ACTIVE** is not valued with **0** for all entries.

Important: You cannot add a user and delete a user in the same file. This is designed to make the **Delete** process very explicit and prevent accidents.

Do not attempt to immediately add a file using the same HRISID that was just deleted. It can take up to 24 hours for the delete process to complete; you should wait until the following day to attempt that import again. Issues may arise if this precaution is not taken.

Procedure

To permanently delete user(s),

1. Select the **This file will delete users. Once this action is performed the user is GONE and CANNOT be retrieved so delete cautiously.** check box. A dialog window displays with the message Are you sure you want to import this file? The action will delete users and is not reversible. Once this action is performed the user is immediately removed from the user interface. Within 24 hours, the user is PERMANENTLY DELETED and CANNOT be retrieved.

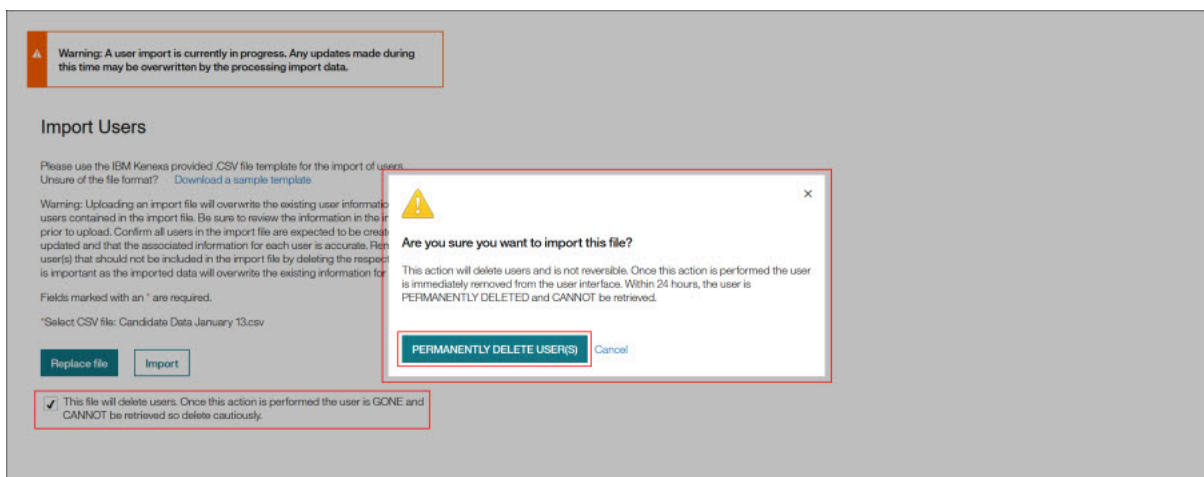


Figure 40. Permanently Delete User(s) dialog window

2. Select **PERMANENTLY DELETE USER(S)** to permanently delete user(s) or **Cancel** to exit without permanently deleting user(s).

Using the User Import Failure Report

The User Import Failure Report accompanies the User Import process and provides the Administrator with feedback about the user import job should any failure occur while performing a user import.

Note: The report is a CSV file, which is can be opened in Excel.

The User Import Failure Report provides:

- **Awareness** - Information is provided about all entries that have failed to import into one or more of the Talent Suite applications.
- **Direction** - New column headers are created that provide details of the cause of a failure for each Talent Suite application.
- **Action** - The administrator can simply re-use User Import Failure Report as an import file.

Note:

- To re-use the User Import Failure Report, simply correct the errors and upload as you would a typical user import .csv file. (You DO NOT need to remove the extra cause of error column headers.)
- The User Import Failure Report is generated only if there were failures during the user import process.

Note: New cause of failure column headers, are appended at the end of the existing column header row.

Receiving Notifications

The Admin who initiated the User Import will receive an email notification sent to the email address (setup on their Talent Suite user account) once the User Import has been completed.

About this task

There are two types of notifications the administrator may receive.

Procedure

1. A notification that the User Import has completed and there were no failures.
 - a) This is simply a notification to inform the administrator that the User Import has been completed.
2. A notification that the User Import has completed and there were failures.
 - a) This notification includes a link to the User Import Failure Report.
 - b) Upon clicking this link, the administrator will be redirected to a page within the Talent Suite with the option to download the User Import Failure Report.

Accessing and Downloading the User Import Failure Report

If failures occurred during the User Import process, then the administrator who initiated the User Import process will receive an email notification. This email contains a link that redirects the administrator to a page within the Talent Suite application with the option to download the User Import Failure Report.

Procedure

1. Select the following link in the notification email to download the User Import Failure Report .csv file.

The following is an example of a link in a notification email.

[https://2x.kenexa.com/wps/myportal/\\$tenant/client_name?uri=admin:importfail::961c8f5a-f469-462e-987b-716570406a95](https://2x.kenexa.com/wps/myportal/$tenant/client_name?uri=admin:importfail::961c8f5a-f469-462e-987b-716570406a95)

Note: If the user is not logged on to the Talent Suite, the administrator is then redirected to the Talent Suite Login page as shown in the following figure.



Figure 41. Talent Suite Login page

After user authentication and authorization, the Import Results page (shown in the following figure) opens if the User Import Failure Report ID is correct.

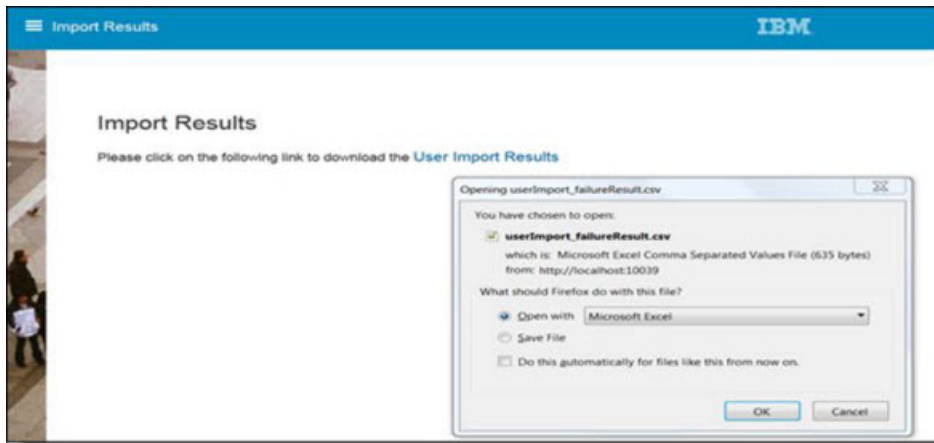


Figure 42. Import Results page

2. On the Import Results page, select the **User Import Results** link to open and download the User Import Failure Report.

3. In the Opening userImport_failureResult dialog window, select **Microsoft Excel** from the drop-down list in the Open with option field (as shown in the following figure) and select **OK** to download the User Import Failure Report.

Figure 43. User Import Results download



4. If the User Import Failure Report ID is wrong, remove the last two characters from valid report ID: [http://localhost:10039/wps/myportal/\\$tenant/USSE_GEDev?uri=admin:importfail:::961c8f5a-f469-462e-987b-716570406a](http://localhost:10039/wps/myportal/$tenant/USSE_GEDev?uri=admin:importfail:::961c8f5a-f469-462e-987b-716570406a)

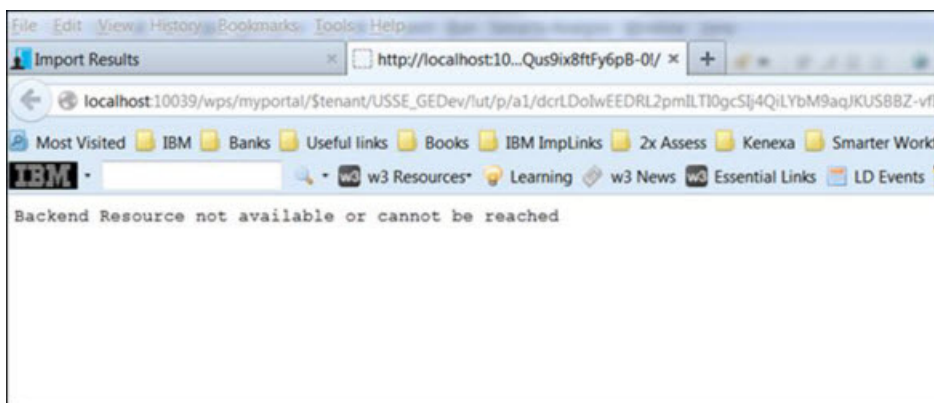


Figure 44. User Import Failure Report Service Exception

The following example shows the complete error message from the Service Exception.

```
responseCode=404, errorMessage=Backend Resource not available or cannot be reached . Please verify your proxy-config.xml is configured correctly Please check the installation documentation for proxy specific settings
```

User Import Failure Report Error Messages

The User Import Failure Report contains Gatekeeper error messages for each application. These error messages indicate an application's license creation status. Usually, they will mean that the system failed to create the license for said application.

After an import is complete, the user that ran the import will receive an email of the status. If there were no failures, the email will state that all users were loaded successfully. However, if there were failures in the import, the email will contain a link to download the Failure Report. The Failure Report will only contain users that failed to import. Any users not included in the Failure Report have been loaded successfully.

Following are examples of the statuses you will see and the fields you will see them in.

<i>Table 19. USER_STATUS</i>	
Status Message	Action Needed
SUCCESS	No action needed for common user related fields.
FAILURE: Property [hrisEmployeeId] of class [User] is required.	HRIS_EMPLOYEE_ID is a required field on create. Please add a unique value for this user.
FAILURE: unique, Property [hrisEmployeeId] of class [User] is required.	HRIS_EMPLOYEE_ID is a required field on update. Please provide the correct value for this user.
FAILURE: Property [username] of class [class com.kenexa.User] is required.	USER_NAME is a required field on create. Please add a unique value for this user.
FAILURE: Property [firstName] of class [class com.kenexa.Person] is required.	FIRST_NAME is a required field on create. Please add a value for this user.
FAILURE: Property [lastName] of class [class com.kenexa.Person] is required.	LAST_NAME is a required field on create. Please add a value for this user.
FAILURE:***** is an invalid email address.	The value provided for EMAIL_ADDRESS was in an invalid format. Please update the value in the EMAIL_ADDRESS column to a valid email address format.
FAILURE: Locale with id ***** not found.	Contact your administrator as the locale you are trying to use might not be available for this client in the Talent Suite.
FAILURE: ACTIVE cannot be set to *****. Proper values are 1 0 or true false.	The value provided for ACTIVE was in an invalid format. Please update the value in the ACTIVE column to 1, 0, true, or false.
FAILURE: SSO_ENABLED cannot be set to abcd. Proper values are 1 0 or true false.	The value provided for SSO_ENABLED was in an invalid format. Please update the value in the SSO_ENABLED column to 1, 0, true, or false.
FAILURE: User can not be SSO enabled when client is SSO disabled.	User can not be SSO enabled when client is SSO disabled. If this client is supposed to be SSO enabled, please contact your administrator to have the client updated. If the client is not supposed to be SSO enabled, re-import your user and value SSO_ENABLED as false or leave it blank.
FAILURE: The given validity Date - ***** is not a valid Date Format.	The value provided for VALIDITY_DATE was in an invalid format. Please update the value in the VALIDITY_DATE column to YYYY-MM-DD format.
FAILURE: The given expiration Date - ***** is not a valid Date Format.	The value provided for EXPIRATION_DATE was in an invalid format. Please update the value in the EXPIRATION_DATE column to YYYY-MM-DD format.
FAILURE: The USER_CATEGORY supplied [*****] is not a valid value for this field.	The value provided for the USER_CATEGORY was invalid. Please update the value to one of the accepted values.

<i>Table 20. BR_HIRING_STATUS</i>	
Status Message	Action Needed
SUCCESS	No action needed for BR related fields.

Table 20. BR_HIRING_STATUS (continued)

Status Message	Action Needed
	This user was not provisioned in this downstream application. If this user was meant to be provisioned for this application check the USER_STATUS column. If there is an error in that column, fix that error and re-import the file.
FAILURE: Country value is invalid. Country invalid is not a valid country value. User could not be uploaded.	Please update the value in the user's COUNTRY field to a valid value.
FAILURE: User Type not found. Required tag User Type was not found in the XML. User could not be uploaded.	Please update the value in the BR_HIRING_USER_TYPE column to a valid value that exists in BrassRing for this user.
FAILURE: User Group is invalid. User group invalid is not a valid user group value. User could not be uploaded.	Please update the value in the BR_USER_GROUP column to a valid value that exists in BrassRing for this user.
FAILURE: At least one approval group is invalid. At least one approval group failed validation. Please check approval group(s) in the XML. User could not be uploaded.	Please update the value in the BR_APPROVAL_GROUPS column to a valid value that exists in BrassRing for this user.
FAILURE: Missing required fields: SENDER_EMPLOYEE_ID	The value in the SENDER_EMPLOYEE_ID column is required and must be a valid value that already exists in BrassRing. Please update the value in the SENDER_EMPLOYEE_ID column to a valid value that exists in BrassRing for this user.
FAILURE: Validate Access: - Access not setup for Sender - invalid	The value in the SENDER_EMPLOYEE_ID column is required and must be a valid value that already exists in BrassRing. Please update the value in the SENDER_EMPLOYEE_ID column to a valid value that exists in BrassRing for this user.
FAILURE: At least one code access group is invalid. At least one code access group failed validation. Please check code access group(s) in the XML. User could not be uploaded.	Please update the value in the BR_CODE_ACCESS_GROUPS column to a valid value that exists in BrassRing for this user.
FAILURE: At least one code KIB user group is invalid. At least one KIB user group failed validation. Please check KIB user group(s) in the XML. User could not be uploaded.	Please update the value in the BR_KIB_USER_GROUP column to a valid value that exists in BrassRing for this user.
FAILURE: Manager value is invalid. Manager invalid is not a valid manager value. Manager must be 1 or 0. User could not be uploaded.	Please update the value in the BR_MANAGER column to a valid value for this user.
FAILURE: Recruiter value is invalid. Recruiter invalid is not a valid recruiter value. Recruiter must be 1 or 0. User could not be uploaded.	Please update the value in the BR_RECRUITER column to a valid value for this user.

Table 20. BR_HIRING_STATUS (continued)

Status Message	Action Needed
FAILURE: Org Group is missing. Required tag OrgGroup was not found. AT least one Org Group needs to be passed to create a new user. User could not be uploaded.	BR_ORGANIZATION_GROUP is a required field. Please update the value in the BR_ORGANIZATION_GROUP column to a valid value that exists in BrassRing for this user.
FAILURE: At least one Org Group is invalid. At least one org group failed validation. Please check org group(s) in the XML. User could not be uploaded.	Please update the value in the BR_ORGANIZATION_GROUP column to a valid value that exists in BrassRing for this user.
FAILURE: At least one Org Group is invalid. At least one org group failed validation. Please check org group(s) in the XML. User could not be uploaded.	The username you are trying to use for this user is already in use in BrassRing with a different HRIS_EMPLOYEE_ID or no HRIS_EMPLOYEE_ID. Verify the user in BrassRing and see if the HRIS_EMPLOYEE_ID needs to be added to the user. If it is already in use by another user, a different USER_NAME must be used.
FAILURE: Error while dispatching hrxml [Server was unable to process request. --- > Input string was not in a correct format. at System.Web.Services.Protocols.SoapHttpClientProtocol.ReadResponse(SoapClientMessage message, WebResponse response, Stream responseStream, Boolean asyncCall)\n at System.Web.Services.Protocols.SoapHttpClientProtocol.Invoke(String methodName, Object[] parameters)\n at System.Web.Services.Protocols.SoapHttpClientProtocol.Invoke(String methodName, Object[] parameters)\n at DispatchService.HRISMessageRouter.MessageRouter.Route(String HRXML)\n at DispatchService.DispatchMessage.Dispatch(String HRXML)]	The Internal Client ID was not configured correctly. Please contact your administrator to have the value corrected.

Table 21. OB_MANAGER_STATUS

Status Message	Action Needed
SUCCESS	No action needed for OB related fields.
	This user was not provisioned in this downstream application. If this user was meant to be provisioned for this application, check the USER_STATUS column. If there is an error in that column, fix that error and re-import the file.
FAILURE: CTGDIA207E An Exception occurred while trying to invoke the Web Service. Exception message: com.kenexa.core.integration.validation.ValidationException: A user with this email already exists.	Onboard does not allow for multiple users to have the same email address at this time. Please change the value in the EMAIL_ADDRESS column and re-import. If you need to use this email address for this user, you will need to find out which user is currently using it; then update that user with another email address before re-importing your user.

