343 Winter Street
Waltham, MA 02451
United States
Tel: 781.530.5000

Kenexa 2X BrassRing™

Kenexa 2x BrassRing

Product Update Guide

R12.3

Release Date: 22 April 2010
Document Date: 04 June 2010

When you multiply the right individual by the right environment, success is inevitable.

iXe=S

About Kenexa

Kenexa is a leader in building the world's greatest workforces. Using the unique combination of software, science and business process optimization, Kenexa helps organizations hire and retain a more productive workforce. We take great pride in being the only company in the world to offer these combined services, which ultimately link human resource processes to business outcomes.

We believe that no matter who they are, or what part of the world they live in, people define themselves by the work they do. When people are in jobs they love, and are in environments that maximize their potential, they are not only more productive employees, they are better parents, friends, partners and neighbors. It's the core of our mission, our passion and our purpose—globally serving humanity, everyday.

Kenexa
Corporate Headquarters
650 East Swedesford Road
2nd Floor
Wayne, PA 19087
Tel: 877-971-9171
Fax: 610-971-9181

Agency Manager Enhancements

With this release, customers can implement a data privacy policy for candidates making submissions through Agency Managers. (**Note:** There is already a data privacy workflow for Agency contacts.) The data privacy policy can be presented alone (the default workflow) or followed by a question.

Feature Summary Grid

Date Available	US: 17/DEC/2010 EU: 23/DEC/2010
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☐ Workbench Self-Service ☐ 2x BrassRing New UI ☑ 2x BrassRing ☐ Talent Gateways ☑ Agency Manager ☐ Data Insight Tool ☐ 2x SmartApproval ☐ 2x Onboard
Visible Changes	☑ No – contact your CSC for implementation details. ☐ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☐ Specific conditions required – see details below. ☑ Configuration required – contact your CSC for details.

Benefits

Customers can institute a data privacy policy for candidates completing applications to jobs through Agency Managers. With this enhancement, all types of gateways (Talent, Employee Referral, and Agency Manager) support a data privacy option for the candidate workflow.

Feature Description

Note: The session time-out feature affects all data privacy pages.

With this release, customers can implement a data privacy policy for candidates making submissions through Agency Managers. The data privacy policy can be presented alone (the default implementation) or followed by a question. Agency Managers and candidates receive notifications and complete steps on Agency Manager application pages related to the specific workflow.

When the data privacy policy for candidates is enabled, candidates must accept a data privacy policy statement before submitting resumes, applications, and other information to 2x BrassRing through an Agency Manager gateway. If candidates decline the data privacy policy, the job submission workflow is terminated and any candidate data is purged from the system.

Alternatively, candidates can choose to bypass the data privacy policy to continue with a job submission. The system interprets bypassing the data privacy policy as consenting to it.

If the data privacy policy with a question is enabled for candidates, candidates must accept the data privacy policy statement AND answer the question in the desired manner before continuing with the submission. For example, your organization might want to ask a question such as, “Are you legally eligible to work in the United States?” before letting the candidate start the application workflow.

Note: Agents may have to consent to a privacy policy themselves before entering candidate data; this is existing functionality and its behavior has not changed.

Your Kenexa consultant can configure eLink e-mail subject lines, e-mail messages, privacy policy statements, and questions (if applicable) that are displayed in the course of each type of workflow.

In addition, the candidate submission workflow through Agency Managers includes a link to the Job details page, providing a means for candidates to see information about the job to which they have been invited to apply.

Additional Pages in the TG Workflow

Candidates who complete the job application successfully see two or three new pages (depending on whether your company includes the question or not) in the data privacy workflow:

Job Details Page – In the e-mail sent inviting them to apply to the job, Candidates can click an encrypted link to launch the new **Job details** page.

Data Privacy Page – In the e-mail sent to them inviting them to apply to the job, Candidates can click an encrypted link to view the **Data privacy policy** page. If the candidate has already viewed and accepted the privacy policy, the following message is displayed: “You have already submitted your responses. Thank you.”

Data Privacy Question Page – This page displays the privacy question when the customer is configured for data privacy with a question.

This page shows Question text configured in Workbench along with a button with two (2) options:

- The 1st option displays the text of Answer 1. If the candidate selects the first option, the workflow continues as a regular submission.
- The 2nd option displays the text of Answer 2. If the candidate selects the 2nd option, the system displays the Privacy policy text (either the default text or the customized text, configurable in Workbench).

The **Job details** page, error message page, and all data privacy-related pages are displayed in plain text with no branding.

eLink Expiration

eLinks expire if the candidate waits more than 180 days before clicking one of the data privacy eLinks in the e-mail.

The system sends the "expired eLink" e-mail to the Agency contact and displays the following error message to the candidate: "The link you have come to has expired and this page is no longer accessible for security reasons".

Candidate Submitted Job Application Already

If the candidate has already submitted the data and once again clicks the link, the following error message displays: "You have already submitted your responses. Thank you."

Candidate's Workflow with Data Privacy Enabled

The workflows described in this section are:

- Data privacy policy acceptance workflow with **Privacy policy placement: Referred candidate eLink data privacy required** selected
- Data privacy policy acceptance workflow with **Privacy policy placement: Referred candidate eLink data privacy with question** selected
- Data privacy policy decline workflow

Data Privacy Workflow (Default – No Question)

When the data privacy policy is turned on, the following workflows are possible:

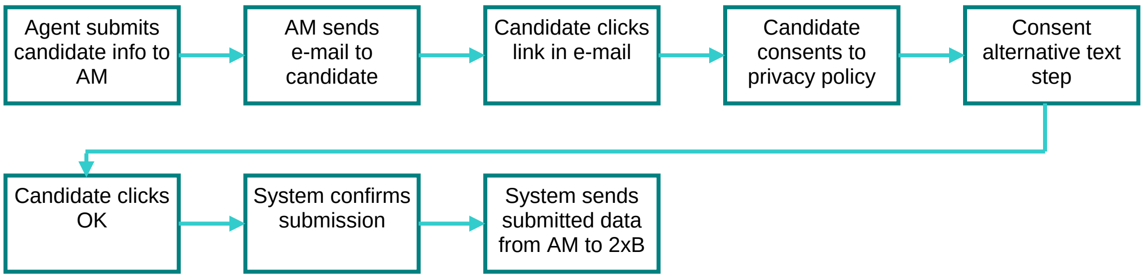
- The privacy policy is always the first step of the candidate's application flow.
- The candidate can choose to view the privacy policy and accept it:
  - Display privacy policy → Consent to privacy policy → Continue submission workflow → Submit application
- The candidate can choose to display the privacy policy and reject it:
  - Display privacy policy → Decline privacy policy → Terminate submission workflow
- The candidate can choose to bypass the privacy policy and continue with the submission workflow:
  - Bypass privacy policy → Continue submission workflow → Submit application

If the candidate does not respond to the e-mail until 180 days have passed (for example, the candidate opens the e-mail and clicks either of the links—**Display privacy policy** or **Bypass privacy policy**—link 7 months after receiving it), the links have already expired. The system informs the candidate that the link has expired.

If the candidate clicks either of the links more than the number of times specified in the client setting for number of eLink clicks permitted, the system informs the candidate that the link has expired.

Candidate Accepts Data Privacy Policy (No Question)

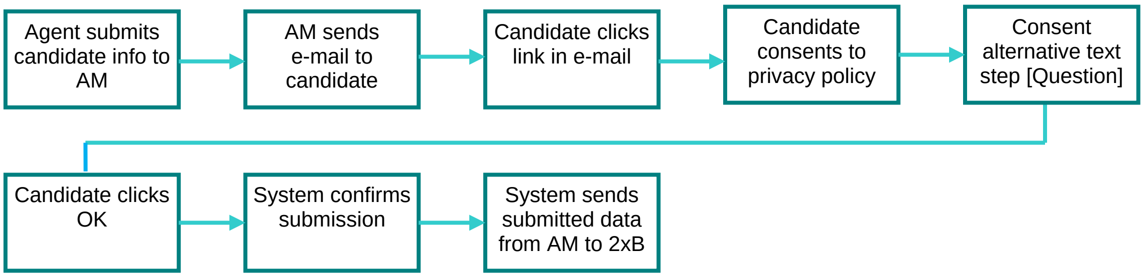
- **Main tab – Agency submission setting: Data privacy** is selected.
- **Privacy policy tab – Privacy policy placement: Referred candidate elink data privacy required** is selected. This is the default setting for privacy policy placement.



1. The agent submits the candidate information to the Agency Manager.
2. The Agency Manager sends an e-mail to the candidate.
3. The e-mail contains a **Please click here to proceed** link. This is a link to the data privacy policy statement. The candidate clicks the link at the bottom of the e-mail message.
4. The configured **Privacy policy header text** and text and **Privacy policy** text are displayed.
5. The candidate reads the privacy policy and clicks the **Agree** button.
6. The **Consent alternative text** is displayed on the same page with an **OK** button.
7. The candidate clicks the **OK** button.
8. The system displays the message “Thank you for your submission,” or the customized message configured in its place.
9. When the candidate clicks **Submit** (thereby completing the submission on the Agency Manager side), the submitted data is sent to 2x BrassRing and is no longer held on the **Agency Manager** side.

Candidate Accepts Data Privacy Policy (with Question)

- **Main tab – Agency submission setting: Data privacy** is selected.
- **Privacy policty tab – Privacy policy placement: Referred candidate elink data privacy with question** is selected.
- **Privacy policy tab –** Configured question **Policy answer 1: (Bypass Policy)**



1. The agent submits the candidate information to the Agency Manager.
2. The Agency Manager sends an e-mail to the candidate. This is a link to the data privacy policy statement.
3. The candidate opens the e-mail and clicks the **Please click here to proceed** link at the bottom of the e-mail message.
4. The **Privacy policy header text** and text and configured **Privacy policy** text are displayed. The candidate consents to the privacy policy.
5. The candidate reads the privacy policy and clicks the **Agree** button.
6. The question (**Consent alternative text**) is displayed on the same page with an **OK** button.
7. The candidate clicks the **OK** button.
8. The system displays the message “Thank you for your submission,” or the customized message configured in its place.
9. When the candidate clicks **Submit** (thereby completing the submission on the Agency Manager side), the submitted data is sent to KRB and is no longer held on the **Agency Manager** side.

Candidate Selects “Bypass policy”:

If the candidate selects the configured question **Policy answer 1: (Bypass Policy)**, the Privacy policy statement does not display and the candidate can continue on with the submission.

The candidate clicks the **OK** button and the configured message displays to the candidate “Thank you for your submission.”

When the candidate clicks **Submit,** the agency submission is sent to 2x BrassRing from the Agency Manager and is no longer stored on the Agency Manager side.

Candidate Selects "Display policy"

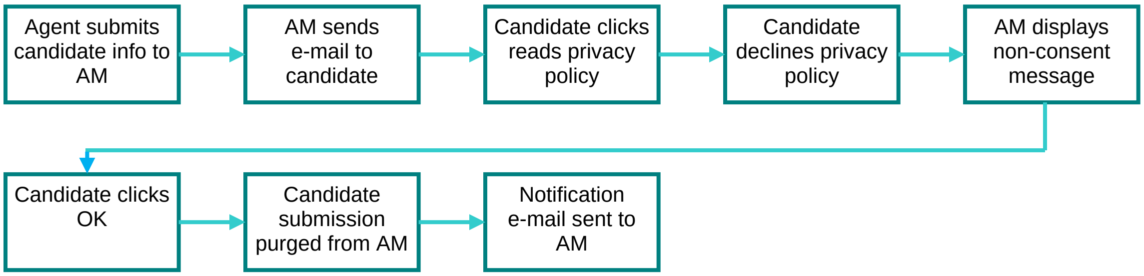
If the candidate selects the configured question **Policy answer 2: (Display policy)**, then the Privacy policy statement displays.

The candidate clicks the **Agree** button, the Consent alternative text message displays on the same page with the **OK** button.

The candidate clicks the **OK** button and a configured message displays to the candidate "Thank you for your submission."

Candidate Declines Data Privacy Policy (with or without question)

- **Main tab – Agency submission setting: Data privacy** is selected.
- **Privacy policty tab – Privacy policy placement: Referred candidate elink data privacy required** OR **Privacy policy placement: Referred candidate eLink data privacy with question** is selected.



1. The agent submits the candidate information to the Agency Manager.
2. The Agency Manager sends an e-mail to the candidate. The e-mail contains a **Please click here to proceed** link. This is a link to the data privacy policy statement.
3. The candidate clicks the link at the bottom of the e-mail message.
4. The configured **Privacy policy header text** and text and **Privacy policy** text are displayed.
5. The candidate reads the privacy policy and clicks the **Disagree** button.
6. The **Non-consent alternative text** message is displayed on the same page with an **OK** button.
7. The candidate clicks the **OK** button. The window closes.
8. The submission for that candidate is purged from Agency Manager.
9. The Agency Manager sends an e-mail notification to the Agency contact informing him or her of the decline action. The email contains the e-mail subject line and e-mail body text as configured on the **eLink** tab in Workbench.

Data Privacy Expired Flow

The eLink within the e-mail inviting the candidate to apply to the job expires after 180 days under the following conditions:

The candidate clicks on the eLink that opens the e-mail, but never clicks on the “here” in the eLink that states “Please click here to proceed.”

After 180 days have passed), when the candidate attempts to click on the “here” in the “Please click here to proceed” link, the following message displays: “The link which you are trying to access is no longer valid”.

Incomplete Submissions/Expired Submissions

If the Agency submission is set to **Data privacy**, incomplete submissions are held on the Agency Manager side in the status of **Submission in progress** for up to 180 days. Candidates that are in **Submission in progress** status are candidates that have yet to accept or decline the privacy policy statement and if they were sent prior to 180 days to the date of submission.

After 180 days, the agency submission is purged and the “Expired submission e-mail message” is sent to the Agency Contact. This causes the candidate eLink to expires as well.

The notifications about expired status are sent in a nightly process and not in real time.

Agency Manager Submissions

If Agency submission is set to **Standard,** the candidate is submitted to 2x BrassRing immediately (and not held on the Agency Manager), and the e-mail eLink to the candidate does not expire.

Submissions in progress – Candidates with an asterisk (*) have a privacy policy in “Pending Approval” status.

Rejection submission – A submission has the “Rejected” status when the candidate declines the privacy policy statement, or if the candidate never clicks the “Please click here to proceed” eLink in the e-mail. The asterisk (*) for candidates in the **Rejected** status indicates that the candidate declined privacy policy, or that the eLink has expired.

Expired eLinks – The eLink expires after 180 days. If candidates click the eLink once it has expired , either the configured or default error message (“The link which you are trying to access is no longer valid”) displays.

How Do Clients get this Feature?

Your Kenexa consultant must configure the settings for one or more Agency Managers. Contact your Kenexa consultant for help with this feature.

Agency Manager – Hold Candidate Submission

Your organization can elect to block candidates from submission to Kenexa 2x BrassRing until they have responded to the Agency's request for information. Specifically, you can configure an Agency Manager to hold a candidate's submission on the Agency Manager side and not submit the application to 2x BrassRing until the candidate has completed forms and/or questions. This feature works for both standard submissions and data privacy-enabled submissions.

The requested job-specific information is captured on two different forms. They are:

- Candidate Response Form (CandResponseForm.aspx) – This page displays the job-specific questions (based on Job ID) for the requisition.
- Candidate Attachment Form (CandAttachForm.aspx) – This page displays when additional forms are attached to the job requisition.

After answering the question(s) and/or filling out the form(s), when the candidate clicks Submit, the information is sent to 2x BrassRing.

Date Available	US: 18/Feb /2010 EU: 24/Feb/2010
Product	☑ Workbench ☐ Workbench Self-Service ☑ 2x BrassRing - New UI ☑ 2x BrassRing - Classic ☐ Talent Gateways ☑ Agency Manager ☐ Data Insight Tool ☐ SmartApproval
Visible Changes	☑ No – contact your CSC for implementation details. ☐ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☐ Specific conditions required – see details below. ☑ Configuration required – contact your CSC for more information.

Benefits

This capability can ensure that only those candidates who have completed the forms and/or questions are filed to the requisition for consideration.

Feature Description

When the new Agency Manager setting is enabled, the various workflows depend on the following variables:

- Workbench settings:
  - Is the standard submission process in place (this is the default), or is **Data Privacy** enabled?

- What is your organization's configured setting for number of clicks allowed before an eLink expires [**ElinkExpirationClicks (1-99)**]?
- What is your organization's configured setting for the number of days to display rejected candidates [**# Days display "rejected" candidates**] on the **Agency Manager > General** tab in Workbench?

- Has the candidate completed the questions and/or forms and submitted the responses within the 180 day period?
- How many days have elapsed since the eLink e-mail was sent to the candidate?
- Stacking issues:
  - Is the candidate submitting a duplicate application?
  - Is the candidate's submission failing to stack properly for some reason?

Standard Submission Workflow

When the Agency submission method is standard, once the candidate submits the application, it is sent to 2x BrassRing whether it is complete or not.

If the **Hold candidate submission …** setting is enabled, and candidate has not answered the question(s) and/or filled out the form(s), the Agency Manager sends the "Action required" e-mail to the candidate. It contains an eLink to the question(s) or form(s).

If the candidate clicks the eLink, answers the questions/completes the forms, and clicks Submit, the candidate data is submitted to 2x BrassRing.

If the candidate clicks the eLink but does not complete the questions or forms, the candidate is held on the Agency Manager until he or she completes and submits the questions or forms OR until the eLink expires due to clicking the eLink too many times or 180 days passing.

If the candidate never clicks the eLink, it expires at 180 days.

The candidate is deleted from the Agency Manager at 180 days if the candidate took no action at all (that is, never clicked the eLink) or if the candidate failed to complete the questions or forms.

Data Privacy Submission Workflow

If Agency submission is set to **Data Privacy** and **Hold candidate submission …** is enabled, the system sends an e-mail sent to the candidate with an eLink to the privacy policy pages.

If candidate agrees to or bypasses the privacy policy, the Agency Manager sends the "Action required" e-mail to the candidate. It contains the eLink to the question(s) and/or form(s).

If the candidate clicks the eLink, answers the questions/completes the forms, and clicks **Submit**, the candidate data is submitted to 2x BrassRing.

If the candidate clicks the eLink but does not complete the questions or forms, the candidate is held on the Agency Manager until he or she completes and submits the questions or forms OR until the eLink expires due to clicking the eLink too many times or 180 days passing.

If the candidate never clicks the eLink, it expires at 180 days.

The candidate is deleted from the Agency Manager at 180 days if the candidate took no action at all (that is, never clicked the eLink) or if the candidate failed to complete the questions or forms.

Declining the Privacy Policy

If Data Privacy is enabled and the candidate declines the policy, the candidate is listed on the **Rejected submissions** tab for the number of days configured in the following setting: **# Days display "rejected" candidates**] on the **Agency Manager > General** tab, and then deleted from the Agency Manager.

Submitting the Data a Second Time

If the candidate has already submitted the data and he or she clicks the e-mail eLink a second time, the following message displays: "You have already submitted your responses. Thank you." **Note:** This is existing behavior – it is not new with this feature.

General Business Rules

Note: The successful submission assumes that the candidate accepted or bypassed the privacy policy if Data Privacy is enabled. If the Agency submission is set to **Data Privacy**, the system sends the "data privacy" e-mail with the links to the privacy policy pages as the first step in the workflow.

When the **Hold submission until candidate response on file** setting is set to **No**, the candidate is filed to the requisition in 2x BrassRing upon submitting their data, regardless of whether forms are filled out and/or questions are answered.

When the **Hold submission until candidate response on file** setting is set to **Yes**, the system checks that the candidate has submitted forms and/or questions associated with the requisition to which he or she is applying. If the candidate response is not yet on file, the candidate is held on the Agency Manager side for a maximum of 180 days. "Held" candidates are listed on the **Submission in Progress** tab in the Agency Manager until they submit the appropriate response OR until the eLink expires (according to the **ElinkExpirationClicks (1-99)** setting, described below). See further down for more information about candidates on the **Submissions in progress** tab.

If the Agency is part of a Global Agency Manager, the "**Hold submission…**" setting is configured at the member level.

The system displays the "elink expired" message to the candidate if he or she clicks the link for questions and it has already expired in accordance with the configured client setting **ElinkExpirationClicks (1-99)**.

The system purges candidates after 180 days if they have not submitted the questions and/or forms. The purge works similarly to the privacy policy purge for candidates who decline the privacy policy. The system sends the **Expired Submission eLink message** to the Agency Contact who submitted the candidate.

This functionality can be turned off after being enabled. If customers turn it off:

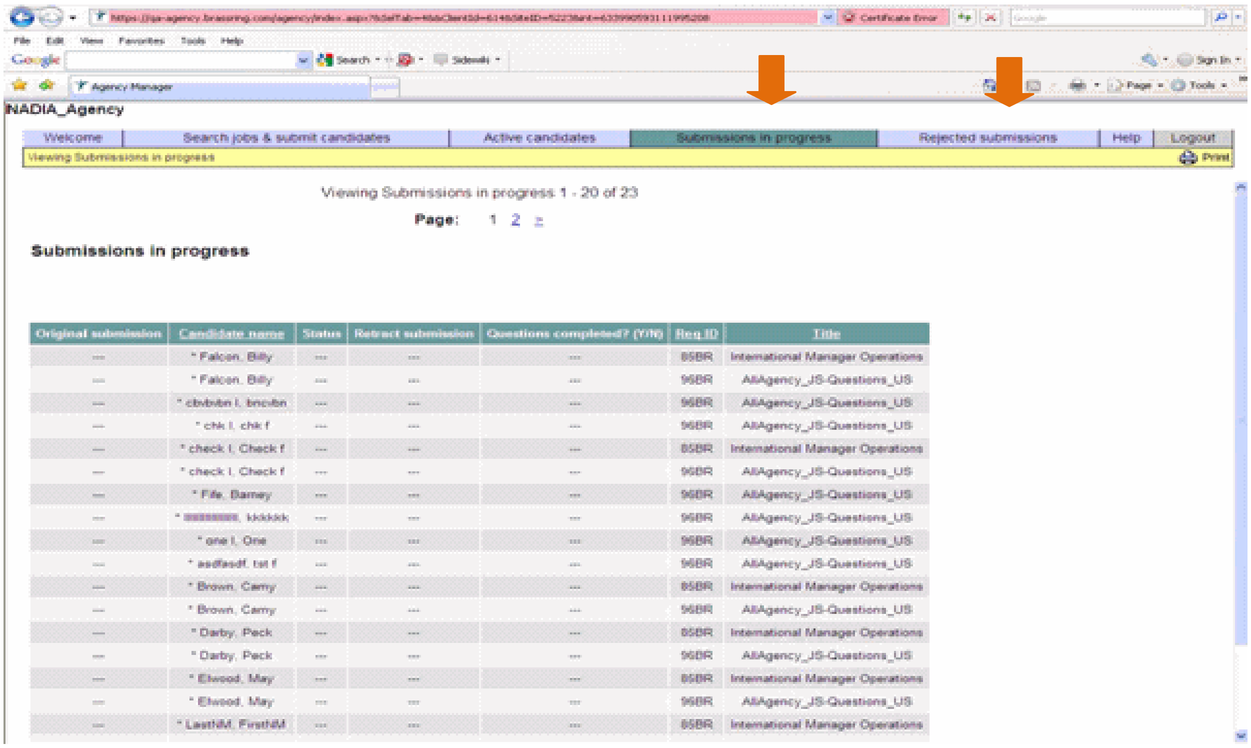
- New candidates applying after the **Hold submission …** setting is changed back to **No** are moved directly into 2x BrassRing (unless Data Privacy is enabled, in which case candidates go through the data privacy workflow).
- Candidates who were being held on the Agency Manager before the setting was changed back to **No** because they have not submitted questions and/or forms remain held on the Agency Manager.*

***Important:** If your organization needs the "held" candidates to be submitted to 2x BrassRing, you must open a maintenance ticket requesting that the candidates be submitted.