<i>Table 21. OB_MANAGER_STATUS (continued)</i>	
Status Message	Action Needed
FAILURE: CTGDIA207E An Exception occurred while trying to invoke the Web Service. Exception message: com.kenexa.core.integration.validation.ValidationException: User type cannot be empty or null.	OB_MANAGER_USER_TYPE is a required value when provisioning for Onboard. Add a valid value in the OB_MANAGER_USER_TYPE column for this user that exists in Onboard.
FAILURE: CTGDIA207E An Exception occurred while trying to invoke the Web Service. Exception message: com.kenexa.core.integration.validation.ValidationException: User Group is missing and required.	OB_MANAGER_USER_GROUP is a required value when provisioning for Onboard. Add a valid value in the OB_MANAGER_USER_GROUP column for this user that exists in Onboard.
FAILURE: CTGDIA207E An Exception occurred while trying to invoke the Web Service. Exception message: com.kenexa.core.integration.validation.ValidationException: The User group invalid was not found.	Please update the value in the OB_MANAGER_USER_TYPE column to a valid value that exists in Onboard for this user.
FAILURE: CTGDIA207E An Exception occurred while trying to invoke the Web Service. Exception message: com.kenexa.core.integration.validation.ValidationException: The User group invalid was not found.	Please update the value in the OB_MANAGER_USER_GROUP column to a valid value that exists in Onboard for this user.
FAILURE: CTGDIA207E An Exception occurred while trying to invoke the Web Service. Exception message: javax.xml.bind.UnmarshalException: For input string: \"invalid\\n\\n - with linked exception: \\n[java.lang.NumberFormatException: For input string: \"invalid\"]	PHONE_EXTENSION must be a valid number. Please update the value in the PHONE_EXTENSION column to a valid number for this user.

<i>Table 22. TM_PERFORMANCE_STATUS</i>	
Status Message	Action Needed
SUCCESS	No action needed for TM related fields.
	This user was not provisioned in this downstream application. If this user was meant to be provisioned for this application, check the USER_STATUS column. If there is an error in that column, fix that error and re-import the file.
FAILURE: Invalid request: No User Type provide or not validated User Type in TM.	The value in the TM_PERFORMANCE_USER_TYPE column is required and must be a valid value that already exists in Talent Manager. Please update the TM_PERFORMANCE_USER_TYPE column for this user with a valid value from Talent Manager.

Table 22. TM_PERFORMANCE_STATUS (continued)

Status Message	Action Needed
FAILURE:Missing required fields: SENDER_EMPLOYEE_ID	The value in the SENDER_EMPLOYEE_ID column is required and must be a valid value that already exists in Talent Manager. Please update the SENDER_EMPLOYEE_ID column for this user with a valid value from Talent Manager.
FAILURE:Client certificate was received, but unauthorized.	Contact your administrator as a change needs to be made to the client ID associated with this client.
FAILURE:Invalid request: CultureInfo exception, Locale value is not valid.	Contact your administrator as the locale you are trying to use might not be available for this client in Talent Manager.
FAILURE: Failed to import data due to an unexpected issue. Details:Internal Server Error: An issue occurred when retrieving dump status. ERROR NO: D403.	The value in one of your fields is over the character limit for Talent Manager. Example: DEPARTMENT only allows 20 characters in Talent Manager.

Table 23. TS_ADMIN_STATUS

Status Message	Action Needed
SUCCESS	No action needed for Talent Suite Admin access.
	This user was not provisioned in this downstream application. If this user was meant to be provisioned for this application, check the USER_STATUS column. If there is an error in that column, fix that error and re-import the file.

Table 24. BRTG_JOBS_STATUS

Status Message	Action Needed
SUCCESS	No action needed for Talent Gateway access.
	This user was not provisioned in this downstream application. If this user was meant to be provisioned for this application, check the USER_STATUS column. If there is an error in that column, fix that error and re-import the file.

Table 25. TI_TALENT_INSIGHTS_STATUS

Status Message	Action Needed
SUCCESS	No action needed for Talent Insights related fields.
	This user was not provisioned in this downstream application. If this user was meant to be provisioned for this application, check the USER_STATUS column. If there is an error in that column, fix that error and re-import the file.

How to Export Users

The Export Users function allows for the export of all users from the Talent Suite.

Once the export has been completed, an email is sent with instructions to download the results into CSV format that can be used as a user import .csv file. The following sections provide instructional steps for the configuration of Export Users Settings.

Navigation

This section gives instructions to access to the Export Users settings in the Admin application.

Procedure

Select **Export Users** in the navigation menu to launch the Export Users page shown in the following Export Users page figure.

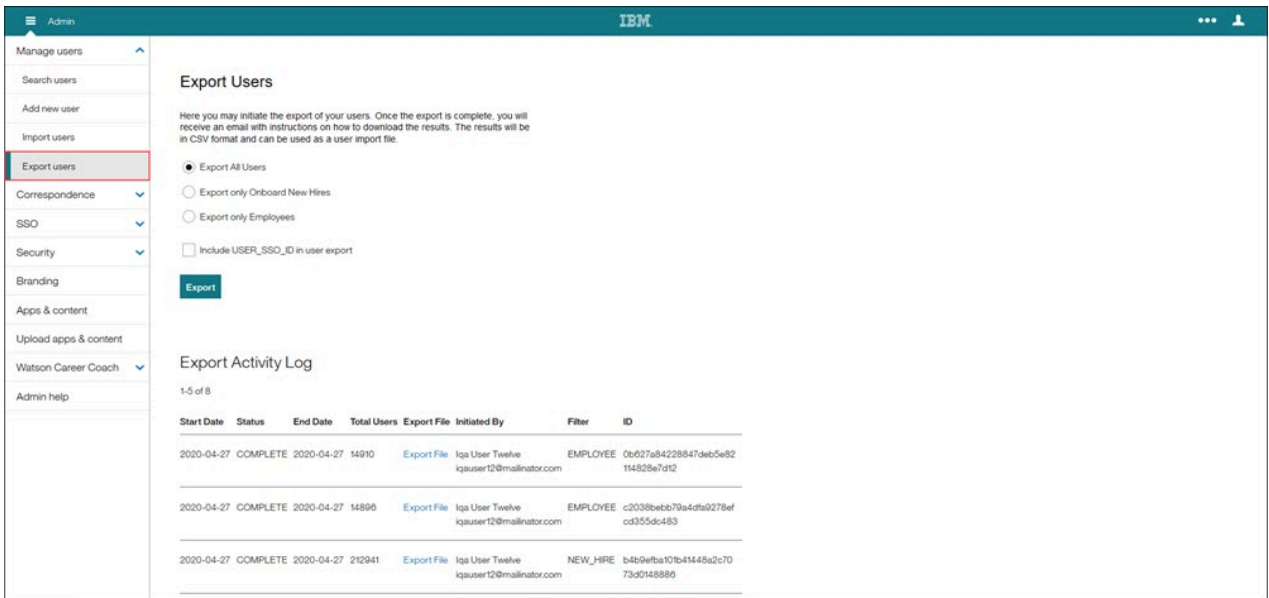


Figure 45. Export Users page

Export Users Steps

This section describes how to export users.

About this task

The file that is exported contains all of the import file columns. There are additional columns that come with an export that are specified below. These extra columns do not need to be removed if using the export file as an import file, they are ignored.

Extra Export Columns include:

- LAST_LOGIN

1. Customer can track when a user last accessed the system.
2. Customer can track if a new user ever accessed the system (if never accessed, field is blank).
3. Customer does not need to remove this column on an import, it is ignored.

P	Q	R	S
VALIDITY_EXPIRATIC	LAST_LOGIN	SEND_PA	
1/1/2000	1/1/3000		
#####		9/2/2015	

Export Users has the following three options available:

- Export All Users
- Export only Onboard New Hires
- Export only Employees

Procedure

Configure Export Users as follows,

1. Select one of the following applicable options.

- **Export All Users**
- **Export only Onboard New Hires**
- **Export only Employees**

To include SSOids with the exported data,

- a. Select the **Include USER_SSO_ID in user export** check box.

Note: For those that need to know the **USER_SSO_ID** for the users in the client, the **Include USER_SSO_ID in user export** check box can be selected before triggering the export. This will include the **USER_SSO_ID** column in addition to the existing fields within the export CSV.

	A	B	C	
1	ACTIVE	USER_SSO_ID	HRIS_EMPLOYEE_ID	USER_NAME
2	1	0000000000tmp000000000000	123456	tmpUsername

Figure 46. USER_SSO_ID column in CVS spreadsheet

2. Select the **Export** button to initiate the User Export function. The Export Users page opens with system generated confirmation message (We are processing your request. You will receive

an email shortly with instructions to download the export results. Your transaction ID is <>).

Important: This message is not a modal dialog, and no user confirmation is needed.

Admin IBM

Export Users

Here you may initiate the export of your users. Once the export is complete, you will receive an email with instructions on how to download the results. The results will be in CSV format and can be used as a user import file.

Export All Users

Export only Onboard New Hires

Export only Employees

Include USER_SSO_ID in user export

Export

Figure 47. Export Users page

Note:

- There is no limit to the number of users you can export at a time. However, because of potential performance issues, it is recommended that you do not export more than 150,000 users at a time.
- If the export fails because of a system timeout or any other reason, the user sees the following failure message: (Your request cannot be processed at this time.).
- All error messages show in the User Interface (UI).

- When the export completes, an email is received with instructions to download the results with the following instructions:

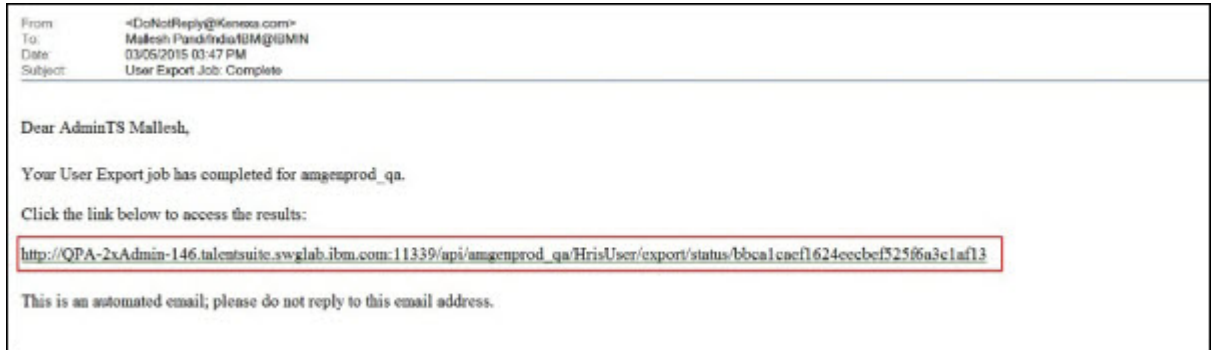
Dear <User.FirstName> <User.LastName> ,

Your User Export job has completed for <COMPANY_NAME> .

Click the link below to access the results: <User_Export_Results_Link>

Important: This is an automated email; please **DO NOT** reply to this email address. Select the link provided in the email to obtain the results. The email is configurable by the tenant. (The email is configurable by the tenant and Gatekeeper team members only.)

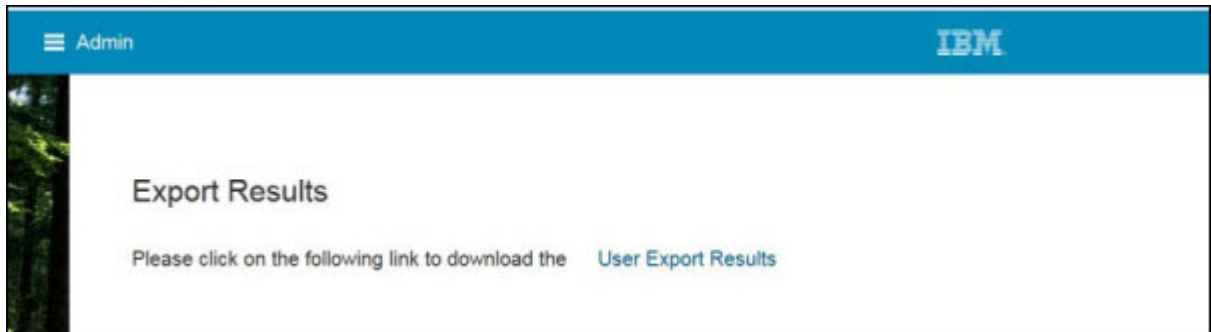
Figure 48. Export Users email instructions



- Select the link provided in the email.
- Authenticate into the Talent Suite if not already authenticated.
- On the Export Results page, select the **User Export Results** link to download the Export Users results.

Note: The results are downloaded into CSV format which can then be used as a user import .csv file.

Figure 49. Export Results



Export Activity Log

The Export Users Activity Log process is described in the following steps.

About this task

The Export Users Activity Log allows the user to view and obtain export data to manage specific actions that are being taken on their user base.

Export Users

Here you may initiate the export of your users. Once the export is complete, you will receive an email with instructions on how to download the results. The results will be in CSV format and can be used as a user import file.

Export All Users
 Export only Onboard New Hires
 Export only Employees

Include USER_SSO_ID in user export

[Export](#)

Export Activity Log

1-5 of 8

Start Date	Status	End Date	Total Users	Export File	Initiated By	Filter	ID
2020-04-27	COMPLETE	2020-04-27	14910	Export File	Iqa User Twelve iqouser12@mailinator.com	EMPLOYEE	0b627a84228847deb5e82 114828e7d12
2020-04-27	COMPLETE	2020-04-27	14896	Export File	Iqa User Twelve iqouser12@mailinator.com	EMPLOYEE	c2038bebb70a4dfa9278ef cd355dc483
2020-04-27	COMPLETE	2020-04-27	212941	Export File	Iqa User Twelve iqouser12@mailinator.com	NEW_HIRE	b4b9efba10fb41448a2c70 73d0148886
2020-04-27	COMPLETE	2020-04-27	349627	Export File	Iqa User Twelve iqouser12@mailinator.com	ALL USERS	4ef53341458f46509cfaf71 5f5d23296
2020-04-23	COMPLETE	2020-04-23	14892	Export File	Iqa User Twelve iqouser12@mailinator.com	EMPLOYEE	06d360b7691b4229b436 d71dc1bef46c

< 1 2 >

Figure 50. Export Users page - Export Users Activity Log

The Export activity log contains the following columns:

- **Start Date** - Date that the export started
- **Status** - The status of the export (such as, complete or failed).
- **End Date** - Date that the export ended.
- **Total Users** - Total number of users in the export.
- **Export File** - The CSV file that contains the list of users to export.
- **Initiated By** - The user name and email address of the user who initiated the export.
- **Filter** - The Filter column displays **NEW_HIRE** if the export is new hires only; **EMPLOYEE** if the export is employees only; **ALL USERS** if all users are exported.
- **ID** - The ID of the Export job.

Procedure

To view the **Export File**,

1. Select the **Export File** link. The **Save As** dialog window opens.



Start Date	Status	End Date	Total Users	Export File	Initiated By	Filter	ID
2016-05-11	COMPLETE		38386	Export File	Mallesh AdminUser Mallesh.Pandi@in.ibm.com	NEW_HIRE	15052419db3e40a0b16c da15c5712e60
2016-05-10	COMPLETE		38079	Export File	Test training Test4 UtpalPatra@in.ibm.com	NEW_HIRE	3d00d0b6c46e4dfb89f75 5c17d0ce4cd
2016-05-10	COMPLETE		38079	Export File	Test training Test4 UtpalPatra@in.ibm.com	NEW_HIRE	1996645b213b49b7bfe1 ea5614f34cc
2016-05-10	COMPLETE		38079	Export File	Test training Test4 UtpalPatra@in.ibm.com	NEW_HIRE	67d5f482a1d24951aa5df ee8ddd3c6ec
2016-05-10	CANCELLED		0		Test training Test4 UtpalPatra@in.ibm.com	NEW_HIRE	cf:379af34514d37a2b5cf 6014ec3001

Figure 51. Export File link

In the **Save As** dialog window,

2. Select the file location, then select **Save**.

Chapter 5. Managing Email Templates and Correspondence

Users can manage email templates and review correspondence email history that is sent by the Talent Suite application. Access to the features is based on user type permission.

Manage Email Templates

Manage Email Templates is a self-service feature which allows the user to manage their correspondence email templates.

Important: To turn this feature on, add user type **CT_ADMIN** under ADMIN access for users you want to have access.

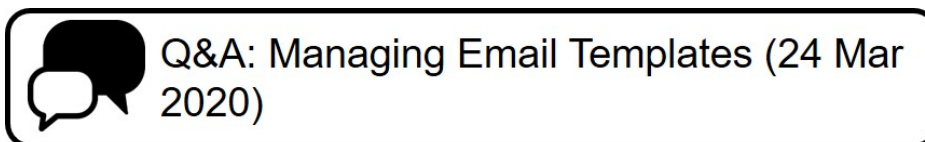
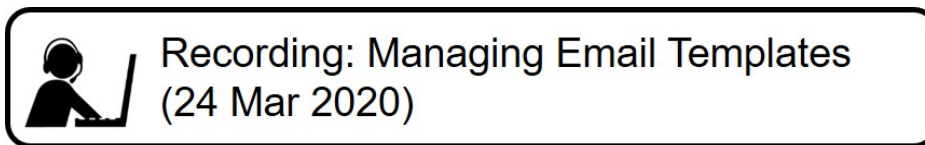
Access to the Manage Email Templates self-service feature is based on the Manage Email Templates user type permission (**CT_ADMIN**). Refer to the [User Types](#) section in this guide for user type access information.