Candidates on the Submissions in Progress Tab

The candidate is listed on the **Submissions in progress** tab:

- When **Hold submission...** setting is on, and the job has forms or questions attached.
- Once the candidate has submitted the answers to the forms and questions, he or she is listed on the **Active canididates** tab.



Candidates on the Rejected Submissions Tab

Candidates are listed on the **Rejected submission** tab:

- If a candidate is either duplicate/stacked or there is some other error with that candidate (for example, the candidate fails to stack correctly).
- When the candidate declines the privacy policy, the candidate is listed for the number of days defined by the setting **# Days display "rejected" candidates**.

Deletion of Candidate from Agency Manager

If the candidate declines the privacy policy, he or she is held on the Rejected submissions tab for the number of days defined by the setting **# Days display "rejected" candidates**.

The candidate is held on the Agency Manager side for 180 days if the candidate has not submitted the response to the forms and/or questions. Once 180 days passes, the candidate is deleted completely from the Agency Manager side.

Workflows: Data Privacy Not Enabled

Scenario 1: Candidate Submits Application Successfully

1. The candidate clicks the eLink within the “action required” e-mail.
2. The candidate completes the application, answers the job-specific questions, and submits the data.
3. The candidate data is passed to Kenexa 2x BrassRing and filed to the requistion to which he or she applied.

Scenario 2: Candidate does not Complete Questions

1. The candidate clicks the eLink within the “action required” e-mail.
2. The candidate completes the application, does not answer the job-specific questions, and trys to submit the data.
3. The candidate sees an error message.
4. The candidate’s submission is held on the Agency Manager and listed on the **Submission in progress** tab for up to 180 days.
    - If the candidate does not complete the job-specific questions, he or she is deleted from the Agency Manager side when 180 days have passed.
    - If the candidate completes the job-specific questions at some point within the 180 day period and submits the application, the candidate’s data is processed as described in Scenario 1 above.

Workflows: Data Privacy Enabled

In the next several scenarios, Data privacy is enabled.

Scenario 3: Candidate Submits Application Successfully

1. The candidate clicks the eLink within the “action required” e-mail.
2. The privacy policy is presented.
3. The candidate consents to or bypasses the privacy policy.
4. The candidate answers the job-specific questions and/or completes the forms, and submits the data.
5. The candidate data is passed to Kenexa 2x BrassRing and filed to the requistion to which he or she applied.

Scenario 4: Candidate does not Consent to the Privacy Policy

1. The candidate clicks the eLink within the e-mail.
2. The privacy policy is presented.
3. The candidate does not consent to the privacy policy.

4. The candidate is listed on the **Rejected submissions** tab for the number of days defined by the setting **# Days display "rejected" candidates**.
5. The candidate is then deleted from the Agency Manager.

Data Privacy Enabled or Not Enabled

Scenario 5: eLink Expires

The e-mail eLink contained in the e-mail the candidate receives inviting him or her to apply to the job can expire for two reasons:

- The candidate clicks the eLink the maximum number of times allowed according to the Workbench setting **ElinkExpirationClicks (1-99)**.

  OR

- the candidate fails to click the eLink at all and the 180 days pass.

When the eLink has expired, the following message displays: "*The link you have come to has expired and this page is no longer accessible for security reasons*".

How Do Clients Get this Feature?

Please contact your CSC for help with this feature.

Agency Manager: Referral Rights by Requisition

Agency Manager has a new option that provides flexibility and cost savings for clients with agency agreements that limit candidate referral rights to only those requisitions for which the agency has referred the candidate. When **Resume/CV referral rights by req** is set to **Yes**, if candidates are considered for and hired into requisitions for which the agency had not referred them, no payment to the agency for the candidate placement is necessary.

Date Available	US: 22/APR/10 EU: 28/APR/10
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☑ Workbench Self-Service ☑ New UI ☑ 2x BrassRing ☐ Talent Gateways ☑ Agency Manager ☑ Data Insight Tool ☐ SmartApproval
Visible Changes	☐ No – contact your CSC for implementation details. ☑ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☑ Specific conditions required – see details below. ☐ Configuration required – see details below.

Benefits

Clients can save referral fees if their agency agreements limit candidate referral rights only to requisitions for which the agency has referred the candidate.

Feature Description

For clients with Agency Manager enabled, the **Resume/CV referral rights by req** option provides flexibility and cost savings for clients with agency agreements that limit candidate referral rights to only those requisitions for which the agency has referred the candidate. If the candidate is being considered for and hired into a requisition for which the agency had not referred the candidate, a payment to the agency for the candidate placement is not necessary.

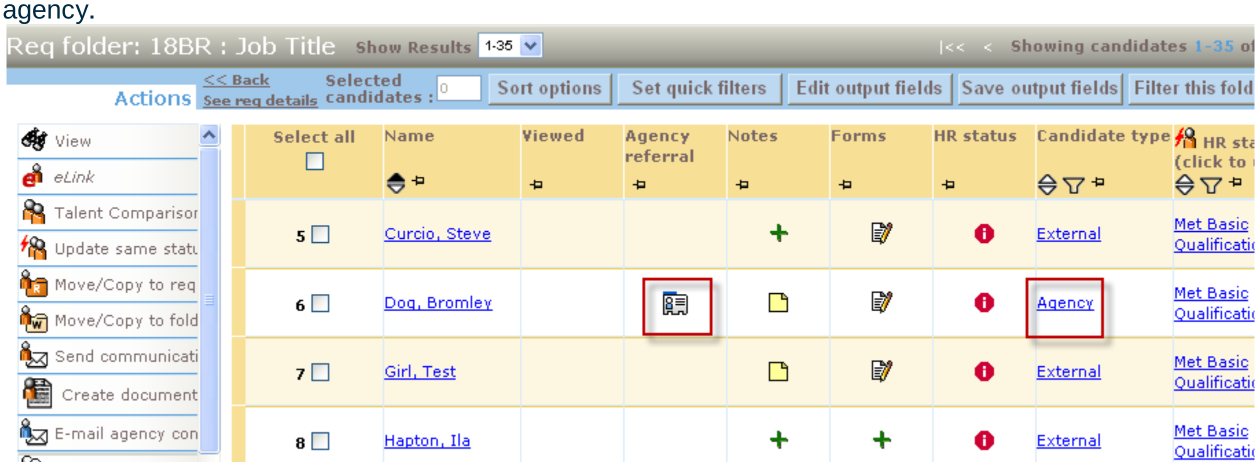
2xB administrators set the option when administering the Agency code list. The field appears on the **Add code, Edit code**, and **View code details** pages.

When **Resume/CV referral rights by req** is set to **Yes**, Agency Manager manages referral rights on a per-requisition basis in 2xB. When agencies have per-req referral rights, multiple agencies can “own” a candidate for different reqs. The Agency Tab of candidates’ Talent Records shows each “ownership” in its own row, and includes the Req ID, on both Current agency and Agency history tabs.

When the option is set to **No**, Agency Manager records and manages when an agency has referral rights to a candidate irrespective of requisition. If the agency currently holds referral rights to a candidate, those rights extend across all requisitions. The default setting is **No** for existing Agency codes.

Agency Referrals in 2xB Req Folders

In Req folders, 2xB users see a referral icon indicating candidates who are successfully referred by an agency.



- The icon displays both if the candidate is "owned" by an agency only for the specific req, as well as if the candidate is "owned" by an agency in general. When the candidate has not been referred, either for the req or in general, no icon displays. Thus the icon in the Agency referral column indicates a potential fee associated with hiring this candidate for this req.
- If an Agency with Resume/CV referral rights by req = Yes for its Agency code successfully submits a candidate to 2xB, the candidate's Candidate type does not change to **Agency**, but remains the current candidate type.

The following are sample process flows for "per req" (setting is Yes) and "per candidate" (setting is No) agency contracts.

- Agency A ("per req" contract) submits Tom Jones to Req 10BR
  Candidate not currently in system, **submission allowed**
  Candidate type = External
- Agency B ("per req" contract) submits Tom Jones to Req 12BR
  Candidate currently in system, but not currently "owned" in 12BR, **submission allowed**
  Candidate type = External

- Agency C (“per candidate” contract) submits Tom Jones to Req 15BR
  Candidate currently in system, but not currently “owned” in 15BR**, submission allowed**
  Tom Jones’ Candidate type switches to Agency
  Agency C “owns” candidate for all reqs except 10BR & 12BR
  No other agency will be able to submit this candidate until Agency C ownership expires.
- Agency D (“per req” contract) submits Tom Jones to Req 20BR
  Candidate currently in system and “owned” for one req by Agencies A and B, and for all other reqs by C. Agency C ownership “by candidate” causes **submission rejected**

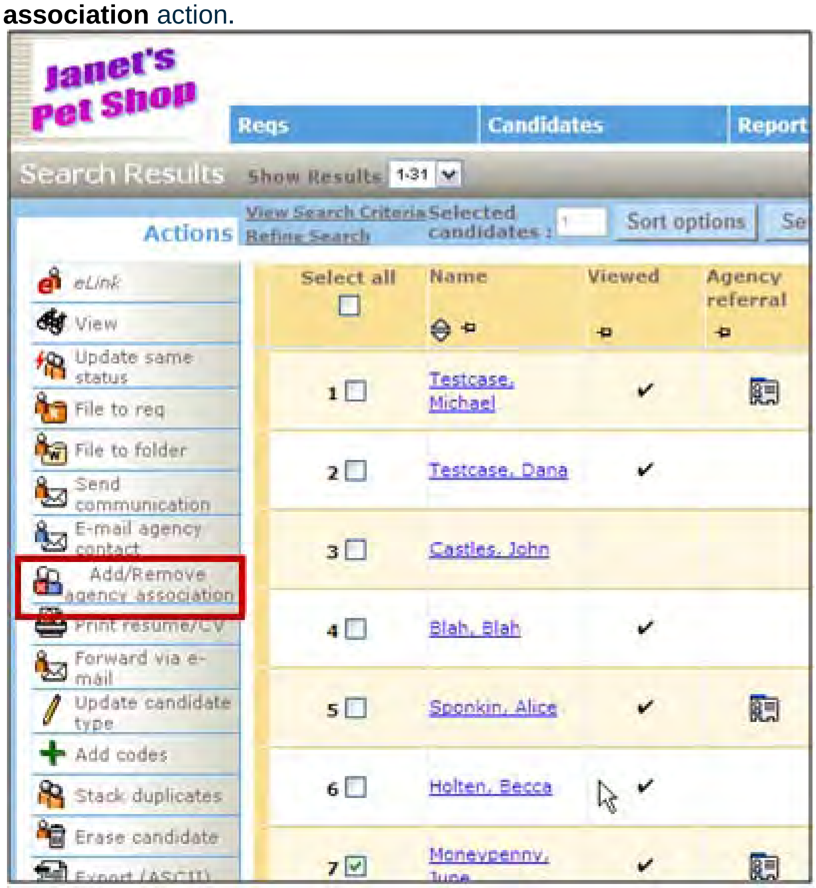
Agency Manager would show Tom Jones under **Active submissions** for Req 10BR and 12BR, under **Rejected submissions** for 20BR, and under **Submissions in progress** for 15BR.

Adding or Removing Agency Association for Candidates

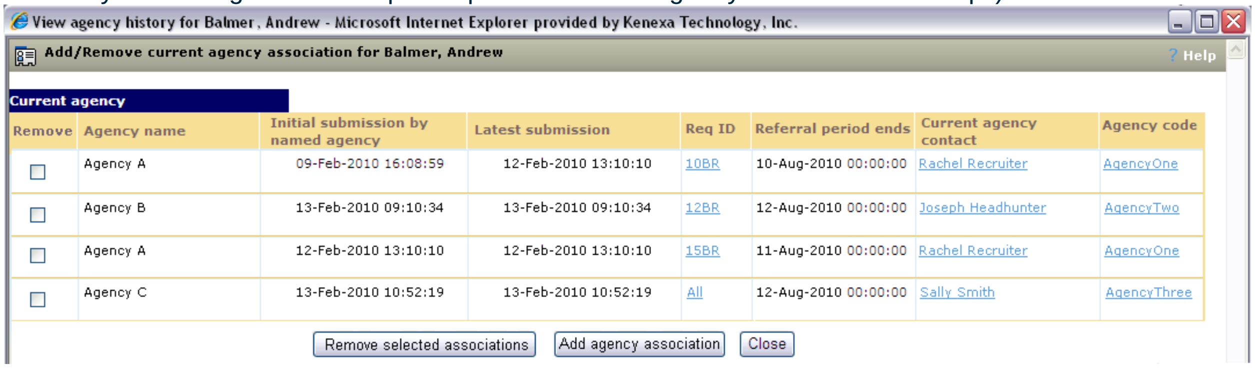
Users can remove or add agency association for a candidate, without removing them from the req folder. They must have appropriate privileges – **Candidates - Remove current agency association** and/or **Candidates - Add current agency association privileges**.