The user can preview, edit, test, and publish correspondence emails using the Manage Email Templates self-service feature. It is available to be used by Talent Management Solution products (Talent Suite, Assess, and Onboard).

Relevant eLearning



Training and Enablement Session



Navigation

This section describes navigation steps to access the Manage Email Templates self-service functions on the Admin User Interface (UI).

Procedure

From the Admin app navigation menu,

1. Expand **Manage email templates** and select **Manage email templates** to launch the configuration settings. The Manage email templates page opens in the default card view displaying your customized correspondence email templates.

Tip: Each page contains breadcrumb links which can be used to navigate through all Manage email templates pages.

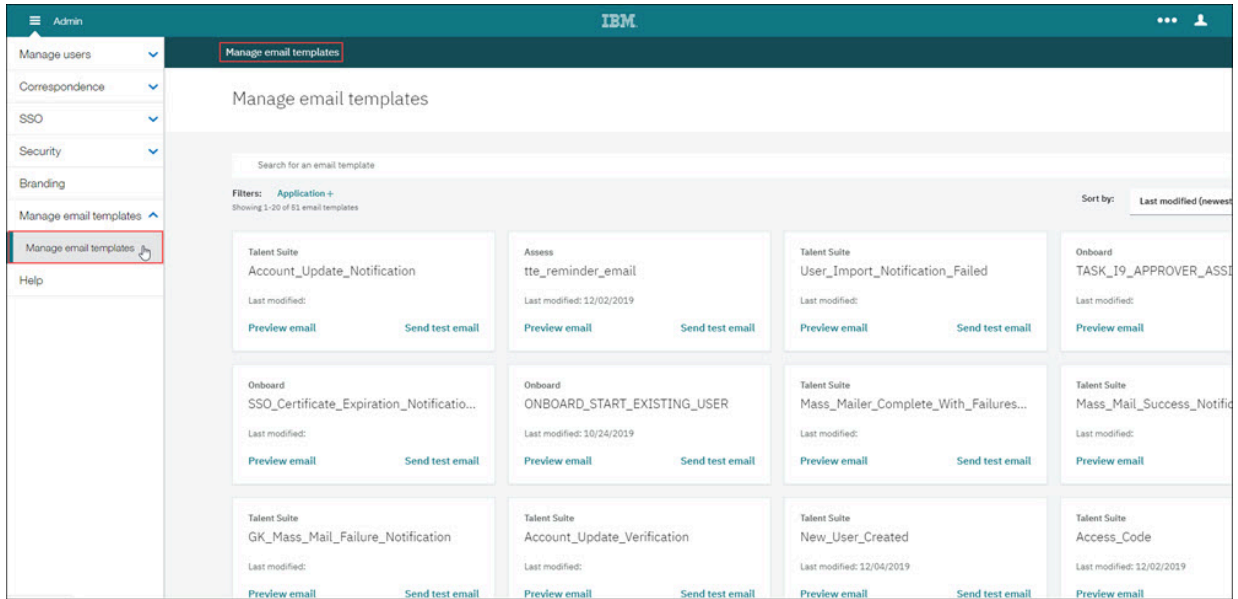


Figure 52. Manage email templates default landing page

2. Continue to the [Manage Email Templates Configuration](#) section for configuration steps.

Manage Email Templates Configuration

This section describes the various configurations of the Manage Email Templates self-service feature.

About this task

The Manage email templates page opens to display up to 20 email templates in the default card view. On this page you can change the email template view, add additional templates to the email template view, search email templates, sort templates, filter by Application, access the email template to edit the template, preview email, and send a test email.

Procedure

Select **Load more email templates** to display an additional 20 email templates.

- a) Repeat this step to display all of your email templates.

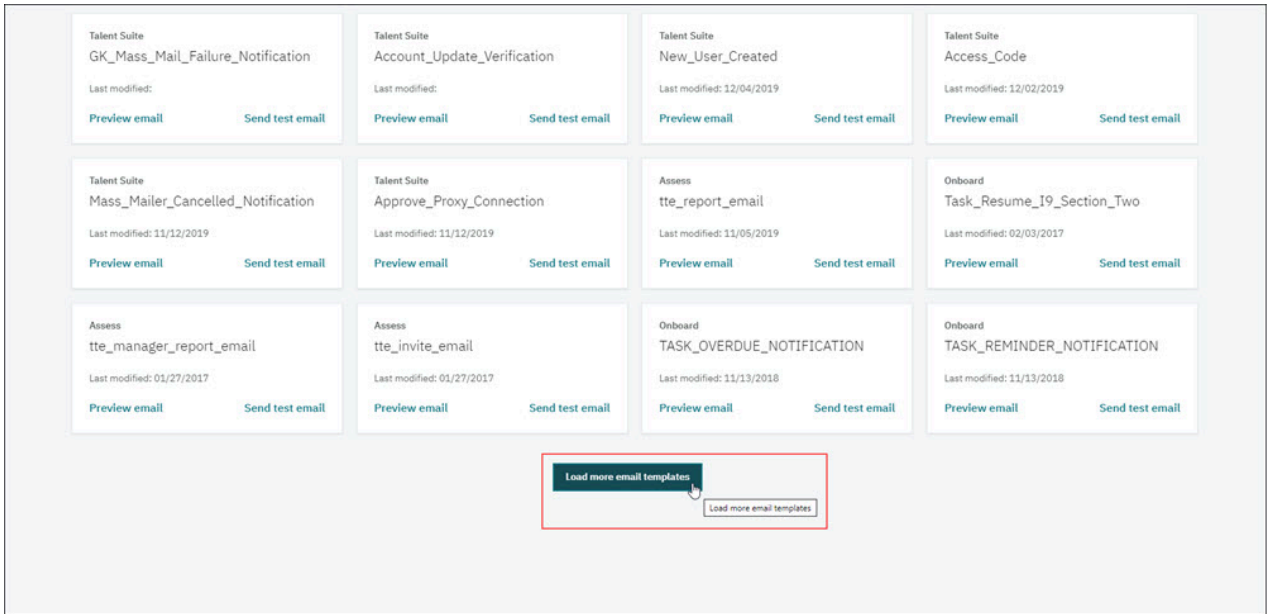


Figure 53. Select **Load more email templates** to load additional email templates

To Change the Template View from a Card View to a List View

Procedure

Select the **Template view toggle** icon. The Card view will now display as a list view.

- a) To return to the Card view, select the **Template view toggle** icon again.

Note: The Template view toggle and the List view are only available on large screens (992px+). On smaller screens only the Card view is available.

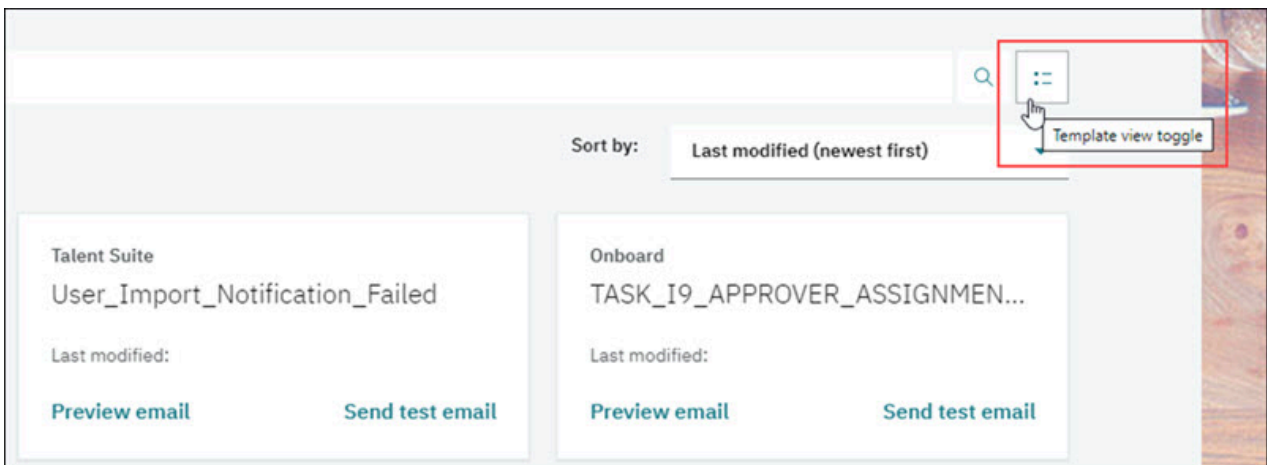


Figure 54. Select **Template view toggle** to change email template view

Manage email templates

Manage email templates

Search for an email template

Filters: Application +
Showing 1-20 of 63 email templates

Sort by: Last modified (newest first) ▾

Email template	Application	Last modified	Actions
Account_Update_Notification	Talent Suite		
tte_reminder_email	Assess	12/02/2019	
User_Import_Notification_Failed	Talent Suite		
TASK_19_APPROVER_ASSIGNMENT_NOTIFICATION	Onboard		
SSO_Certificate_Expiration_Notification_Internal	Onboard		
ONBOARD_START_EXISTING_USER	Onboard	10/24/2019	
Mass_Mailer_Complete_With_Failures_Notification	Talent Suite		
Mass_Mail_Success_Notification	Talent Suite		

Figure 55. Email Template List View

To Filter by Application

Procedure

1. Select **Application+ (Filter by application)** in the **Filters** field. The **Filter by application** dialing window opens.

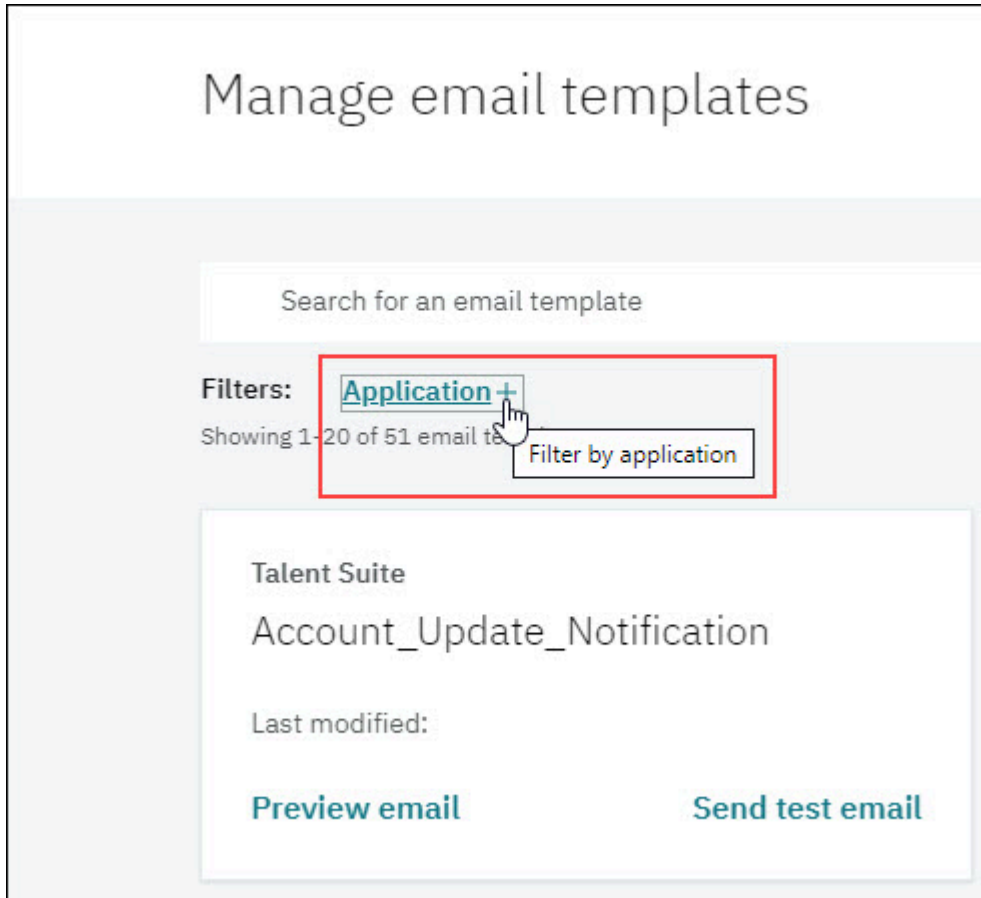


Figure 56. Application+ - Filter by application

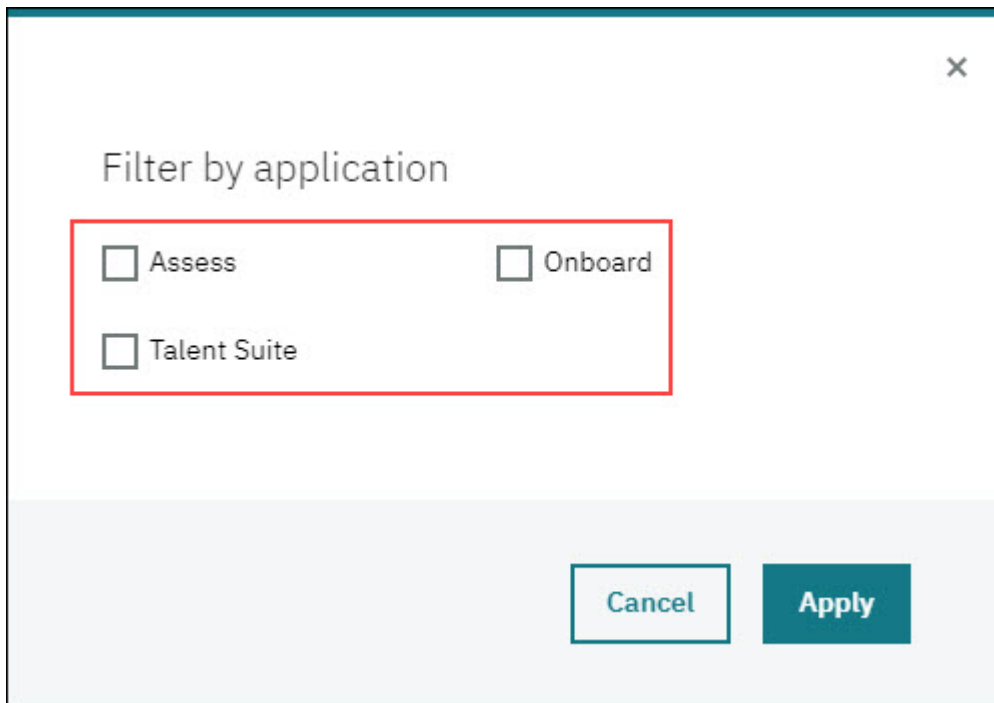


Figure 57. Filter by application dialog window

2. In the **Filter by application** dialog window, select one or more applications. The Manage email templates page then displays on those applications selected.

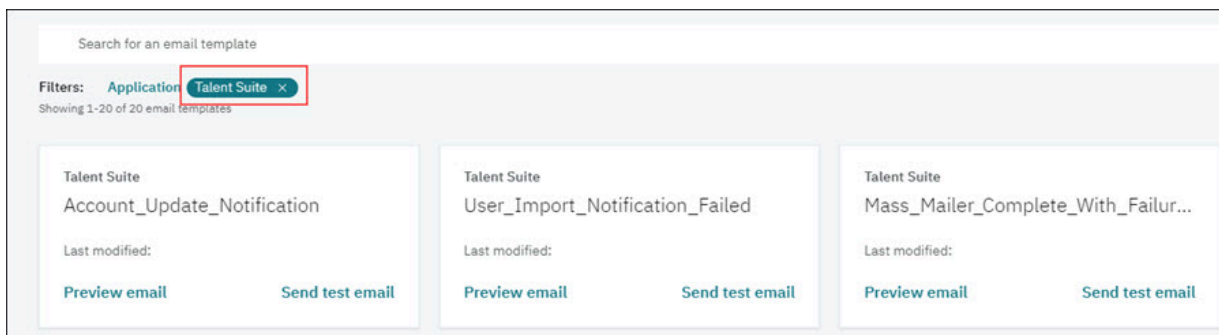
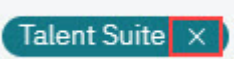




Figure 58. Filter by application results

3. Select the **X** in the application filter  to remove and go back to the full email template list.
4. To add application to or remove applications from the application filter, select the application link  name . This opens the **Filter by application** dialog window where you can update your selections.

To Search for an Email Template

Procedure

1. Enter a search term in the **Search for an email template** field and select the **Search** icon. Email templates with that search term display.



Figure 59. Search for an email template field

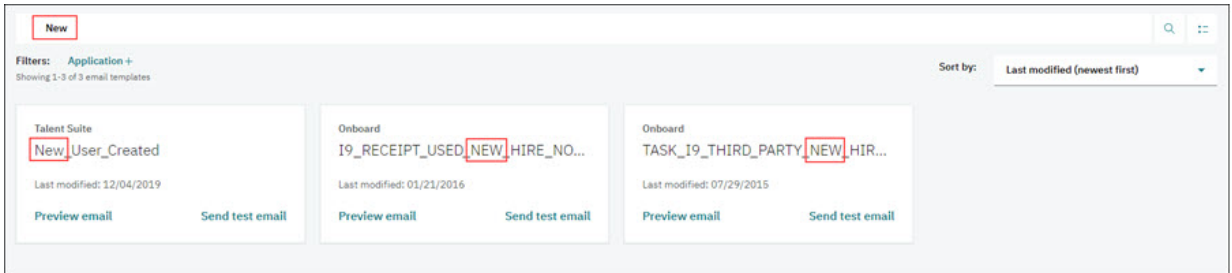


Figure 60. Search for an email template results

2. To return to the all email templates view, remove the search term from the **Search for an email template** field and select the **Search** icon.