To remove an agency association:

1. On a Req folder or candidate grid, select *one* candidate and click the **Add/Remove agency association** action.



The Add/Remove current agency association screen pops up. (Sample candidate shown here is owned by several agencies on a per-req basis and one agency across all other reqs.)

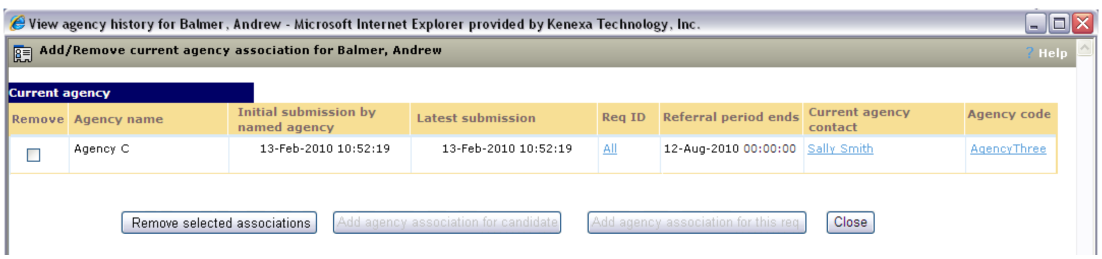


2. Check the boxes beside the agencies whose referral association you are removing.
3. Click Remove selected association.
4. Click Continue on the confirmation page. The candidate's current record of agency association will be moved to the Agency history section of the candidate's Talent Record.

   (Previously, agency association was removed in 2xB by selecting one or more candidates and clicking the Remove agency association action from a candidate grid.)

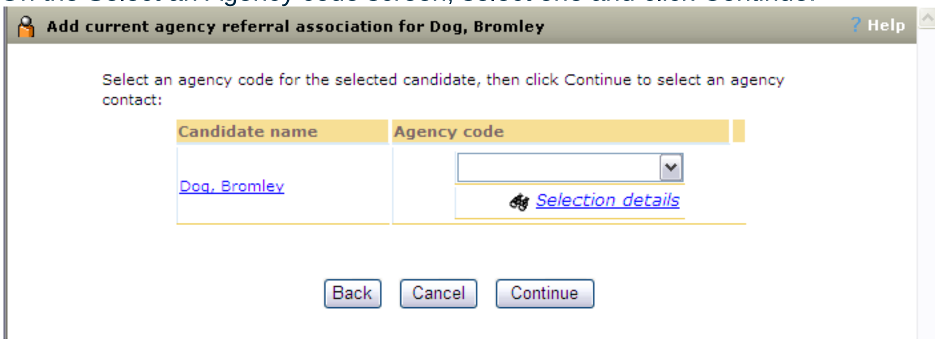
To add an agency association:

Note: When a candidate is owned by one agency across all reqs (as shown here), you cannot add another agency association until you have removed the current association.



1. On a Req folder or candidate grid, select *one* candidate and click the **Add/Remove agency association** action. The Add/Remove current agency association screen pops up.
2. Check the box(es) beside the agencies whose referral association you are adding.
3. To add an association for a candidate:
   Click **Add agency association for candidate**. (This action is only available when the candidate is currently owned by an agency for which referral rights are “by req” – that is, Admin+ Agency code setting for Resume/CV referral rights by req = Yes.)
   –OR–
   To add a per-req association for a candidate for this req, click **Add agency association for this req**. (This action is only available when the action is taken from within a Req folder and the candidate is not currently owned by an agency with general – rather than per-req – referral rights.)

4. On the Select an Agency code screen, select one and click Continue.



5. On the Select an Agency contact screen, select one and click Save.

If the Agency code chosen does not have per-req referral rights, the candidate type is changed to Agency and the Current agency table in the candidate's Talent Record is updated with the new selection.
If the Agency code chosen does have per-req referral rights, the candidate type does not change and the Current agency table in the candidate's Talent Record is updated with the new selection.

(Previously, agency association was updated in 2xB using Update Candidate type and selecting the value Agency, then selecting the appropriate Agency code and contact. When using the Update Candidate type action in 2xB, Agency is no longer a value available for users to select.)

2xB Remove from folder Candidate Action

The **Remove from folder** action takes into account an Agency's per-req "ownership" of candidates when you remove candidates from a folder:

If the action is taken on a candidate in a req for which an agency has per-req referral rights:

- Candidate is removed from the Req folder
- Agency ownership for that candidate for that req expires and the row is moved from Current agency to the Agency history in the Talent Record
- Candidate no longer appears in the agency's Active submissions tab on Agency Manager.

Retracting a Submission

When an Agency requests to retract a candidate submission for a requisition, a message is sent to the configured individual(s) to remove the candidate from the req folder.

An appropriately privileged 2xB user must then manually remove the candidate from the Req folder. This action expires the Agency ownership rights for the candidate for that req for agencies with per-req referral rights. In addition:

- Candidate is removed from the agency's Active submissions tab on Agency Manager for that requisition (i.e., that row disappears).
- If the agency owns the candidate for any other req, the candidate remains on the agency's Active submissions tab on Agency Manager for those other requisitions.

If the agency has **Resume/CV referral rights by req** = **No**:

- Candidate remains on the agency's Active submissions tab on Agency Manager, but the **Status** column contains dashes (---) only.

Removing a Candidate from Agency Manager

A candidate should only appear in Agency Manager for an agency when the agency is listed as a "Current Agency" for the candidate. If a current agency has **Resume/CV referral rights by req** = **Yes** and the candidate is removed from the Req folder (and the agency does not currently own the candidate for any other req), then the candidate is removed from the Agency Manager as well (since the agency no longer technically owns the candidate and should not have access to change the candidate information).

Expiring Agency ownership rights for Per-Req ownership

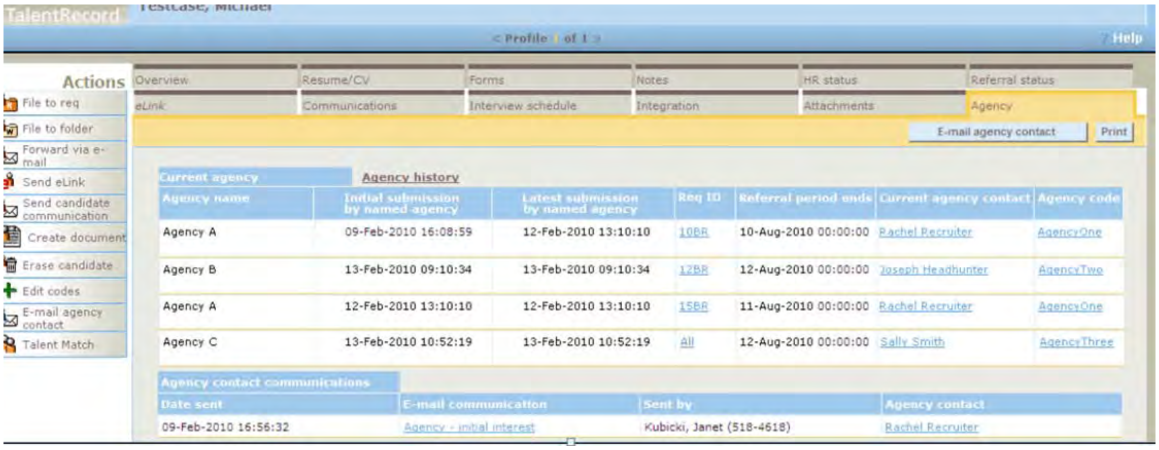
When an agency owns the candidate by requisition, rights for that candidate expire when one of the following conditions are met:

- Ownership rights for the agency expire naturally (the number of days entered in the Agency Code "Resume/CV referral rights period for the following number of calendar days" has been exceeded) and the candidate is in a Final HR status.
- Candidate is removed from the Req folder manually via "Remove from folder" action in 2xB.
- Agency association is removed manually via "Remove agency association"' action in 2xB.

If the ownership rights for the agency expire naturally *and* the candidate remains in a Start or Intermediate HR status, the ownership rights are *extended* until the candidate reaches (at which point, the ownership expires).

When ownership rights expire:

- Agency moves from Current agency tab to the Agency history tab in the candidate Talent Record.
- Candidate is removed from the agency's Active candidates tab on their Agency Manager.



Data Insight Tool

DIT has a new req folder attribute for Req referral rights. The field description is:
Agency owned for this Req?

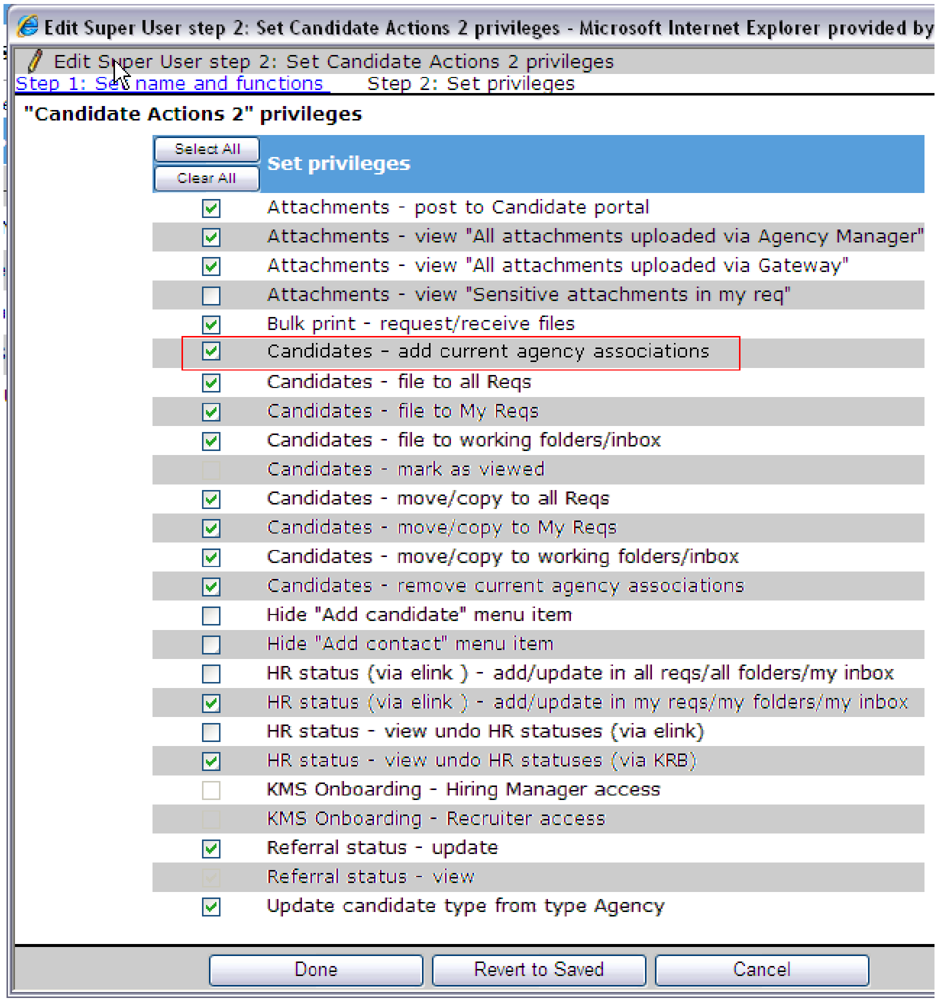
A new field attribute also displays the Req ID for the Candidate agency table.

Workbench Self-Service

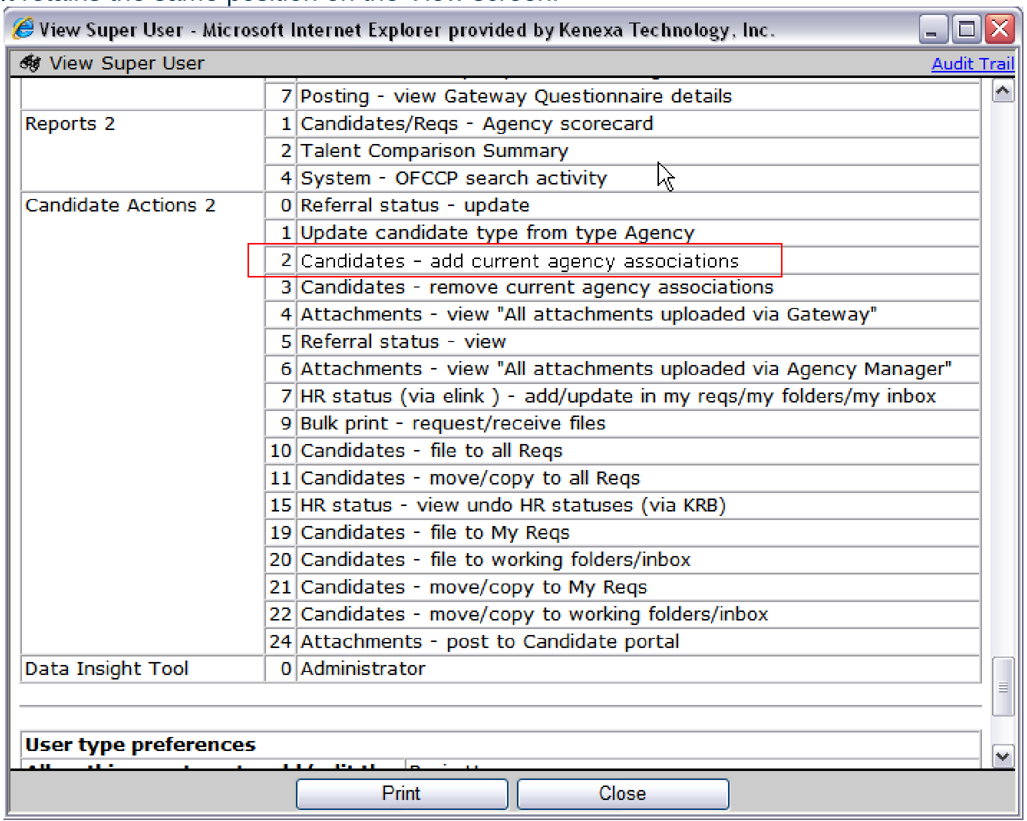
To support per-req agency referral rights, the user type privilege Update candidate type to type Agency privilege has been renamed to:

> **Candidates – add current agency association**

This is a **Candidate Actions 2** privilege that allows 2xB users to add (or remove) an agency association for a candidate. User types with the previously-named "Update…" privilege automatically have the new one.


Edit Super User step 2: Set Candidate Actions 2 privileges - Microsoft Internet Explorer provided by
Edit Super User step 2: Set Candidate Actions 2 privileges
Step 1: Set name and functions
Step 2: Set privileges
"Candidate Actions 2" privileges
Select All
Clear All
Set privileges
Attachments - post to Candidate portal
Attachments - view "All attachments uploaded via Agency Manager"
Attachments - view "All attachments uploaded via Gateway"
Attachments - view "Sensitive attachments in my req"
Bulk print - request/receive files
Candidates - add current agency associations
Candidates - file to all Reqs
Candidates - file to My Reqs
Candidates - file to working folders/inbox
Candidates - mark as viewed
Candidates - move/copy to all Reqs
Candidates - move/copy to My Reqs
Candidates - move/copy to working folders/inbox
Candidates - remove current agency associations
Hide "Add candidate" menu item
Hide "Add contact" menu item
HR status (via elink) - add/update in all reqs/all folders/my inbox
HR status (via elink) - add/update in my reqs/my folders/my inbox
HR status - view undo HR statuses (via elink)
HR status - view undo HR statuses (via KRB)
KMS Onboarding - Hiring Manager access
KMS Onboarding - Recruiter access
Referral status - update
Referral status - view
Update candidate type from type Agency
Done
Revert to Saved
Cancel

It retains the same position on the View screen.



Limitations and Known Issues

The Actions menus for Req folder and Candidate Results grids of the New UI do not yet include an **Add/Remove agency association** action. You must perform this action form a classic 2xB Req folder or Candidate Results screen (accessed from the **Reqs** or **Candidates** top-level menus).

Since multiple agencies and agency contacts can now ‘own’ a candidate simultaneously, each of the agencies can update the profile information of the same candidate.

How Do Clients Get this Feature?

Per-req agency rights are controlled by a new Admin+ Agency code setting maintained by 2xB administrators.

2X BrassRing Admin/Admin+

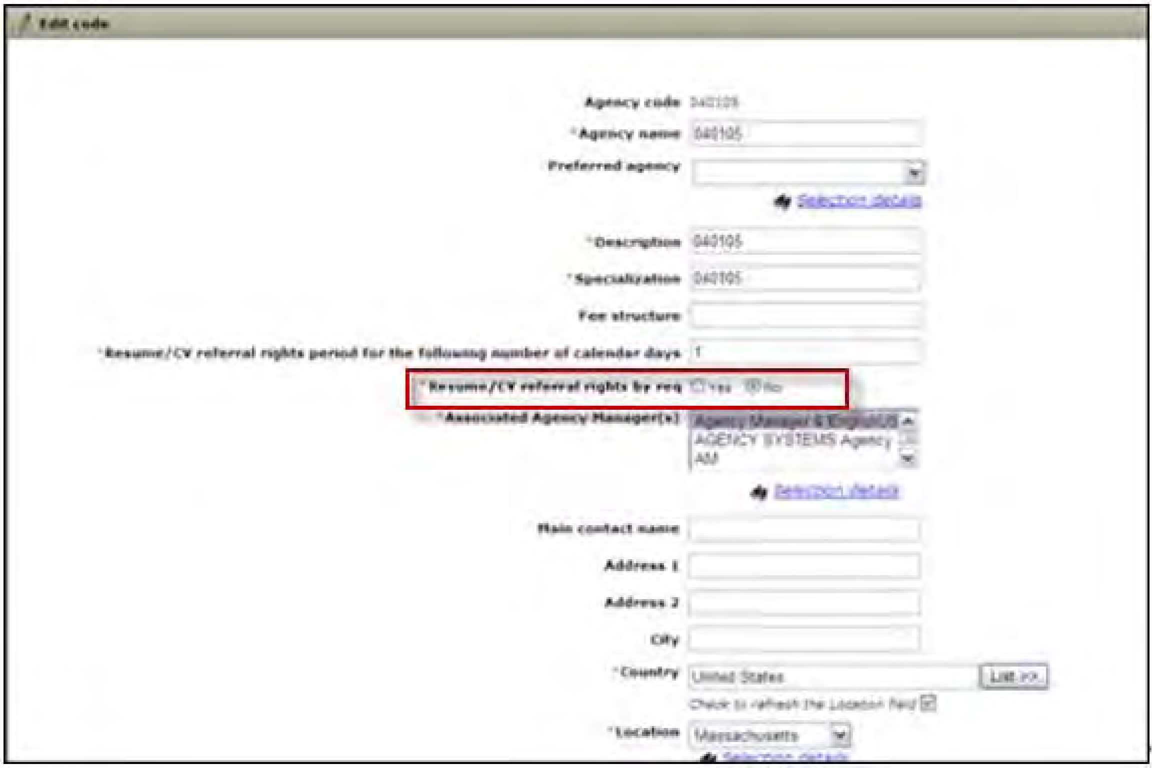
Who does this: 2x BrassRing Administrators

2xB Administrators set the **Resume/CV referral rights by req** option when administering the Agency code list. The field appears on the **Add code, Edit code**, and **View code details** pages.

To set the option if you are an administrator:

1. Select **Admin+** from the **Admin** menu.

6. Select the **Administer code list** icon for Agency Codes.
7. To set the option for an existing agency code, click the **Edit code** icon for that agency.
   To view an agency's code settings, click the **View details** icon for that agency.
   To set the option when adding a new agency code, click **Add new code**.



2. Complete or change the code fields and options and click **Save**.

If the **Resume/CV referral rights by req** option is set to **No**, Agency Manager records and manages when an agency has referral rights to a candidate irrespective of requisition. If the agency currently holds referral rights to a candidate, those rights extend across all requisitions. The default setting is **No** for existing Agency codes.

If **Resume/CV referral rights by req** is set to **Yes** (for agency agreements that limit candidate referral rights to only those requisitions in which the agency has referred the candidate), Agency Manager manages referral rights on a per-requisition basis. If the candidate is being considered for and hired into a requisition for which the agency had not referred the candidate, a payment to the agency for the candidate placement is not necessary.

Automatic Dispositioning of Hired Candidates

Automation Manager supports a new configurable trigger type, **Disposition Hired Candidates across all Reqs**. This trigger automatically updates a candidate's HR status to a designated final status across the **Open** or **On Hold** requisitions the candidate is filed to, once the candidate is updated to the designated "hired" status in one requisition. The trigger runs hourly.

As with all Automation Manager triggers, your organization can configure notifications to alert both 2X BrassRing users when the trigger updates the HR status of any candidate(s) they are working with, and to alert candidates of the status change as well.

Feature Summary Grid

Date Available	US: 17/DEC/2010 EU: 23/DEC/2010
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☐ Workbench Self-Service ☐ 2x BrassRing New UI ☐ 2x BrassRing ☐ Talent Gateways ☐ Agency Manager ☐ Data Insight Tool ☐ 2x SmartApproval ☐ 2x Onboard
Visible Changes	☑ No – contact your CSC for implementation details. ☐ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☐ Specific conditions required – see details below. ☑ Configuration required – contact your CSC for details.

Benefits

This capability is particularly useful for high-volume hiring.Once implemented, 2x BrassRing automatically updates the HR status for hired candidates across all requisitions, thereby ensuring that candidates are in the right HR status for each requisition to which they have been filed within one hour of the update.

Automatic notifications ensure that all affected individuals (both 2x BrassRing users and candidates) know that these updates have been made. Recruiters no longer have to update HR statuses manually in several req folders.

Feature Description

Automation Manager supports a new configurable trigger type, **Disposition Hired Candidates across all Reqs**. This trigger automatically updates a candidate's HR status to a designated final status across the **Open** or **On Hold** requisitions the candidate is filed to, once the candidate is updated to the designated "hired" status in one requisition. The trigger runs hourly.

Your organization can configure notifications to alert 2X BrassRing users in different roles (Req Team member, Hiring Manager, Recruiter, and so forth) when the trigger updates the HR status of any candidate(s) they are working with, and even to alert candidates of the status change.

You can specify which final statuses are subject to the automatic update trigger and the status to which they are updated.

Best Practice Recommendations

NA

Limitations and Known Issues

The system does not automatically update the HR status if it finds that the candidate is already in a final status within a folder.

Known Issue: As of R12.3, Req creators are automatically notified when one of their candidates is put into a final status, whether or not the notification has been built into the automation manager trigger. This will be fixed in the near future.

How Do Clients Get this Feature?

Your certified Workbench user can configure this trigger in Workbench. Contact your CSC for guidance.

Workbench Self-Service

Who does this: Certified Workbench User, Tier 3

Task Overview

Pre-requisites: Your 2x BrassRing templates administrator must create email template(s) for use with this automated trigger if you intend to send notifications to affected 2xB users and/or candidates.

To create a new trigger:

1. You name the new trigger and select the trigger type.
2. You select trigger attributes:

- The candidate criteria that will activate the trigger: the HR Status(es) and the Candidate Type(s).
- The req forms, form fields, and field options (if applicable) to which the trigger will apply.
- The HR Status to which the candidate will be updated to in the other req folders he or she is filed to.