To Sort Email Templates

Procedure

1. Select the drop down arrow in the **Sort by field** to expand the selection list.

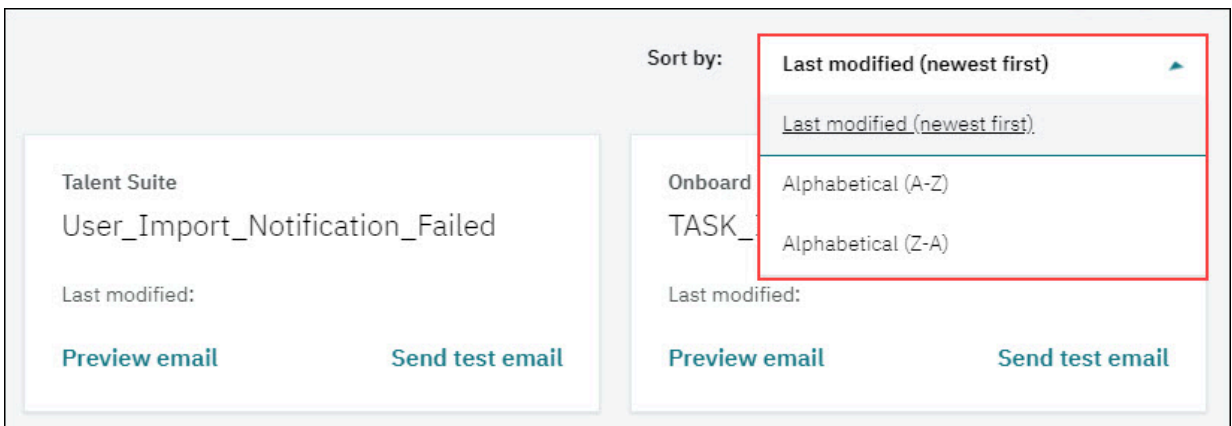


Figure 61. Sort by field

2. Select one of the following:
 - Last modified (newest first)
 - Alphabetical (A-Z)
 - Alphabetical (Z-A)

Preview Email

Preview email is a read only display which allows the user to preview the email template and confirm it is the one to be edited.

About this task

Preview email gives the user the details of the email template. It includes all Markers that have been selected for the email template. The user can then determine if this is the email template they wish to

edit. The different supported languages for the email template are displayed in the Language section. The user can view the Language drop down list to view the supported languages included with the email template.

Procedure

To open the email template in Preview,

1. Select **Preview email** in the email template you wish to view and edit. This opens the email template in a read only Preview window.

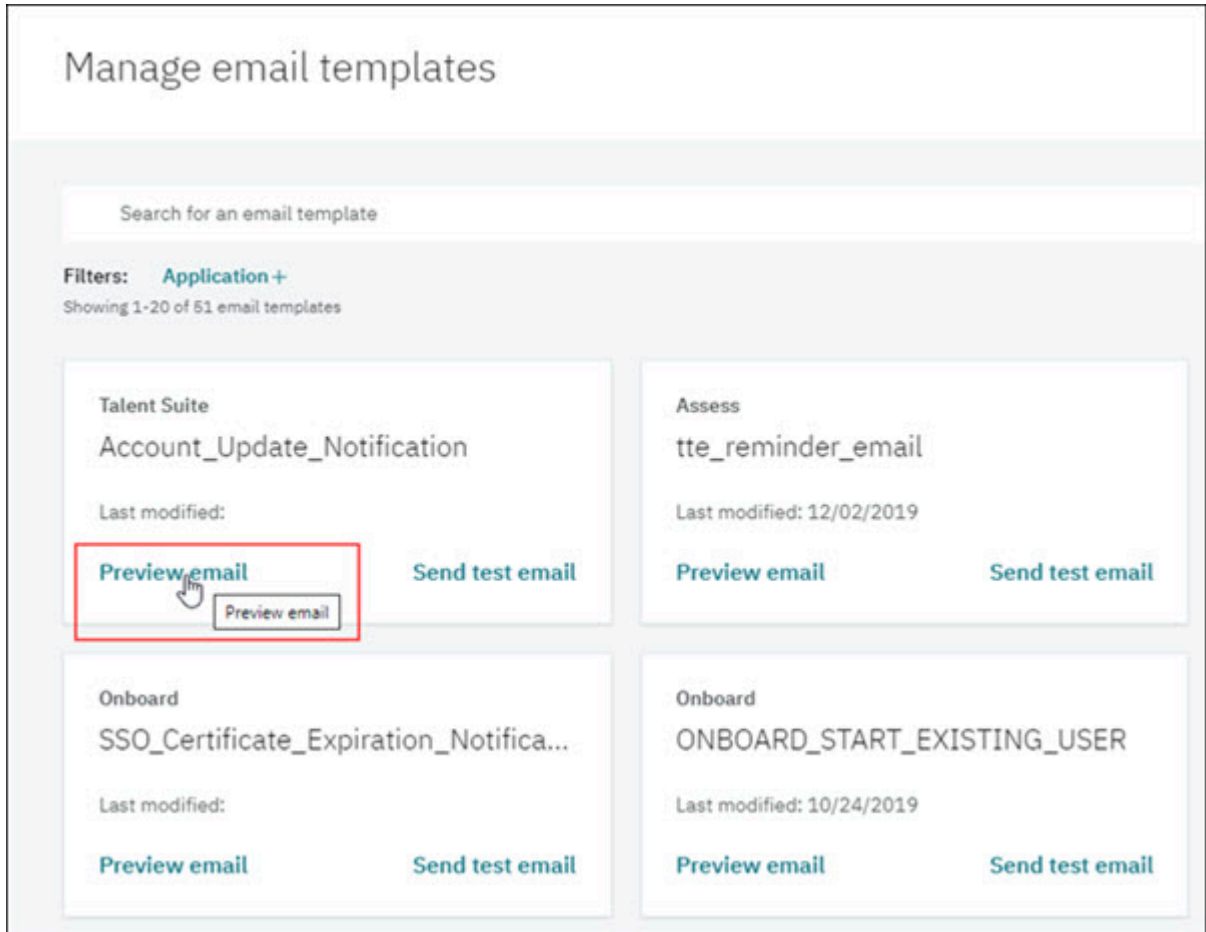


Figure 62. Select **Preview email** to view in preview mode

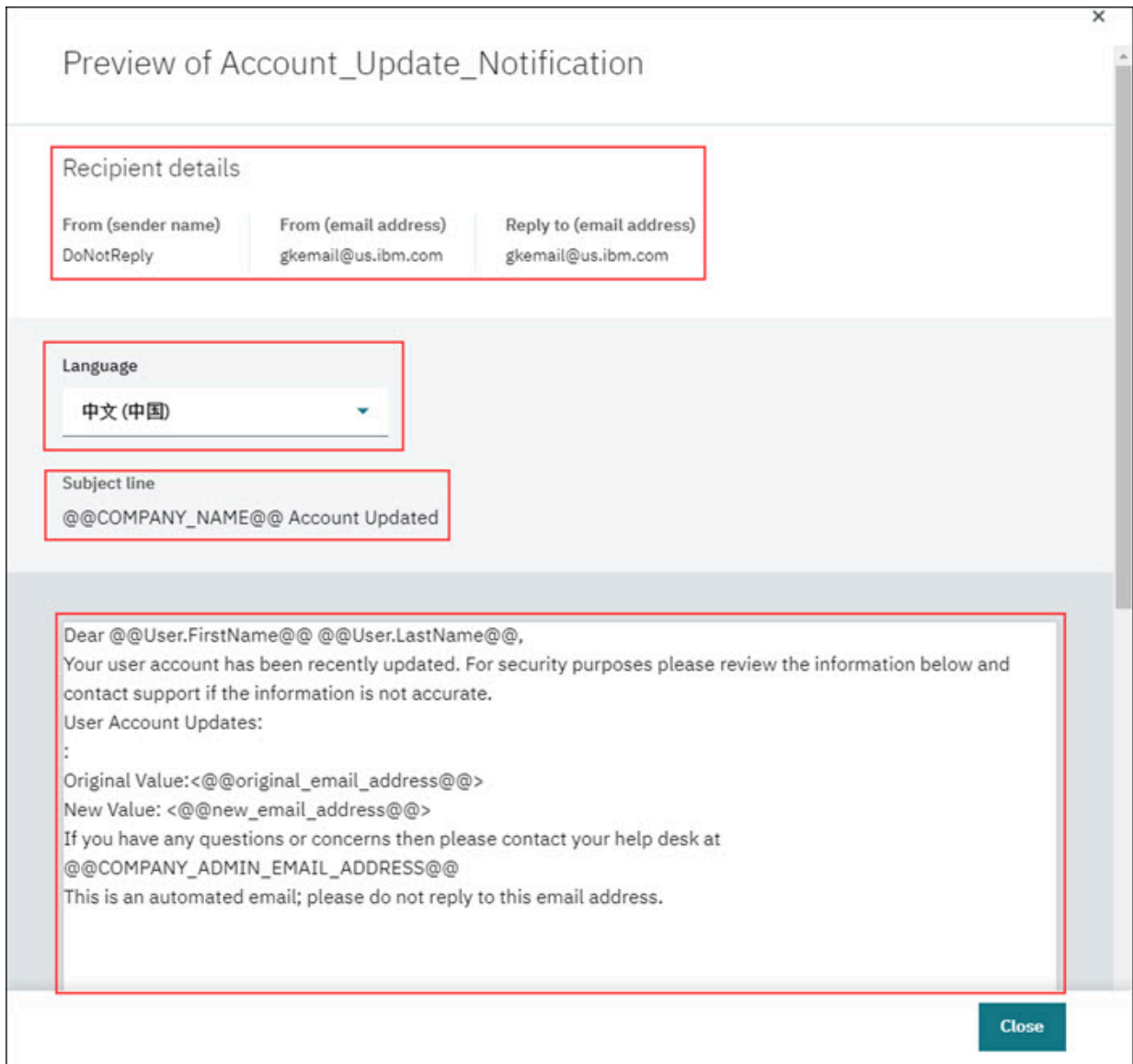


Figure 63. Preview window

2. Review content for the following sections of the email template.
 - a) **Recipient details** which includes:
 - From (sender name)
 - From (email address)
 - Reply to (email address)
 - b) **Language** by selecting the drop down list in the **Language** section.
 - c) **Subject line** for Markers and content.
 - d) **Body** editor of the email template. This includes any images, links, Markers, and text for the email.
3. Review **Markers** for all sections of the email.
4. Select **Close** once your review has been completed.
5. If edits are required, proceed to the [Edit Email](#) section for instructions to edit and publish your email template.

Edit Email

Edit email allows the user to make changes to their email templates as needed for various business needs. Fields in the email template are required or optional.

About this task

Markers

Markers are available to be used in your email to create a more personalized experience for your users. They are a placeholder that will be replaced with the specific user data for that Marker when the email is sent out. Markers may differ for each email template depending on the content of the email. Markers with the **Mail** icon signify it is an email address Marker. Marker details may be edited by the user. Specific email address or mailing list can be hard coded instead of adding a Marker. Markers can be dragged and dropped from the Markers list or added by selecting the **plus +** icon for the specified Marker in the Marker section to place the Marker at the cursor point of placement. Markers are displayed with the @ symbol (**@@markerName@@**) or greater than, percent symbol, equal/less than, percent symbol (**<%=markerName%>**). In the **Markers** section, you can select **click here** to bring up a list of description for each marker.

Important: Markers cannot be edited in this application. Templates are set up with the Markers that may be used. Markers differ per email template depending on what the template is to be used for.

Note: An error message displays when trying to save if there are problems with a Marker in a field.

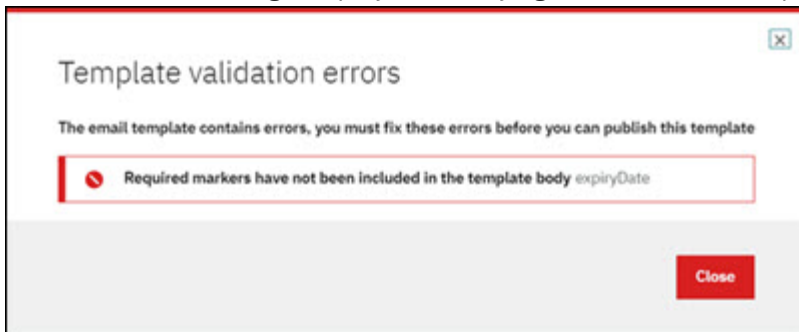


Figure 64. Template validation errors message window - Marker error message

Marker Descriptions

In the **Marker** section, you can select **click here** to view a list of Markers and their associated description.

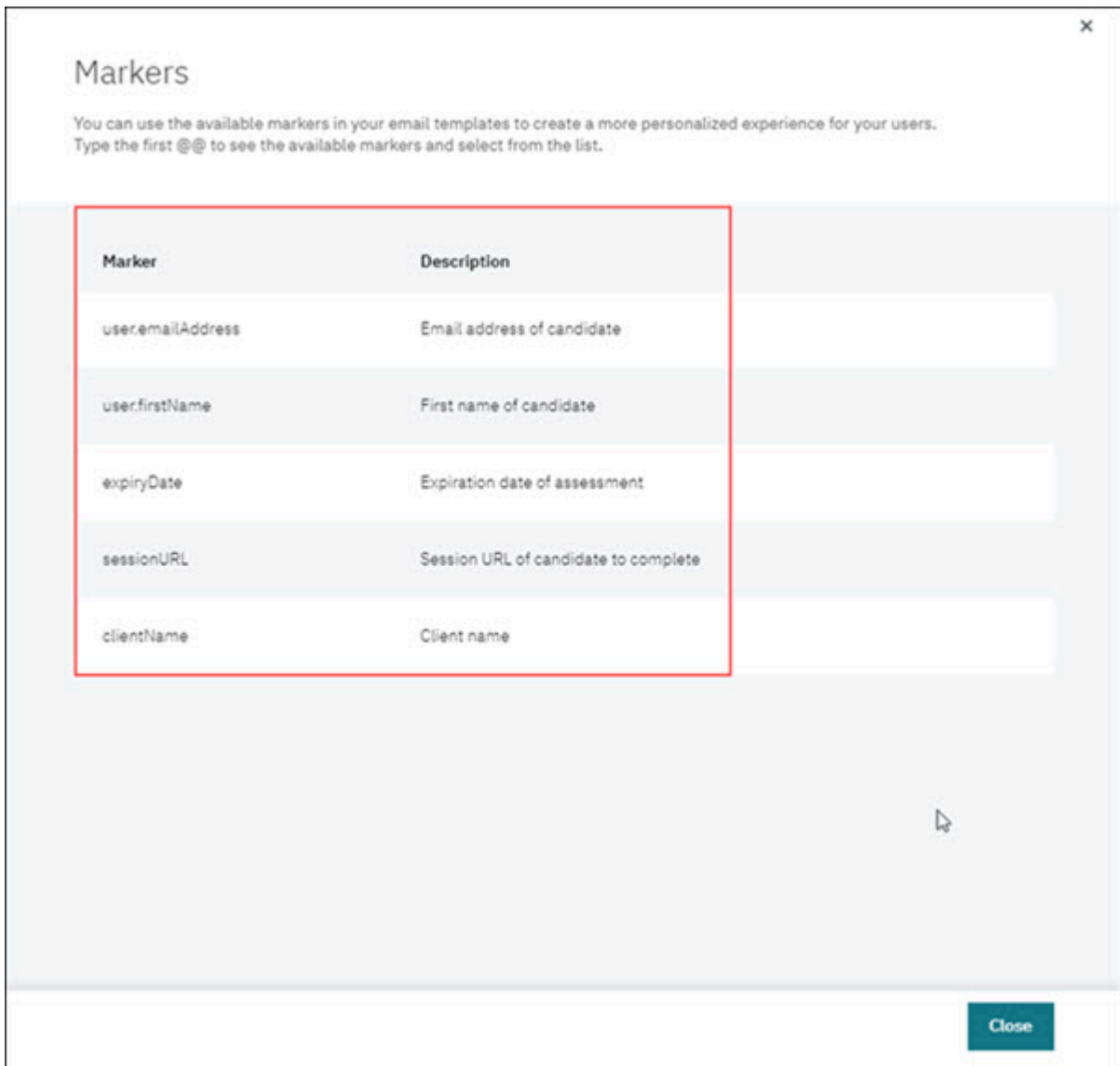


Figure 65. Marker Descriptions

Language

The list of languages are based on languages enabled for that client in Talent Suite/Application. Each of these languages will have a **Published** status associated with it if the specific template is already published in that language, otherwise, the language will not have the published status.

Note: More information on the languages status can be seen by selecting the **View Details** link in front of the template ID.

Sender email address

The Sender email address is required, not optional. This is to prevent email spamming so the sender cannot pretend to be something they are not. Most of the time the Sender email address will be entered as a Marker so a different value comes through each time the email is sent.

Recipient Details

Recipient Details displays the Display Name value of the From field and any Markers added. The Recipient email address requires an email marker or valid email address.

Subject line

The **Subject line** accepts Markers such as someones name. This field is mandatory.

Body Editor

The **Body** editor has editing capabilities that allows the user to format text, import content, create links, insert images, and create or import HTML source code. The HTML Source is generated from the editor itself or allows the user to paste HTML in the Body editor field. The user can toggle from the HTML source code by selecting **HTML Source** to see what the HTML looks like. You can make changes directly in the HTML, however there is a preventative in place to sanitized the code and remove anything that should not be allowed.

Publishing

When publishing, a dialog window displays to confirm if you want to publish. If you select cancel in the publish confirmation dialog window, a dialog window asks if you are sure you want to cancel your changes without saving. This also occurs if you select the browser back button or if you change a language as well. The **Change to <language name>** dialog window asks if you want to save changes to language. Once published, a confirmation messages displays to confirm the publish.

Screen View

In a small screen view (such as an iPad) the user has to select the **X** icon to insert the Marker. The drag and drop function will not be available.

Procedure

To edit,

1. Select the **email template name** of the email template you wish to edit. This opens the email template in the **Edit** window.

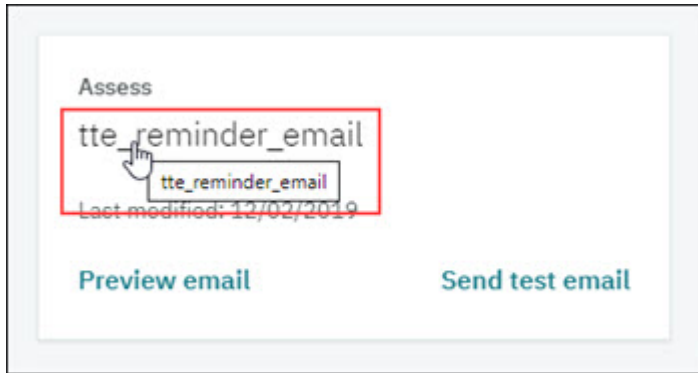


Figure 66. Email Template Edit window

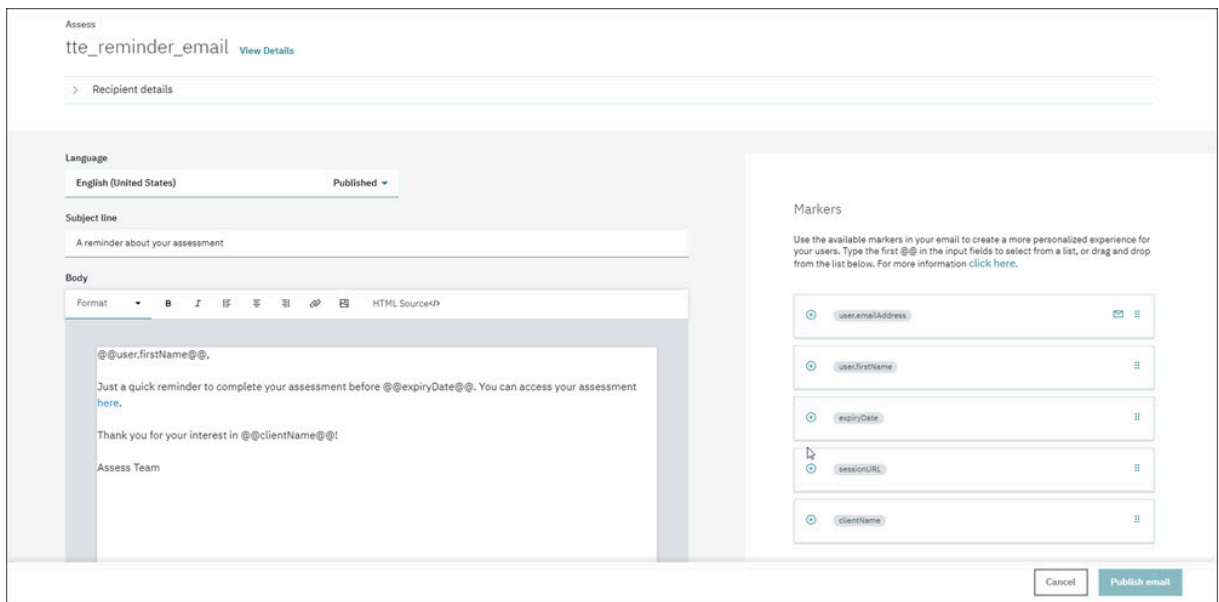


Figure 67. Edit window

Note: On smaller screens the marker list is not displayed. Markers are instead accessed through a **Markers** icon within the editor. Once selected, a slide-out **Add markers** window opens with the list of Markers with the **+** icon used to add them to the subject/body wherever the cursor is placed prior to selecting the Markers icon.

To view details,

2. Select the **View Details** link next to the email template title. The View Details window opens to display the Date Created, Template ID, Last Modified date, and the list of languages published.

Note: View Details is high level and gives the date the email template was created, the languages that are supported, and the languages that have been published for the email. English (United States)

is the default language. If the language displays **Yes** it has been published. If the language displays **No** it has not been published.

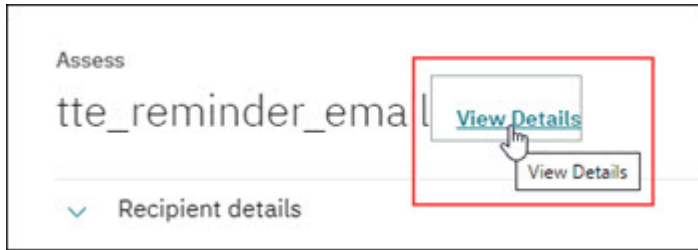


Figure 68. View Details link

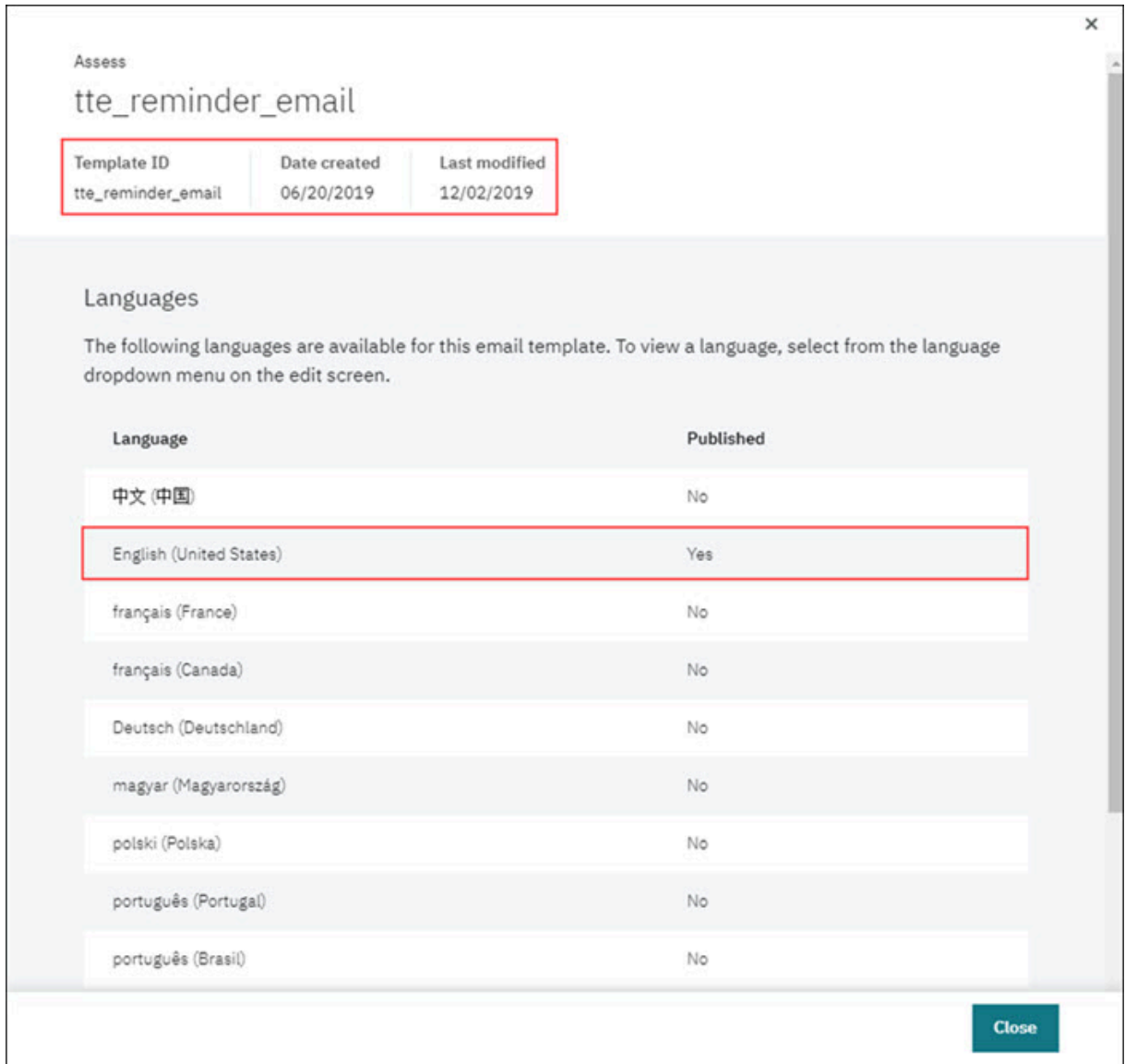


Figure 69. View Details window

3. Select **Close** to close the View Details window.

Edit the following sections as required.

4. **Recipient details:** To edit this section, select **Edit**. The Edit window opens with the available Recipient details Markers.

Important: The Recipient email address requires an email marker or valid email address.



Figure 70. Recipient details - select **Edit**

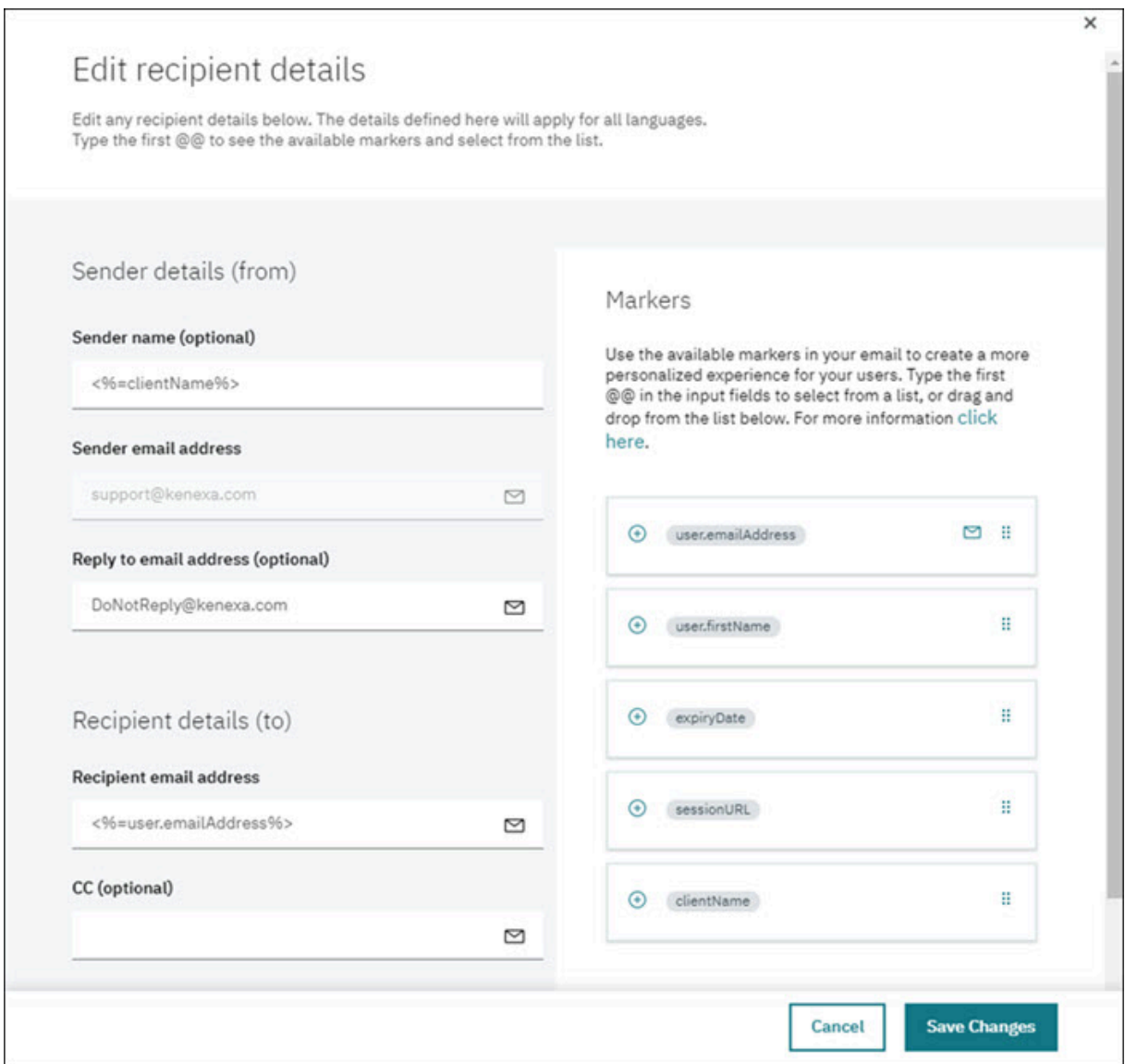


Figure 71. Edit window

Note: On smaller screens the marker list is not displayed. Markers are instead accessed through a **Markers** icon within the editor. Once selected, a slide-out **Add markers** window opens with the list of

Markers with the + icon used to add them to the subject/body wherever the cursor is placed prior to selecting the Markers icon.

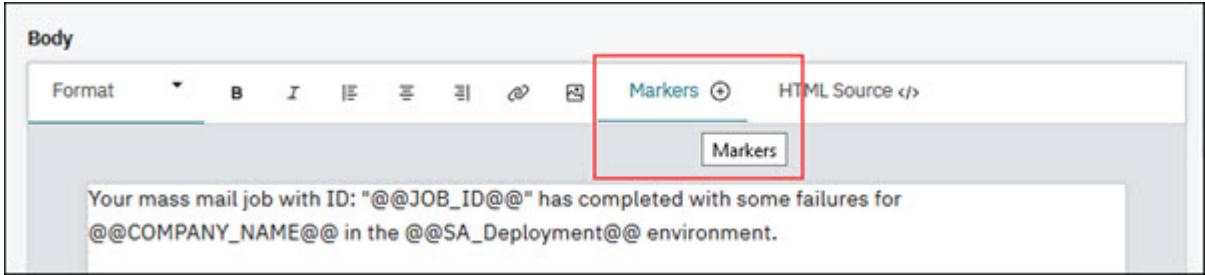


Figure 72. Marker icon

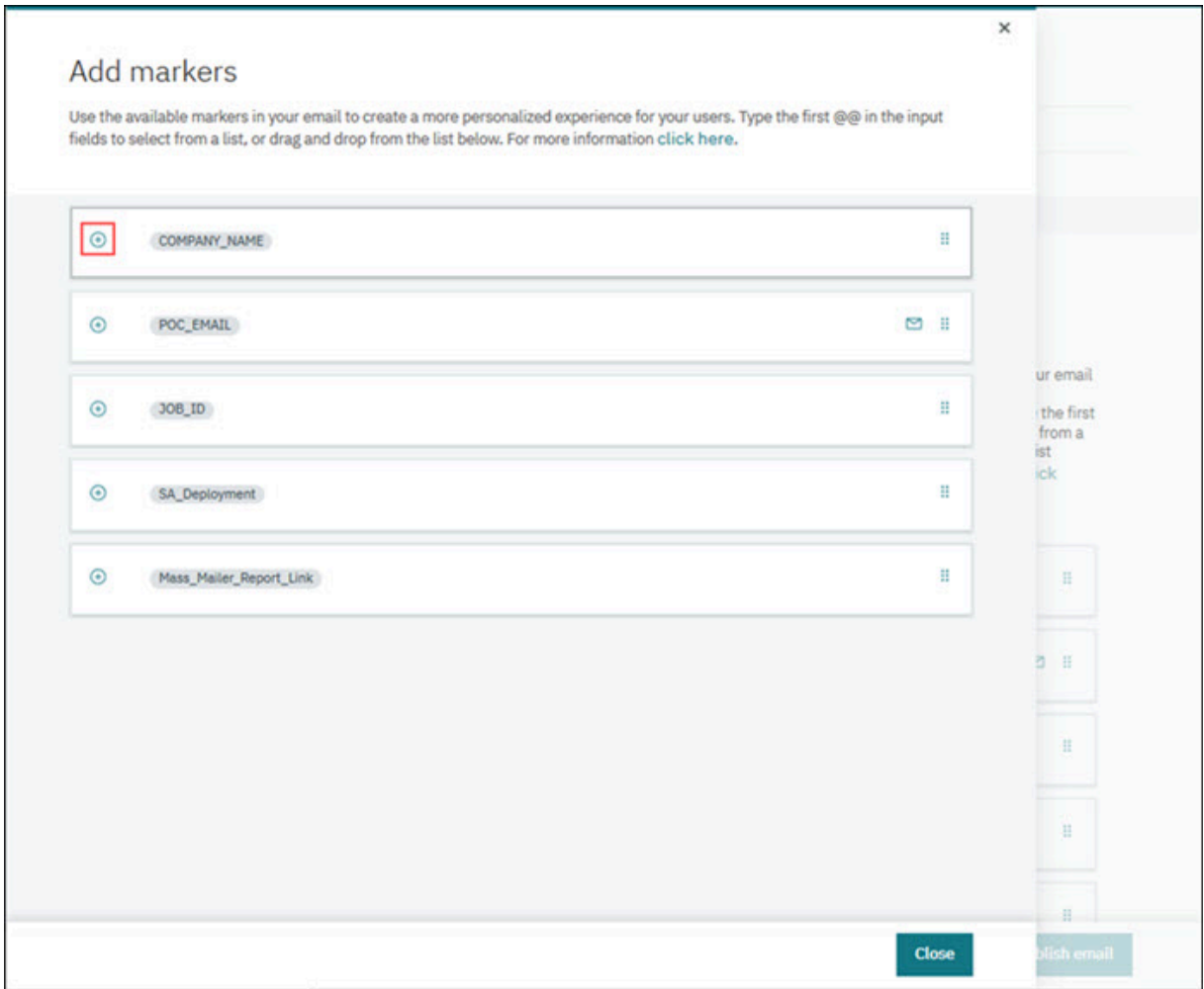


Figure 73. Slide-out Add markers window

5. To update or add Markers, select a Marker from the **Markers** section and either select the **X** icon to insert the Marker at the cursor point or drag and drop the Marker to the desired field.