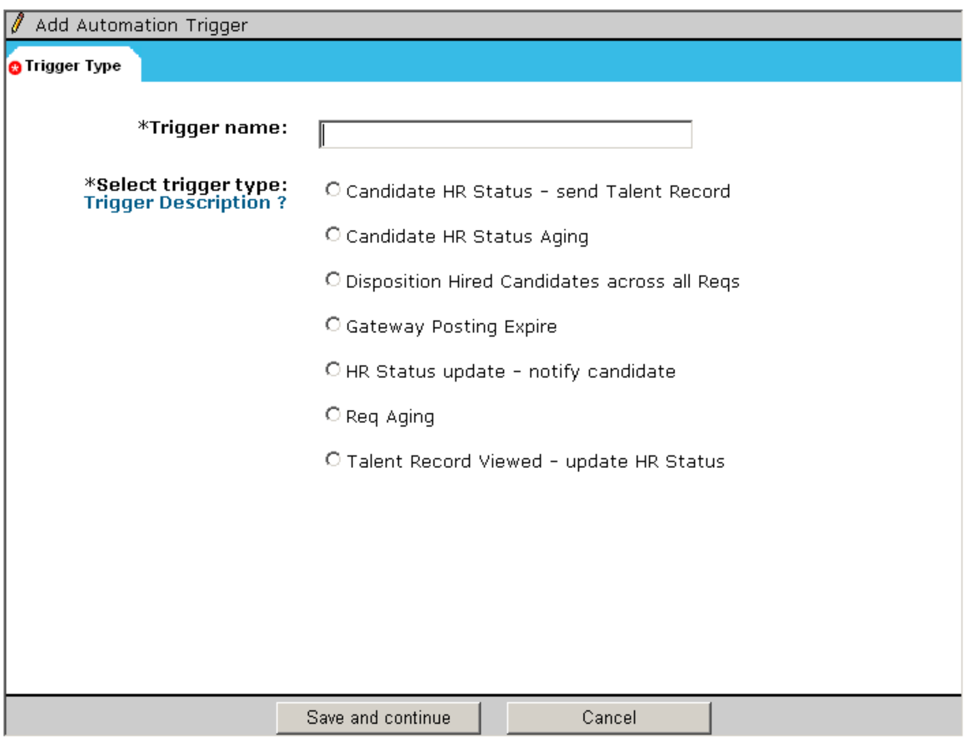
3. Finally, you configure notification criteria for this trigger.

See the next section for details.

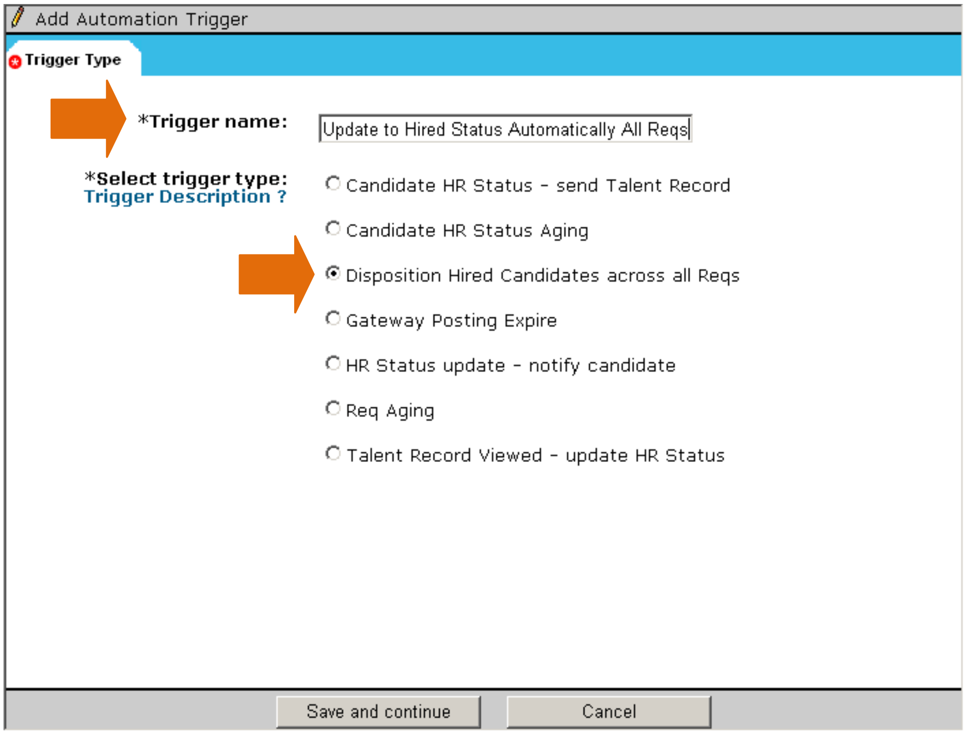
Configuring the New Automation Trigger

To add this automation trigger:

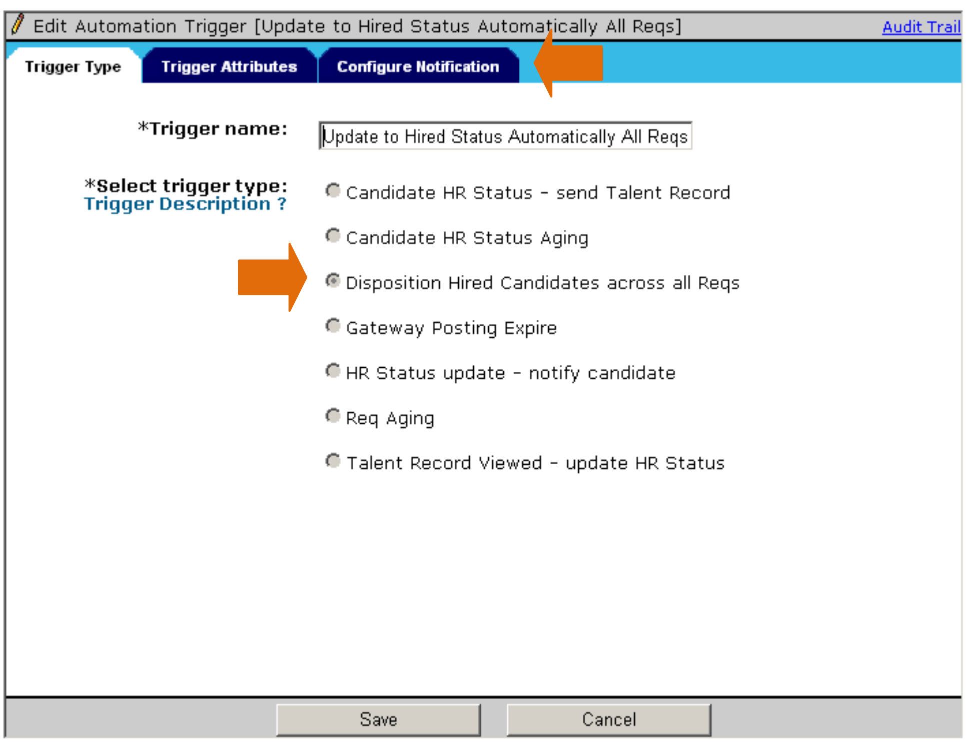
1. In Workbench, select **Tools > Automation Manager > Admin**.
2. Click **Add new trigger** in the **Actions** menu. The **Add Automation Trigger** page displays with no entries or selections.



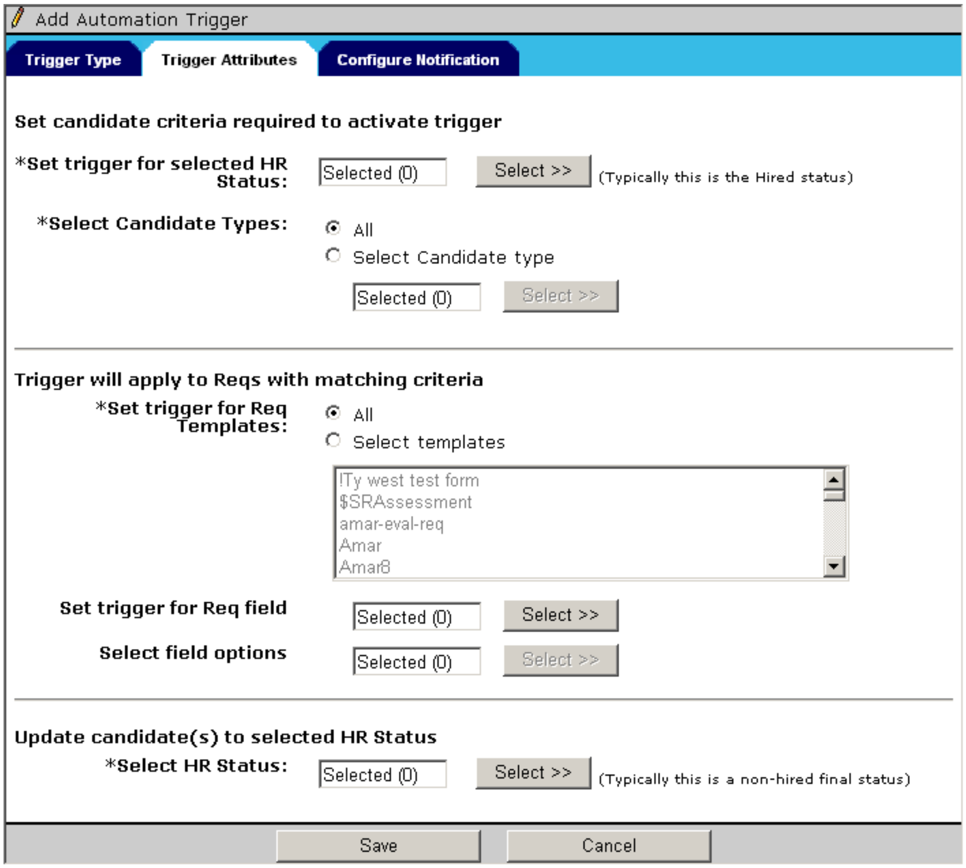
4. Name the trigger and select the trigger type.



5. Click **Save and continue**. The **Trigger Type** tab displays with the trigger name and the trigger type selected. You can edit the trigger name but not the trigger type. Also, the **Trigger Attributes** tab and **Configure Notification** tab have been created.

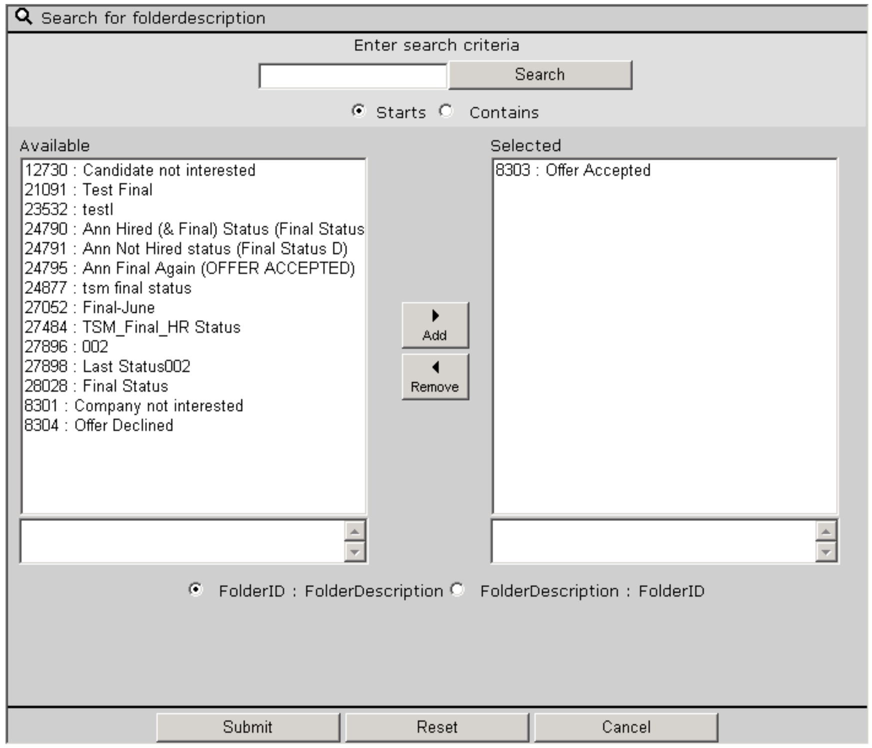


6. Select the **Trigger Attributes** tab. On this tab you can select criteria to filter which candidates and requisitions are updated. Here is a brand new tab with no selections:



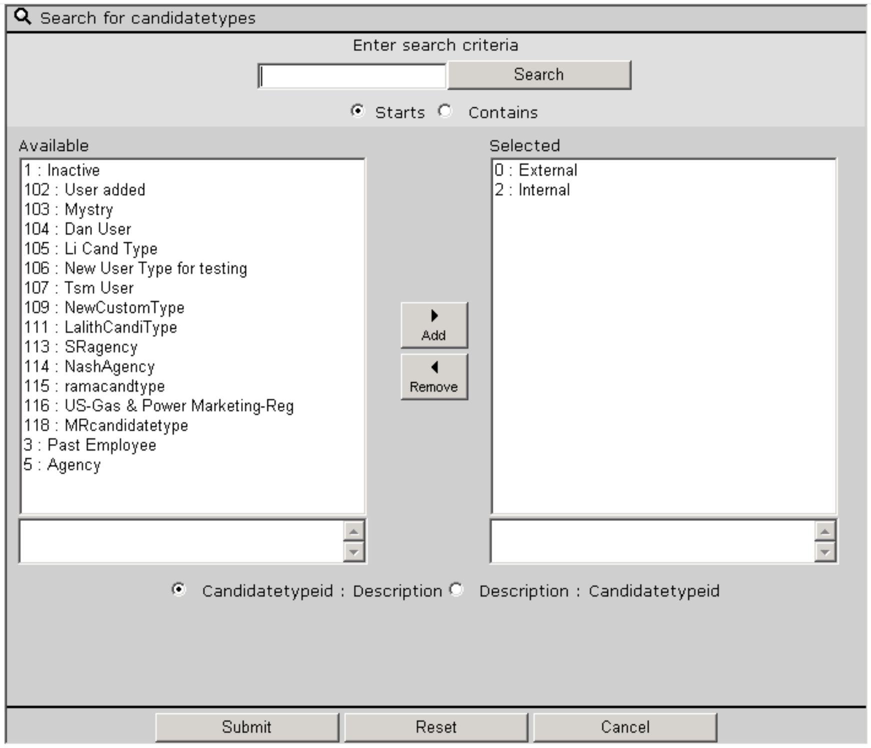
7. Configure the **Trigger Attributes** tab as follows:

Step	Setting	Description
	Set candidate criteria required to activate trigger area	
1.	*Set trigger for selected HR Status	Usually for the HR status(es), you select the status(es) that is(are) equivalent to “Hired” in your organization. ▪ No. of HR status(es) set = 0 (by default) ▪ Click the **Select >>** button to open a search and selection box for HR statuses. Move your selections from the **Available** to the **Selected** box and click **Submit**.

<table>
<tr><td></td><td></td><td>
</td></tr>
<tr><td>2.</td><td>*Select Candidate Types:</td><td>Your selection for Candidate Type can be all candidate types, one candidate type, or more than one candidate types. Click the Select button to search for and select candidate types.

The candidate type(s) could be internal, external, inactive, or any other candidate type that your organization uses to categorize candidates by type. The selections are:
▪ All (the default setting), OR
▪ Select specific Candidate types

Move your selections from the Available to the Selected box and click Submit.</td></tr>
</table>

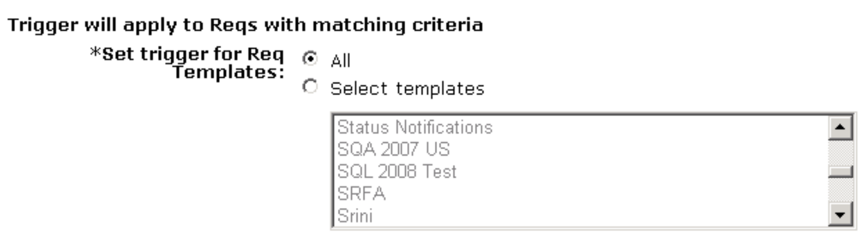


Trigger applies to Reqs with matching criteria

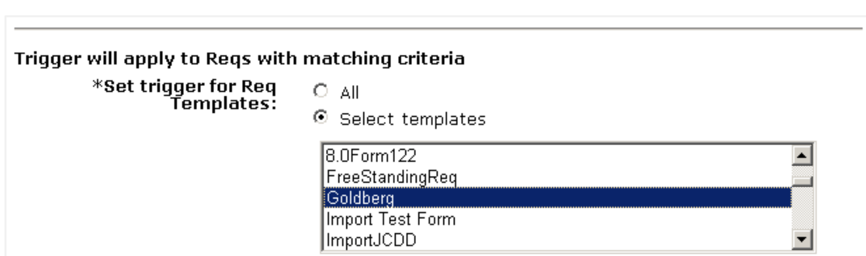
Select req template(s) (sometimes called Req forms) to which the trigger will be applied. When fields in these req templates match the values configured for this trigger, the trigger action occurs.

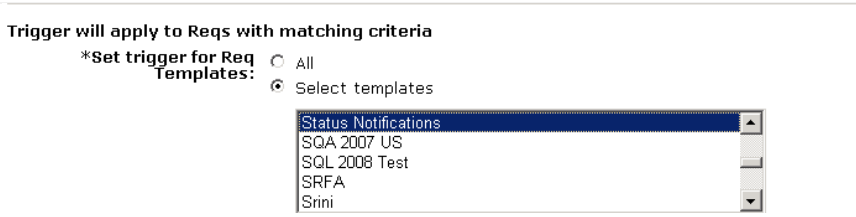
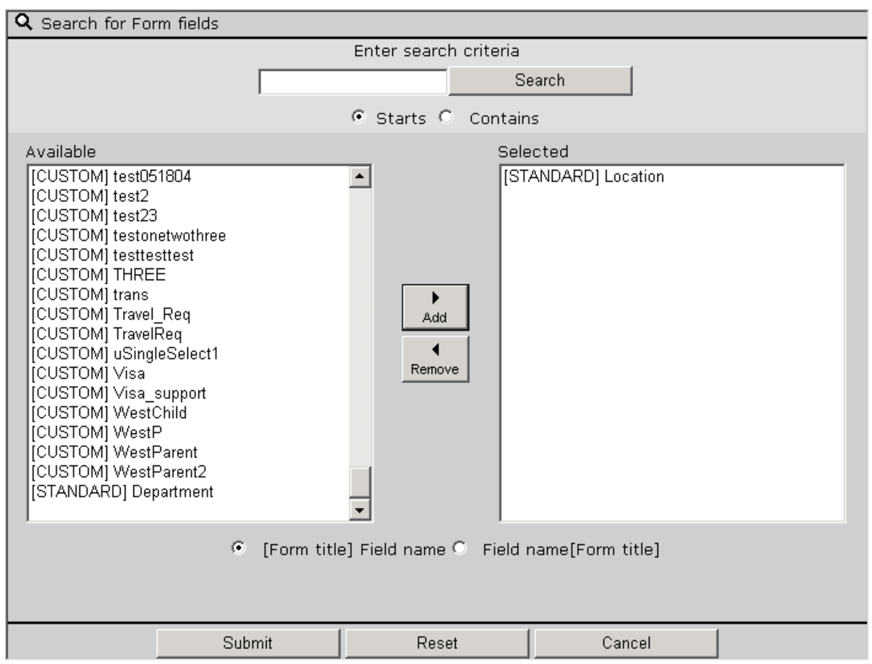
3. *Set trigger for Req templates

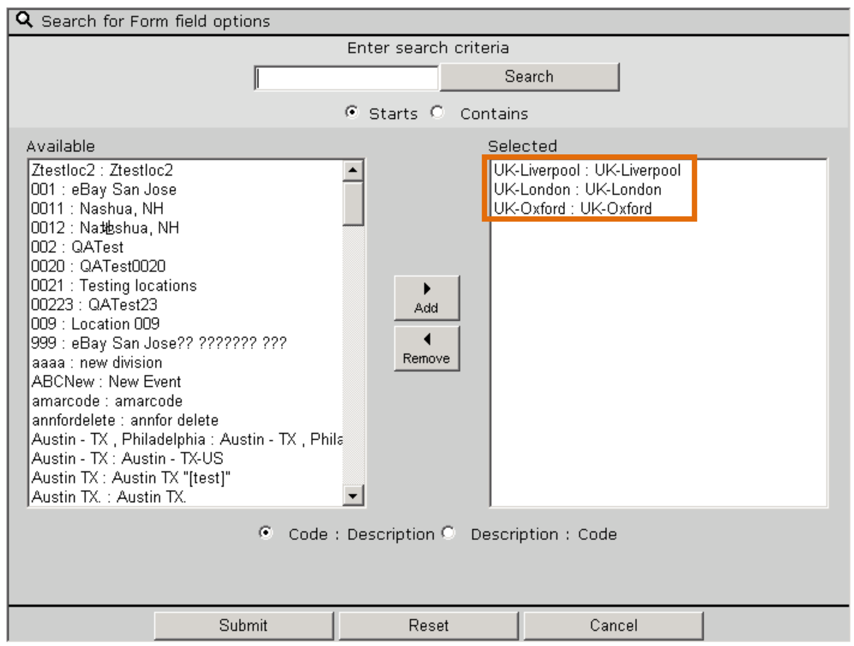
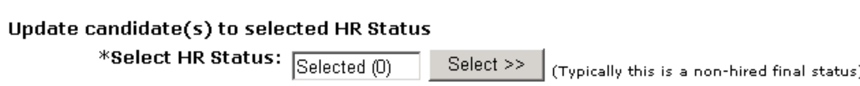
This field is required. By default, all templates are selected.