Note: To hard code an email address for a field, enter a valid email address for an individual or mailing list.

Important: A valid email address or Marker must be added to all required fields.

6. Select **Save Changes** to save your changes or **Cancel** to exit without saving.

Note: An error message displays when trying to save if there are problems with a Marker in a field.

7. **Language:** To add additional languages for the email template, select the **Language** drop down menu and select a language.

Note: If a language has been published, **Published** displays next to the language in the **Language** drop down menu.

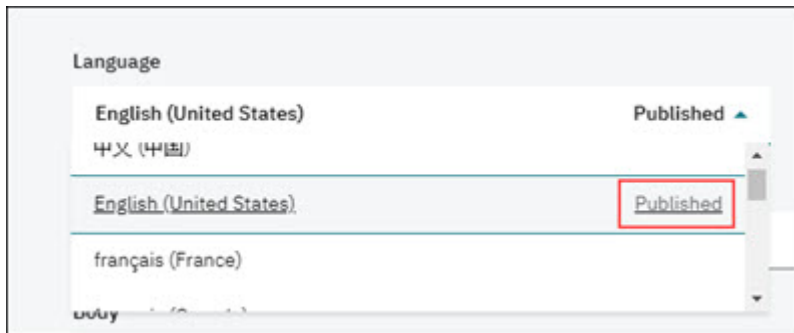


Figure 74. Language drop down menu

In the Subject line field,

8. Enter a subject description and/or add the desired **Marker** from the **Markers** section.

Note: Markers can be dragged and dropped from the Markers list or added by selecting the plus + icon for the specified Marker in the Marker section to place the Marker at the cursor point of placement. Markers are displayed with the @ symbol or greater than, percent symbol/less than, percent symbol (<%markerName%>).

In the Body editor field,

9. Enter the text content, images, and links for your email.

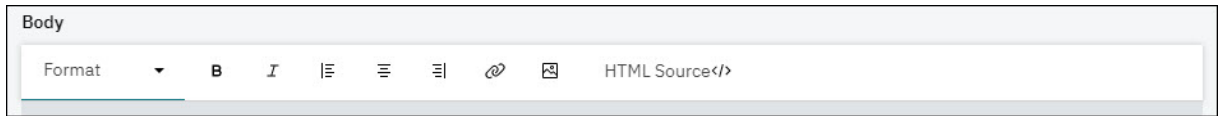



Figure 75. Body editor field Edit options

- a) To format your text, select the one of the **Format** options (**B**, **I**, text alignment)
- b) Select the **link** icon  to insert a URL. The Add link dialog window open requesting Text to display and a **Web address (URL)**. Enter the applicable items, then select **Apply** to add your web link.

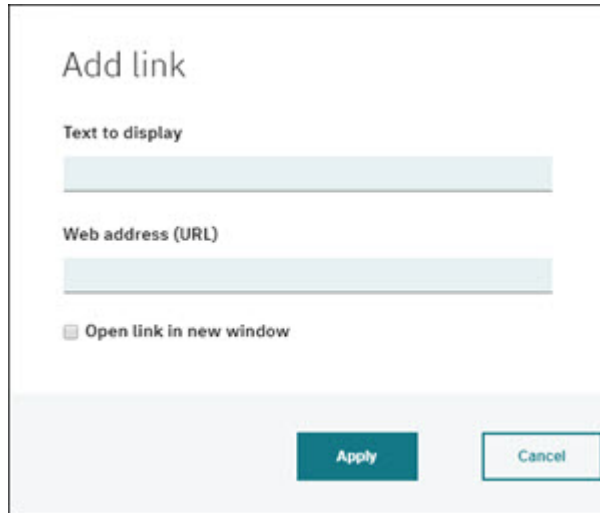



Figure 76. Add link dialog window

- c) Select the **image** icon  to insert an image. The **Add image** dialog window opens requesting a **Web address (URL)**, **Alternate text**, **Width**, **Height**, and **Image alignment**. Enter the applicable items, then select **Add** to add your image.

The image shows a dialog box titled "Add image". It contains the following fields and options:

- Image properties**
 - Web address (URL) to image:** A text input field with a vertical cursor.
 - Alternate text:** A text input field.
 - Width (px):** A text input field.
 - Height (px):** A text input field.
- Image alignment:** Three radio button options: None, Left, and Right.

At the bottom of the dialog are two buttons: "Add" (highlighted in teal) and "Cancel".

Figure 77. Add image dialog window

- d) Select **HTML Source** to either view the existing content in HTML mode or paste the desired HTML code for your email.

Tip: Edits can be made directly in the HTML source code view. You may view the HTML Source code or the HTML by selecting **HTML Source** to toggle the code view.

10. Add **Markers** as needed to the **Body** editor field.

The image shows a rich text editor window titled "Body". The toolbar includes "Format", bold (B), italic (I), bulleted list, numbered list, link, and image icons. The text area contains the following content:

- @@user.firstName@@,
- Just a quick reminder to complete your assessment before @@expiryDate@@. You can access your assessment [here](#)
- Thank you for your interest in @@clientName@@.
- Assess Team

Red boxes highlight the markers @@user.firstName@@, @@expiryDate@@, and @@clientName@@. A blue box highlights the link text "here".

Figure 78. Sample email with Markers and links

Once your updates have been completed,

11. Select **Publish email**. A confirmation dialog window displays to confirm changes you have made and warns "Updates will be reflected in the product immediately."

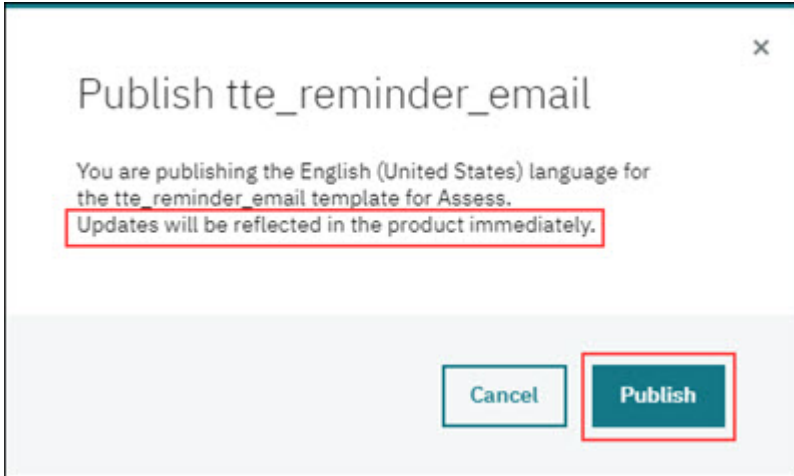


Figure 79. Publish dialog window

12. Select **Publish** in the dialog window. A confirmation message displays stating the email template has been published.

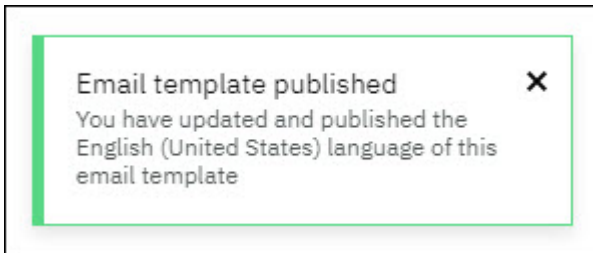


Figure 80. Publish confirmation message

Note: Email templates may be edited again after publication.

Send Test Email

The **Test Email** function allows the user to view how the email would appear to the recipient in read only format.

About this task

The details are displayed along with the substitutes for the various markers.

Procedure

On the Manage email templates page,

1. Select **Send test email** in the applicable email template card. The **Send test email** page opens for that email template.

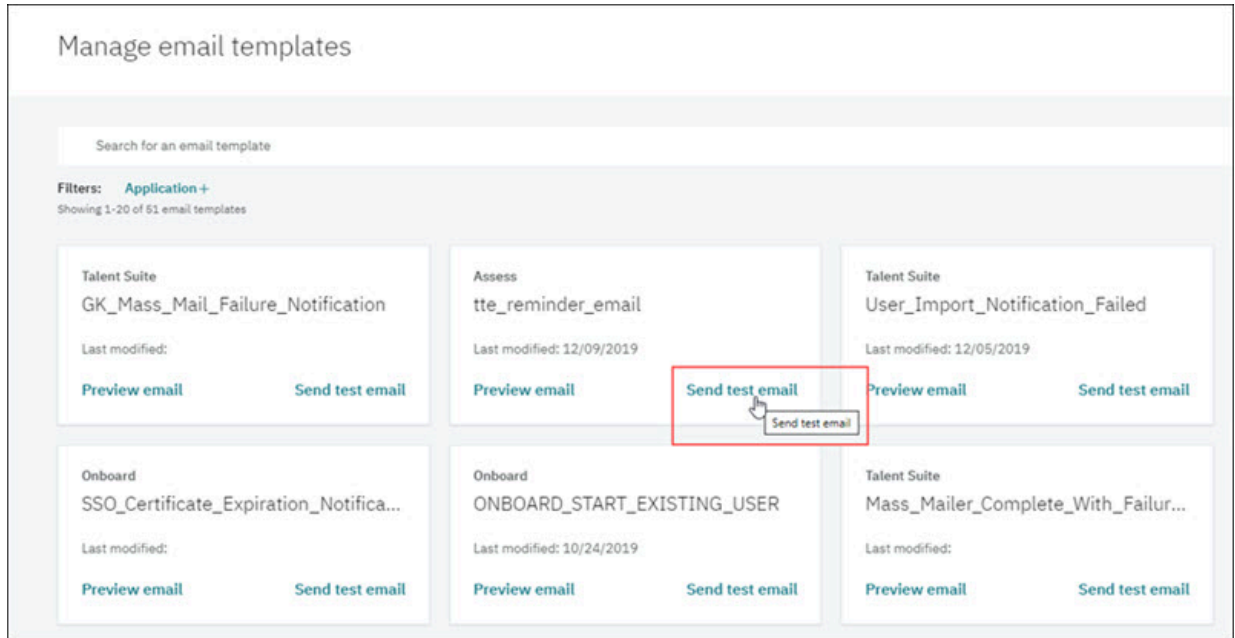


Figure 81. Select Send test email

Send test email for tte_reminder_email template

Language
English (United States)

Marker values for your test email

Provide values for the markers shown below to use how these will reflect in your test email.

@@user.emailAddress@@
Email address of candidate
@@user.emailAddress@@

@@user.firstName@@
First name of candidate
@@user.firstName@@

@@expiryDate@@
Expiration date of assessment
@@expiryDate@@

@@sessionURL@@
Session URL of candidate to complete
@@sessionURL@@

@@clientName@@
Client name
@@clientName@@

Email details

To (recipient email) From (email address) Reply to (email address)
<%=user.emailAddress%> support@kenexa.com DoNotReply@kenexa.com

CC BCC

Subject line
A reminder about your assessment

@@user.firstName@@,
Just a quick reminder to complete your assessment before @@expiryDate@@. You can access your assessment [here](#).
Thank you for your interest in @@clientName@@!
Assess Team

Cancel Send test email

Figure 82. Sent test email page

In the Marker values few your test email section,

2. Change content in the various marker fields that require an update (if applicable).

Note: The Marker fields that have been changed will update in real time and display in the test email preview pane.

After any changes are made,

3. Select the **Send test email** button. A success message displays.

Note: The user is sent back to the default **Manage email templates** page. They will then receive the test email in their email application.

Available Email Templates

There are specific email templates available for each application. This section describes each email template by application.

<i>Table 26. Talent Suite Available Email Templates</i>	
Email Template Name	Email Template Description
Access_Code	This template provides the access code to the user when Two-Step Authentication feature is enabled.
Account_Update_Notification	This template notifies the owner of the original email address that the email address for their user has been requested to change when Email Verification feature is enabled.
Account_Update_Verification	This template is to request the owner of the new email address verify their access to that email address before updating the user to the new email address when Email Verification feature is enabled.
Approve_Proxy_Connection	This template notifies a user that they are responsible for approving or rejecting an IBM support user's proxy access when Proxy feature is enabled. Note: THIS FEATURE IS NOT CURRENTLY IMPLEMENTED.
Forgot_Password	This template is for a user to reset their forgotten password when Security Challenge Questions feature is disabled.
Forgot_Password_with_Challenge_Questions	This template is for a user to reset their forgotten password when Security Challenge Questions feature is enabled.
GK_Mass_Mail_Failure_Notification	This template notifies someone when a mass mail job has a system failure and can not complete.
Mass_Mail_Success_Notification	This template notifies someone that the mass mail job has completed successfully with no failures.
Mass_Mailer_Cancelled_Notification	This template notifies someone that the mass mail job that was running was canceled.
Mass_Mailer_Complete_With_Failures_Notification	This template notifies someone that the mass mail job complete but that there was failures. It includes a link for them to download the report and identify the issues.
New_User_Created	This template notifies a user they have been granted access to the Talent Suite and for them to set their password.
Rehire_User	This template notifies a user that has been rehired how to access their account.
Reset_Password	This template is used to reset their password.
Reset_User	This template is used to reset a user.
User_Export_Canceled	This template notifies someone when a User Export has been canceled.

Table 26. Talent Suite Available Email Templates (continued)

Email Template Name	Email Template Description
User_Export_Notification	This template notifies someone when a User Export has completed and provide a link to the file for download.
User_Import_Canceled	This template notifies someone when a user import has been canceled.
User_Import_Notification	This template notifies someone when a user import completes with no failures.
User_Import_Notification_Failed	This template notifies someone when a user import has a system failure and cannot completed.
User_Import_Notification_Failure_Report	This template notifies someone when a user import completes with failures. This email contains a link for them to access the Failure Report so they can make changes and fix the issues.

Table 27. Onboard Available Email Templates

Email Template Name	Email Template Description
Bulk_Communication	
Bulk_Communication_No_CC	
DHS_Reverify_Alien_Permanent_Resident	To be sent to New HIre if I-9 Section is reopened from the E-Verify Activity, for the DHS REVERIFY ALIEN/PERMANENT RESIDENT status
DHS_Reverify_Citizen	To be sent to New Hire if I-9 Section is reopened from the E-Verify Activity, for the DHS REVERIFY CITIZEN status
DHS_Reverify_DMV	To be sent to New Hire if I-9 Section is reopened from the E-Verify Activity, for the DHS REVERIFY DMV status
I9_RECEIPT_USED_NEW_HIRE_NOTIFICATION	To be sent to New Hire If I-9 Section 2 is completed with a Receipt (for any document).
ONBOARD_START_EXISTING_USER	To be sent to New hire when completing Onboard Start for an applicant with a Talent Suite SSO (previously successful completion of Onboard Start)
Preinitiate_Everify	To be sent to the New Hire if I-9 Section 1 is reopened from the E-Verify Activity, before the case has been initiated.
Primary_HM_Default_Form_Completed	To be sent to the Primary Hiring manager when Forms are conditioned on an activity in a workflow; and no condition is met to display a PDF.
SSA_Resubmittal	To be sent to New hire If I-9 Section is reopened from the E-Verify Activity, at the SSA RESUBMITTAL status

Table 27. Onboard Available Email Templates (continued)

Email Template Name	Email Template Description
SSA_Reverify	To be sent to New hire If I-9 Section is reopened from the E-Verify Activity, at the SSA REVERIFY status
System_Admin_Multiple_Form_Conditions_Met	To be sent to administrator when Forms are conditioned on an activity in a workflow, if more than one condition is met to display a PDF
System_Admin_No_Form_Condition_Met	To be sent to administrator when Forms are conditioned on an activity in a workflow, if no condition is met to display a PDF.
Task_Claim_Notification	Email is sent to all previous task owners.; when a user with the capability to claim a task selects the Claim Task action from a new hire context menu.
TASK_I9_APPROVER_ASSIGNMENT_NOTIFICATION	If I-9 Section 1 is completed with a Internal approver identified, the email will be sent to the approver notifying them of action required for completion of I-9 Section 2.
TASK_I9_THIRD_PARTY_APPROVER_NOTIFICATION	If I-9 Section 1 is completed with a Third Party identified, the email will be sent to the Third Party notifying them of action required for completion of I-9 Section 2.
TASK_I9_THIRD_PARTY_NEW_HIRE_NOTIFICATION	If I-9 Section 1 is completed with a Third Party identified, the email will be sent to the New Hire notifying them of action required for completion of I-9 Section 2.
TASK_OVERDUE_NOTIFICATION	Based on the configuration, this email will be sent to the user 'N' days AFTER the task due date.
TASK_REMINDER_NOTIFICATION	Based on the configuration, this reminder email will be sent to the user 'N' days BEFORE the task due date.
Task_Reminder_Email	
Task_Reopen_Default_Notification	This email is ONLY sent to the owner of the task, if they are not the user taking the reopen action.
Task_Reopen_I9_Section_One	When the I-9 Section 1 is reopened from I-9 Section 2 this email is sent to the new hire responsible for Section 1.
Task_Resume_I9_Section_Two	When an I-9 Section 1 is reopened from I-9 Section 2, this notification is sent after the successful completion of I-9 Section 1.
Task_Resume_Default_Notification	Email will be sent when a task is resumed from a suspended state (currently only for I-9 Section 2 and Everify in specific use cases).
W4_Allowances_Notification	When the W-4 form is filled out and signed and submitted to the Talent Suite an email is automatically generated if the employee has over 9 allowances.

Table 27. Onboard Available Email Templates (continued)

Email Template Name	Email Template Description
W4_SSN_Last_Name_Different_Employee	When the W-4 form is filled out and signed and submitted to the Talent Suite two emails are automatically generated if the employee claims that his/her name is different than what appears on his/her social security card. This is sent to the EMPLOYEE.
W4_SSN_Last_Name_Different_Employer	When the W-4 form is filled out and signed and submitted to the Talent Suite two emails are automatically generated if the employee claims that his/her name is different than what appears on his/her social security card. This is the EMPLOYER email.
Update_I9_Everify	If I-9 Section is reopened from the E-Verify Activity, at the Duplicate Case status, the following email is sent.

Table 28. Assess Available Email Templates

Email Template Name	Email Template Description
tte_invite_email/3pm_tte_invite_email	This template is used to provide candidates, with the Email Distribution method, their assessment information.
tte_manager_report_email/3pm_tte_manager_report_email	This template is used to provide Managers/Assess Admins the scoring details of assessments completed by candidates.
tte_report_email/3pm_tte_report_email	This template is used to provide candidates the scoring details of the assessments they completed.
tte_reminder_email	This template is used to remind candidates about the assessments they need to complete before they expire.
utg_weekly_alert_notification_email	This template is to send the UTG usage information detail of Sales reps.
tte_report_no_links_email/3pm_tte_report_no_links_email	This template is used when there is no candidate facing report available for the assessment. This template informs the candidate that their assessment has been completed.
utg_monthly_overage_email	Project Office will receive monthly report which contains the list clients reached overage.
utg_weekly_warning_email	IBM Renewal reps and BPs will receive weekly report which contains the list of clients in warning and reached the overage.

Error Handling

There is error handling built in that displays error messages to ensure fields, markers, content, etc. are correctly in place before publishing an email template.

About this task

Following is a list of error messages and their description.

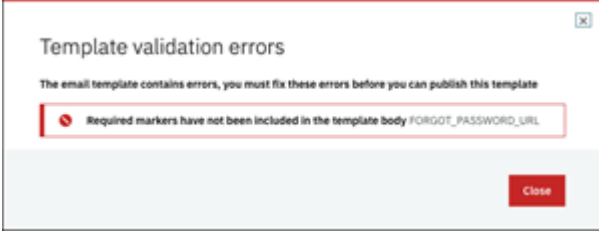
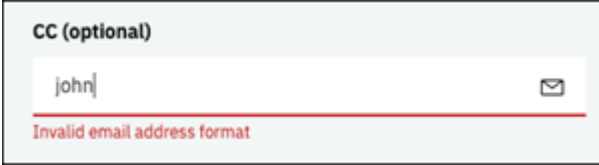
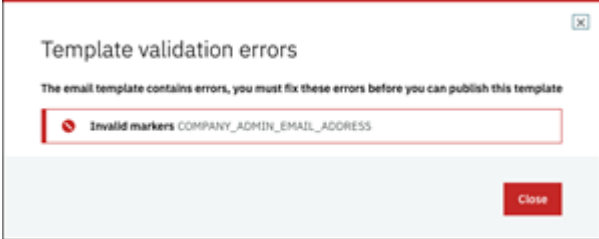
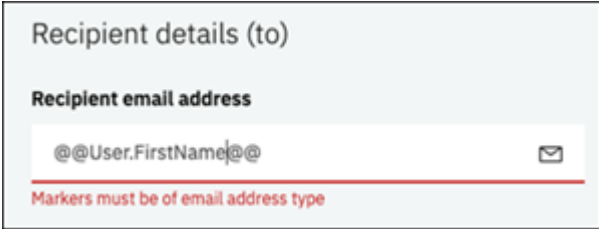
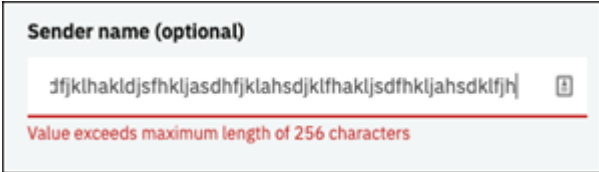
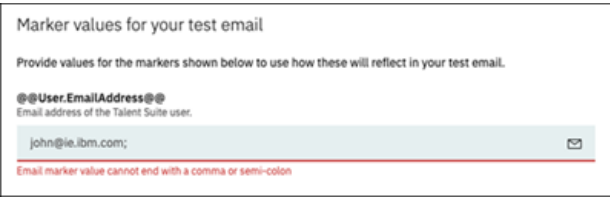
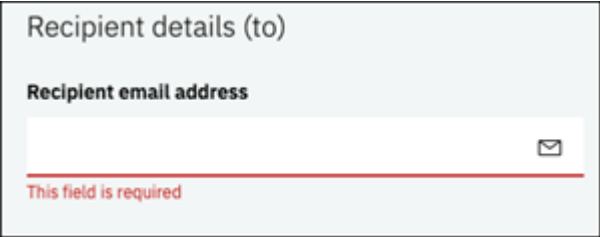
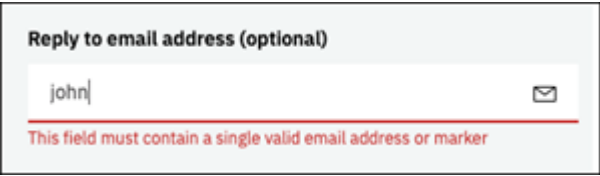
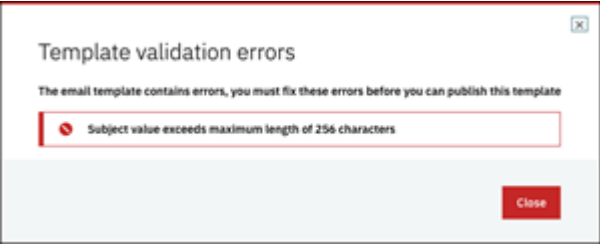
Table 29. Error Handling	
Error Messages	Description
<p>Required markers have not been included in the template body.</p> 	<p>Certain markers have been designated as required by the application team and must be used in that email template.</p> <p>Note: If you see this message you may need to add newly required fields to your email template.</p>
<p>Invalid email address format.</p> 	<p>All email address fields must contain a valid email address.</p>
<p>Invalid markers.</p> 	<p>If a user uses the marker format but reference an invalid marker they will see this error.</p>
<p>Markers must be of email address type.</p> 	<p>Fields that have been designated as email fields can only be populated by email type markers or valid email addresses.</p>
<p>Value exceeds maximum length of 256 characters.</p> 	<p>Fields have a maximum length of 256 characters.</p>

Table 29. Error Handling (continued)

Error Messages	Description
<p>Email marker value cannot end with a comma or semi-colon.</p> 	<p>Email markers can normally be entered as a list but cannot end with a list separator.</p>
<p>This field is required.</p> 	<p>Shown when a required field (one that does not have optional beside it) has been left empty.</p>
<p>This field must contain a single valid email address or marker.</p> 	<p>The reply to field can only have one valid email marker or email address.</p>
<p>Subject value exceeds maximum length of 256 characters.</p> 	<p>The subject cannot be longer than 256 characters.</p>

Procedure

Take the necessary steps to correct the error shown in the error message(s).

Correspondence Management

Correspondence is managed via the Talent Suite application. Users can review and manage emails sent out by the Talent Suite application triggered during a user import.

The Search Email History feature is used to verify if a user has received the email sent out by the Talent Suite application.

Search Email History

Search Email History provides a way to review what emails have been sent out by the Talent Suite Application, so that the user can verify and troubleshoot cases where a user claims to not have received an expected communication.

About this task

Emails are triggered and sent out during a user import, user creation, user export, and Reset/Create password functions. In certain cases, if users and groups of users report that they have not received an email, the administrator user can use the Search Email History function to easily identify whether the email was sent and/or when the email was sent out.

The Search Email History function provides a list of all the email activity history on the Correspondence Management screen. The user can search emails based on certain criteria.

Procedure

From the Admin page,

1. Select **Correspondence > Search Email History** in the navigation menu to launch the configuration settings shown in the following figure. The Search Email History page opens.

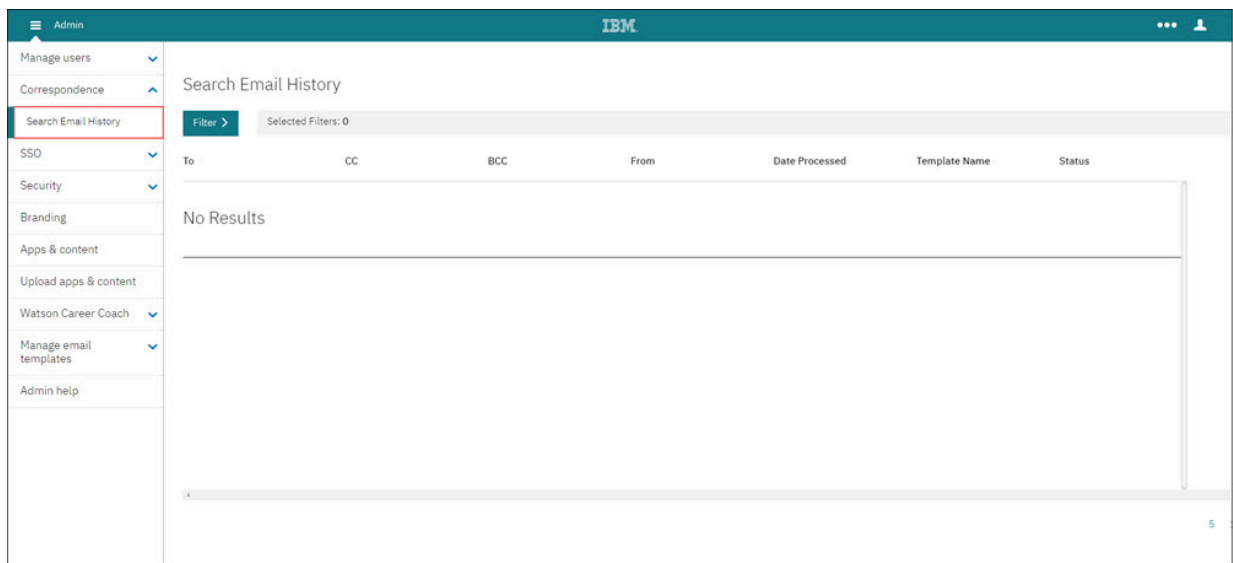
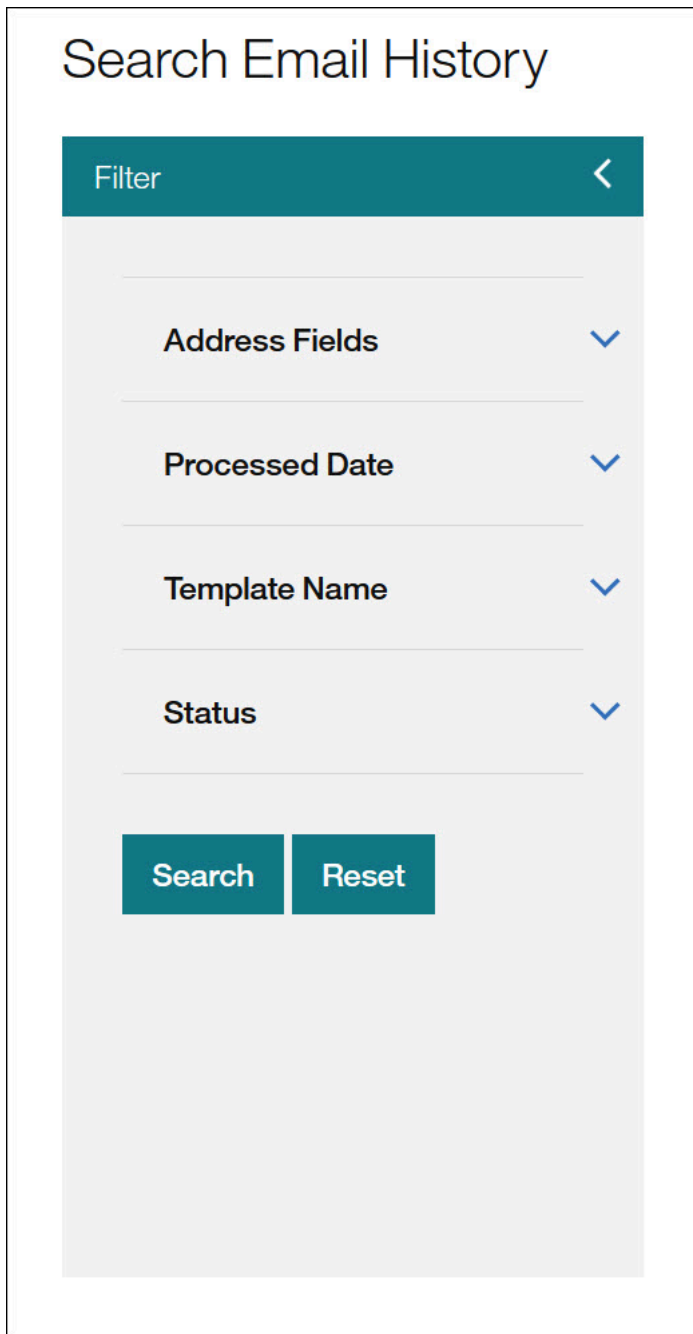


Figure 83. Search Email History landing page

2. Select the **Filter** arrow to expand the following fields and enter all applicable search criteria.

- Address Fields
- Processed Date
- Template Name
- Status



The screenshot shows a mobile application interface titled "Search Email History". At the top, there is a teal header bar with the word "Filter" on the left and a white left-pointing chevron icon on the right. Below the header, the filter options are listed in a light gray container, each with a blue downward-pointing chevron icon to its right: "Address Fields", "Processed Date", "Template Name", and "Status". At the bottom of the filter container, there are two teal buttons: "Search" and "Reset".

Figure 84. Search Email History - Filter fields

3. Select **Search**. The search results populate in the table with the number of total search results displayed.

Note: The user can navigate multiple search results pages using the page number back and forth arrows.

The screenshot displays the 'Search Email History' interface. On the left, there is a 'Filter' sidebar with sections for 'Address Fields' (containing 'Processed Date' with 'From' and 'To' date pickers), 'Template Name', and 'Status'. Below these are 'Search' and 'Reset' buttons. The main area shows 'Selected Filters: 2' and '1 - 10 of 10485 results'. A table lists search results with columns: To, CC, BCC, From, Date Processed, Template Name, and Status. The table contains six rows of data. At the bottom, there is a pagination control showing page 1 of 1049 and a dropdown menu for results per page (5, 10, 25, 50, 100).

To	CC	BCC	From	Date Processed	Template Name	Status
autaprsun043017105114@mailinator.com			support@kenexa.com	2017-05-01	New_User_Created	SENT
autaprsun0430171010212@mailinator.com			support@kenexa.com	2017-05-01	New_User_Created	SENT
autaprsun0430171002119@mailinator.com			support@kenexa.com	2017-05-01	New_User_Created	SENT
autaprsun0430171027815@mailinator.com			support@kenexa.com	2017-05-01	New_User_Created	SENT
autaprsun0430171009114@mailinator.com			support@kenexa.com	2017-05-01	New_User_Created	SENT
autaprsun0430171017416@mailinator.com			DoNotReply-gke@mail.us.ibm.com>	2017-05-01	TASK_IB_THIRD_PARTY_NEW_HIRE_NC	SENT

Figure 85. Search Results

4. Select **Reset** to remove search criteria from the Filter fields.

5. Select **Sent** in the **Status** field to open the **Email Details** window to view details of the sent email.

Email Details ✕

<p>To: autaprsun0430171017519@mailinator.com</p> <p>CC: N/A</p> <p>BCC: N/A</p> <p>From: DoNotReply@Kenexa.com</p> <p>ReplyTo: DoNotReply@Kenexa.com</p>	<p>Template Name: TASK_I9_THIRD_PARTY_APPROVER_NOTIFICATION</p> <p>Locale: en_US</p> <p>Status: SENT</p> <p>Date Processed: 2017-05-01</p> <p>Last Attempted: 2017-05-01</p> <p>Date Sent: 2017-05-01</p>
---	---

Subject:
Form I-9 Assistance Required for New Employee - Elaine-Gen'abc defghklmop Goodell-Gen'abc defghklmopqrstuvwxyzabcd

Body:
Dear Third-Gena'abc defghklmop Party-Genll'abc defghklmopqrstuvwxyzabcd,

You have been identified as an authorized representative that will complete Section 2 of Form I-9 for the new employee Elaine-Gen'abc defghklmop Goodell-Gen'abc defghklmopqrstuvwxyzabcd. Please utilize the link below to access and complete the I-9 Form.

[https://qa-wylb.talentsuite.swglab.ibm.com/wps/myportal/\\$tenant/iqaTestclient?uri=kx%3AI9_SECTION_TWO%3A4E5B695800A31267E053CB096209EF92](https://qa-wylb.talentsuite.swglab.ibm.com/wps/myportal/$tenant/iqaTestclient?uri=kx%3AI9_SECTION_TWO%3A4E5B695800A31267E053CB096209EF92)

If you are a have not used our system before a separate email will be sent with your login credentials. Once you have successfully accessed the system, please follow the instructions to complete the form. For guidance on how to complete section 2 properly, please reference the USCIS website [here](#). Thank you for your assistance.

Figure 86. Email Details window

Chapter 6. Security Configuration

Security configuration for the Talent Suite is defined by the user type. This section defines user types and the Admin functions associated to them.

The following sections describe specific Security features.

- Password Policies
- 2-Step Verification

How to Configure Password Policies Settings

The Password Policy defines the client's password strength and security behavior during authentication. There are a defined group of settings for each client that can be customized to fit security requirements.

Specific Password Policy settings are configured across the Talent Suite as follows.

Navigation

This section describes the configuration of password policies in the Talent Suite.

Procedure

From the Admin page,

1. Select **Security > Password Policies** in the navigation menu to launch the Password Policies page shown in the following figure.

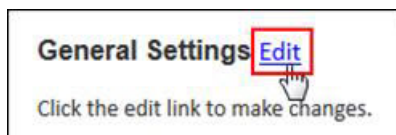
The following Password Policy configuration options are available:

- General Settings
- Lock Out Settings
- Connection Settings



Figure 87. Admin - Password Policies page

2. Select the Edit hyperlink to expand the specific function you wish to configure.



General Settings Configuration

This section describes how to configure the General Settings for Password Policies.

Procedure

1. Select the **Edit** icon to expand the Edit General Settings configuration section.

Figure 88. Edit General Settings configuration

2. Enter in the appropriate configurations for the following fields:

Field Name	Description
Complexity	<p>When ON the password must:</p> <ul style="list-style-type: none"> • Contain at least 8 - 20 characters using at least one special character: ` ! @ \$ % ^ & * () - _ = + [] ; : ' " , < . > / ? " (whereas the minimum password length is 8 [configurable]) • Contain both UPPER CASE (A-Z) and lower case (a-z) alphanumeric characters. • Contain at least one numeric character 0-9 • Must NOT contain the user's username.
Expires Every	<p>The number of days a password must be active before changing.</p> <p>0 = The password can be changed at any time.</p>

Table 30. Edit General Settings fields(continued)	
Field Name	Description
Length	The length of characters a password must be. Note: The minimum character length is 8.
Remember Last	How many passwords the system will remember. Note: A user cannot use a previously remembered password. 0 = No passwords are remembered.

3. Select **Save Changes** upon completion to save configuration settings.

Lock Out Settings Configuration

This section describes how to configure the Lock Out Settings for Password Policies.

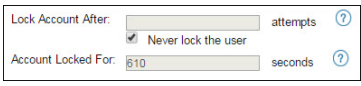
Procedure

1. Select the **Edit** icon to expand the Lock Out Settings configuration section.

Figure 89. Lock Out Settings configuration

2. Enter in the appropriate configurations for the following fields:

Table 31. Edit Lock Out Settings fields	
Field Name	Description
Lock Account After	How many times a login can fail before the account is locked out. 0 = The account is never locked out.

Table 31. Edit Lock Out Settings fields (continued)	
Field Name	Description
Never lock the user 	<p>Gives the option to never lock the user.</p> <p>Select the Never lock the user option if you want your users to never experience a locked account.</p> <p>When selected, the Lock Account After and Account Locked For fields are grayed out (disabled) so that it's obvious these fields are no longer applicable.</p> <p>If unselected, the Lock Account After and Account Locked For fields become active again.</p> <p>Note: When Never lock the user is selected, the Lock Account After field does not permit the value of 0. If 0 is entered, the message The Lock Account After field requires a value greater than 0 for the number of attempts. displays.</p> <p>Important: Be advised that this option will give anyone unlimited attempts to authenticate, which will compromise security and is not recommended.</p>
Account Locked for	<p>The length of time an account stays locked before unlocking itself.</p> <p>0 = The account instantly unlocks.</p>

3. Select **Save Changes** upon completion to save configuration settings.

How to Configure 2-Step Verification

2-Step Verification is for users who wish to enhance their security policy for the Talent Suite. Enabling 2-Step Verification increases the level of security required during the user login process.

User Administrators can enable 2-Step Verification configuration to either enable 2-Step Verification for all users or for only a subset of users (based on user category). Expiration of the passcode can also be configured.

Enabling 2-Step Verification increases the level of security required during the user login process.

Once enabled, end users are required to successfully complete two steps during the user login process before access can be granted to the application.

Step 1: The user enters their Username and Password.

Step 2: The user must enter the passcode that was emailed to them.

Navigation

This section describes navigation steps to access the 2-Step Verification functions in the Admin application.

Procedure

From the Admin application navigation menu,

1. Select **2-Step verification** under the Admin application **Security** menu item in the navigation menu to launch the configuration settings shown in the following figure. The Configure 2-Step Verification page opens.

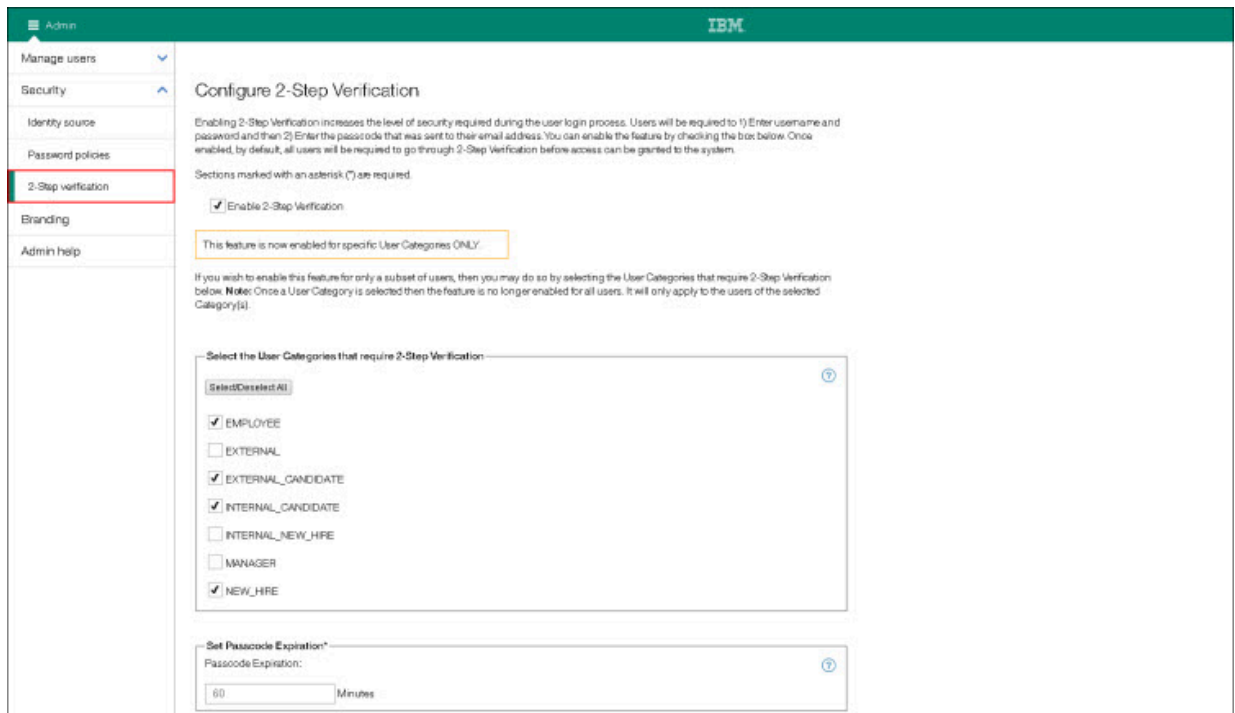


Figure 90. Configure 2-Step Verification page

2. Continue to the [“2-Step Verification Configuration Settings”](#) on page 123 section for SSO Login configuration steps.

2-Step Verification Configuration Settings

This section describes the process configuration steps for 2-Step Verification on the **Configure 2-Step Verification** page.

About this task

During the login process for 2-Step Verification, the user is challenged with a second step which requires entry of a provided six digit passcode before access is granted.

Once the user successfully authenticates with their username and password, the system automatically sends a randomly generated six digit passcode to the email address on file for the user. The user then logs in using the passcode sent to them to access the system. A new password can be requested by the user for their next login.

A master setting can be enable or disable the 2 -Step Verification.

- Default is disabled.
- Enabling the feature enables it for all users by default.

The setting can be configured to specify if only certain user categories require 2-Step Verification.

The setting can be configured to specify the life of the passcode.

Procedure

To configure and enable 2-Step Verification,

1. Select the **Enable 2-Step Verification** check box. This activates all fields for the **Select the User Categories that require 2-Step Verification** and **Set Passcode Expiration*** sections.

Note: All fields marked with an asterisk (*) are mandatory. Once enabled, by default, it will be enabled for all users.

Configure 2-Step Verification

Enabling 2-Step Verification increases the level of security required during the user login process. Users will be required to 1) Enter username and password and then 2) Enter the passcode that was sent to their email address. You can enable the feature by checking the box below. Once enabled, by default, all users will be required to go through 2-Step Verification before access can be granted to the system.

Sections marked with an asterisk (*) are required.

Enable 2-Step Verification

If you wish to enable this feature for only a subset of users, then you may do so by selecting the User Categories that require 2-Step Verification below. **Note:** Once a User Category is selected then the feature is no longer enabled for all users. It will only apply to the users of the selected Category(s).

Select the User Categories that require 2-Step Verification

Select/Deselect All

EMPLOYEE

EXTERNAL

EXTERNAL_CANDIDATE

INTERNAL_CANDIDATE

INTERNAL_NEW_HIRES

MANAGER

NEW_HIRES

Set Passcode Expiration*

Passcode Expiration:

60 Minutes

Submit Cancel

Figure 91. Configure 2-Step Verification page

In the **Select the User Categories that require 2-Step Verification** section,

2. Select the User Categories that require 2-Step Verification.

Note: This section is optional. Enable this feature when only a subset of users is required. Once a User Category is selected, the feature is no longer enabled for all users. It will only apply to the users of the selected Category(s).

In the **Set Passcode Expiration*** section,

3. Set the passcode expiration in minutes in the **Passcode Expiration** field.
4. Select **Submit** to save your configuration or **Cancel** to exit without saving.

Chapter 7. Talent Management Solutions Clock Synchronization

The clocks in the Talent Management Solution systems are synchronized using the following Network Time Protocol (NTP) servers:

- US Domains: (2x.kenena.com and 2x-staging.kenexa.com): time.nist.gov
- EU Domains: (2x-dc2.kenena.com and 2x-dc2-staging.kenexa.com): ie.pool.ntp.org

Network Time Protocol (NTP) is an Internet protocol used to synchronize the clocks of computers to some time reference. This is very important for monitoring computer network activities.

Clock synchronization

There are several problems that occur as a result of clock rate differences. Clock synchronization coordinates otherwise independent clocks. Even when initially set accurately, real clocks will differ after some amount of time due to clock drift, caused by clocks counting time at slightly different rates.

Network Time Protocol

The Network Time Protocol (NTP) is a networking protocol for clock synchronization between computer systems over packet-switched, variable-latency data networks.

NTP is intended to synchronize all participating computers to within a few milliseconds of Coordinated Universal Time (UTC). It uses the intersection algorithm to select accurate time servers and is designed to mitigate the effects of variable network latency. NTP can usually maintain time to within tens of milliseconds over the public Internet, and can achieve better than one millisecond accuracy in local area networks under ideal conditions. Asymmetric routes and network congestion can cause errors of 100 ms or more.

Chapter 8. Admin Help

The Help menu option is provided to allow the user to navigate to the IBM Kenexa Talent Suite Admin Application Guide in the IBM Talent Management Solutions knowledge Center.

About this task

The IBM Smarter Workforce Knowledge Center is currently accessed via the **Admin Help** link on the expanded Admin navigation menu for the Admin application.

Procedure

1. Expand the Admin navigation menu for the Admin application.
2. Select the **Admin Help** menu link. (This opens the IBM Kenexa Talent Suite Admin Application Guide in the IBM Talent Management Solutions Knowledge Center.)

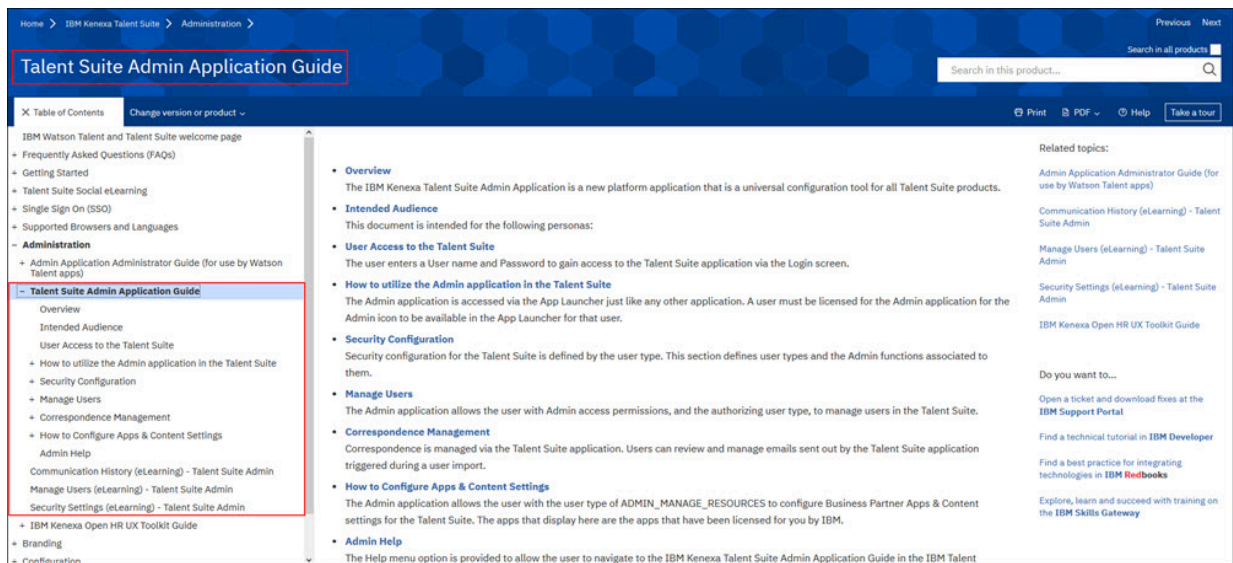


Figure 92. Talent Suite Admin Application Guide page in the IBM Talent Management Solutions Knowledge Center

Once the IBM Talent Management Solutions Knowledge Center has been launched, the user can access the various chapters and sections of the IBM Kenexa Talent Suite Admin Application Guide via the links provided on the User Guide's main page and the **Table of Contents** menu panel.

If desired, the user can navigate to other SWF products for which they are enabled via the **Back to all products** link in the Table of Contents menu.

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