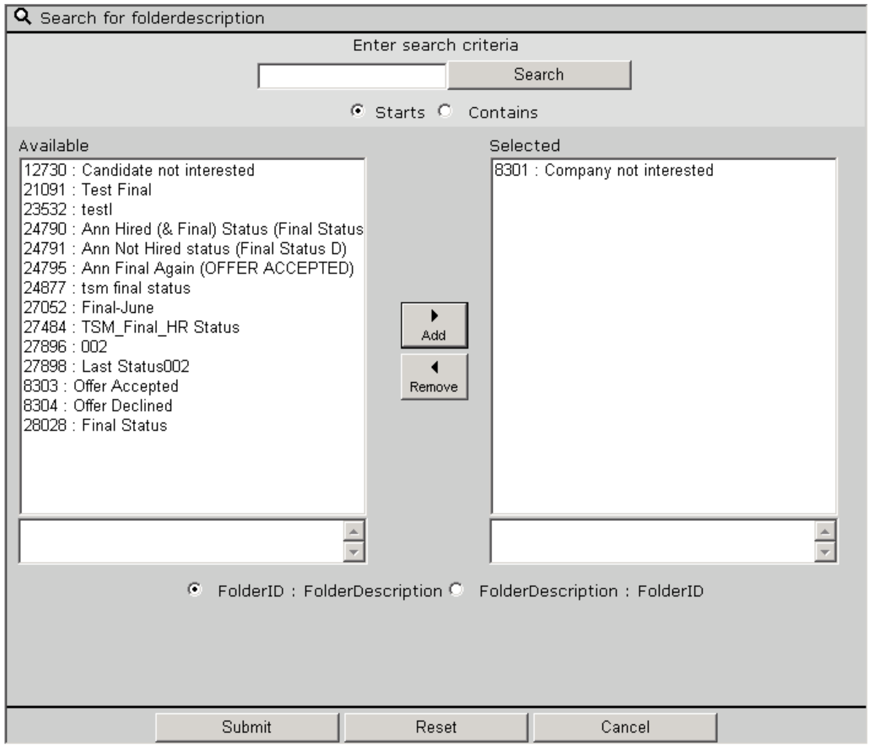


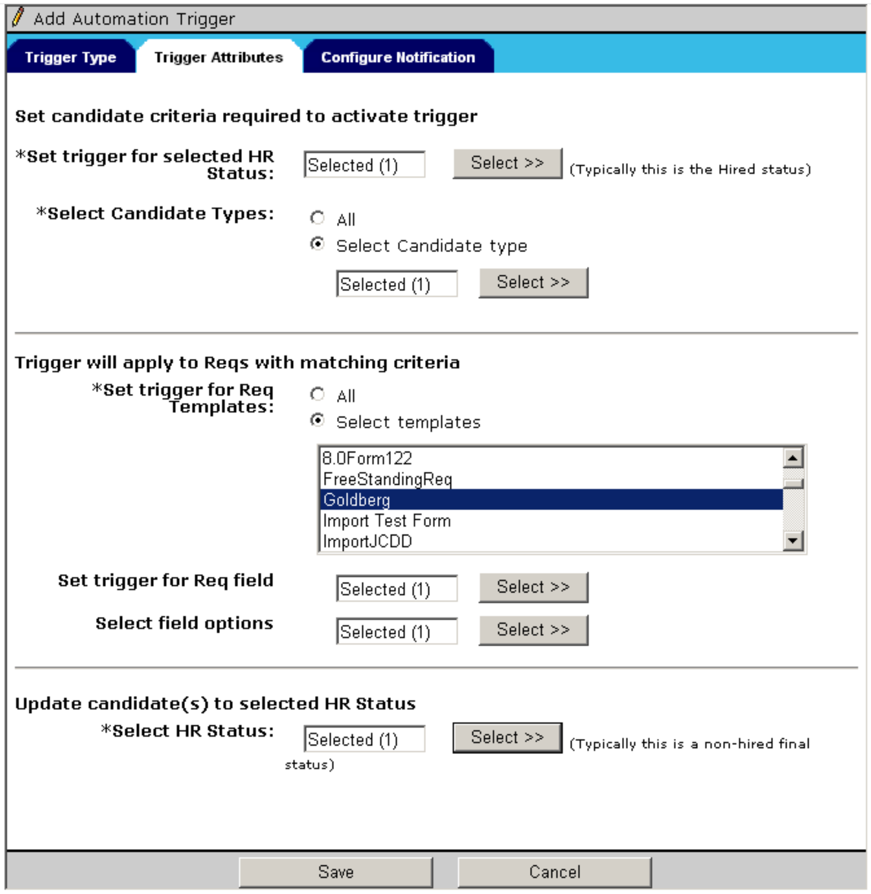
Click the **Select templates** option and select one or more templates from the list.



		
4.	Set trigger for Req field	Refine the trigger to be more specific by selecting one or more req fields that are present on the selected req template(s). This field is not required. By default, no Req fields are selected.  You can select a specific field on your Req template to cause this trigger to run. Click the **Select >>** button to open a search and select box for Req fields. Move your selections from the **Available** to the **Selected** box and click **Submit**. In the screen capture below, **Location** is selected. 
5.	Select field options	Select field options for a selected req form field, if applicable. In the example, the trigger selected for the Req field is “Location.” As a result, the form field options that are available for the Location field are lists of Locations.

		This field is not required. By default, no field options are selected. The **Select >>** button becomes active if, in the previous step, you selected a Req template field that has options for selection, such as **Location** or **Job code**.  Click the **Select >>** button to open a search and select box. Select one or multiple options, as necessary. Three locations are selected in the screen capture below: 
	Update candidate(s) to selected HR Status Select the "non-hired" HR Status to which the candidate(s) updated to the Hired status in the one req folder will be updated to in all other req folders to which they are filed.	
6.	*Select HR Status	This field is required. By default, no HR status is selected.  Click the **Select** button to open the search box and see the list of HR statuses. Move the status to the **Selected** box and click **Submit**. The search window closes. **Important:** The "non-hired HR status" cannot be identical to the "Hired" HR status selected for the first field on the Trigger Attributes tab. If you select the same status for both settings, an error message displays when

		you click **Save**. 
7.		Back on the **Trigger Attributes** tab, you can click **Save** now or wait to configure notifications on the next tab. Note: When you save the **Trigger Attributes** page, if you have selected a req field but have selected not field options, an error message displays directing you to select at least one option. The **Trigger Attributes** tab displays your configured selections:



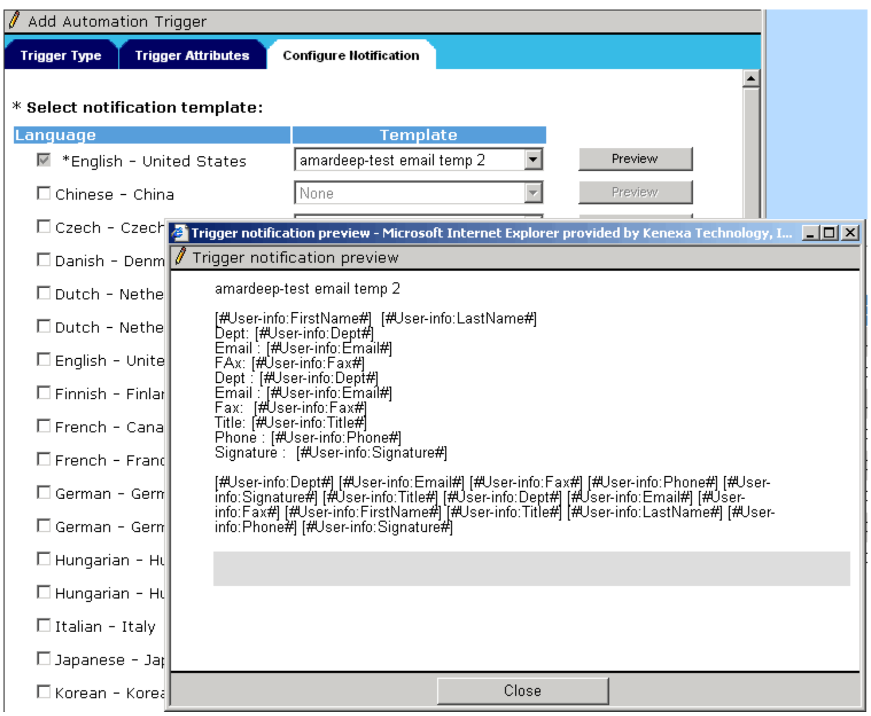
The next step is to configure the notification tab for this trigger.

Configuring Notification Criteria

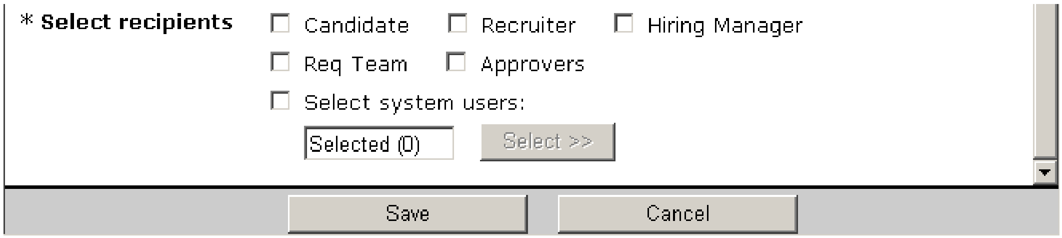
Important: Before configuring this tab, your 2xB Admin+ user or template administrator must create the e-mail template(s) to be used for this notification message.

To configure notifications for this trigger:

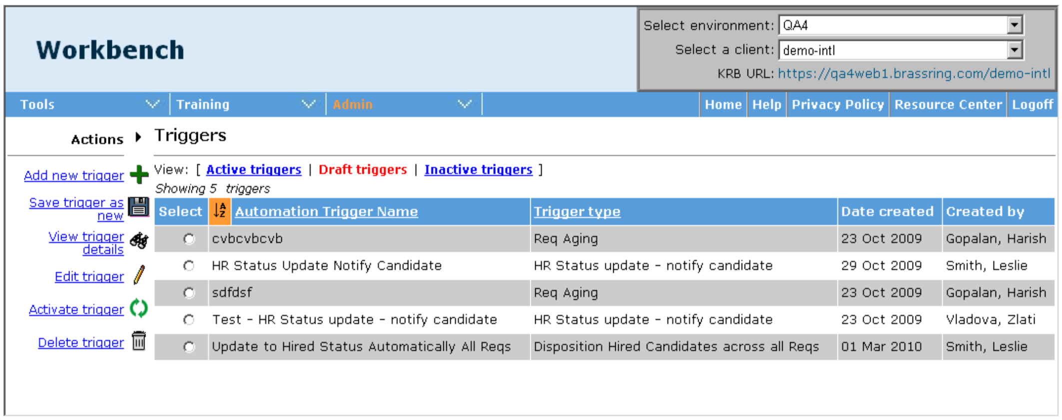
1. Select the **Configure Notifications** tab. On this tab, you select the e-mail template(s) that will be used for the notifications that are sent out when this event is triggered. You also select the recipients of the notifications.
2. Assuming the e-mail templates have been created, select the e-mail template for use in notification associated with this trigger. If necessary, select e-mail templates for all your purchased languages.
3. Click **Preview** to see the e-mail template contents if desired. E-mail templates include text and tokens used in the notification message. Click **Close** to close the **Trigger notification preview** window.



4. Select recipient(s) of the notification. These recipients are notified when a candidate they are working with in their role as Recruiter, Hiring Manger, and so forth, is automatically dispositioned by the trigger.



5. Click **Save.**The new trigger is listed on the **Draft triggers** page.



6. The next step is to activate the trigger. Decide in consultation with your CSC when the trigger should be activated.

Activating the Trigger

Once you are ready to activate the trigger, do the following:

1. In Workbench, select **Tools > Automation Manager**. The **Triggers** page displays.
2. Select the radio button for the trigger you want to activate.
3. Click **Activate trigger** in the **Actions** menu. The trigger starts to work immediately after you activate it. When an HR status is updated, the notification goes out within an hour.

Inactivating HR Statuses Selected for this Trigger

If you try to inactivate an HR status selected for this trigger, the following message displays: “This HR status is used for an Automation Manager trigger and may not be inactivated.”

Inactivating or Deleting Req Fields and Req Field OptionsSelected for this Trigger

If you try to inactivate or delete a Req field used by this trigger, the following message displays: “This field may not be deleted/inactivated while being used in an Automation manager trigger.”

If you try to inactivate or delete a Req field option used by this trigger, the following message displays: “This option may not be deleted/inactivated while being used in an Automation manager trigger.”

2x BrassRing Admin/Admin+

Who does this: 2x BrassRing Administrator

Your 2x BrassRing template administrator must create the e-mail template for the notification associated with this trigger, and possibly for more than one language depending on your organization’s purchased langauges.

Candidate Attachments: Supported File Types

Multi-media file types are now accepted as candidate attachments, including: .avi, .mov, .mp3, .mp4, .mpeg, .mpg, .swf, and .wmv file types.

Product	☐ Workbench Self-Service ☐ New UI ☑ 2x BrassRing ☑ Talent Gateways ☑ Agency Manager ☐ Data Insight Tool ☐ SmartApproval
Visible Changes	☑ No – contact your CSC for implementation details. ☐ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☑ Automatic with no configuration required ☐ Specific conditions required – see details below. ☐ Configuration required – see details below.

Benefits

Accepting a wider range of file types as attachments enables candidates to showcase, and clients to screen, their creative talents.

Feature Description

File attachments can be uploaded for candidates within Kenexa 2x BrassRing as an action on the Talent Record, as well as via Talent Gateways, Gateway Questionnaires, and Agency submissions. Supported file types for candidate attachments include:

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

Limitations and Known Issues

Maximum number of attachments and maximum file size limits remain unchanged. (On a Talent Gateway, maximum number is 15 file attachments per submission, and maximum size is 5MB per attachment. On an Agency Manager, maximum number is 15 per submission, and maximum size is 10MB per attachment. For candidate attachments, the maximum number **per submission** cannot be exceeded, but the total number overall is unlimited.)

How Do Clients Get this Feature?

This feature is available automatically without configuration.

Candidate Portal

Note: If the Candidate portal setting is enabled, the **Include associated Document sub form(s) (if available)** setting will let users send the document sub form with attachments when eLinking a Talent Record.

In this release, Kenexa is introducing the 2x BrassRing *Candidate Portal*. The Candidate Portal provides a secure offer process and location where candidates can retrieve, review, and respond to offer documents. (**Note:** Your organization can use the Candidate Portal for any type of document created in 2x BrassRing you want to handle in this manner.)

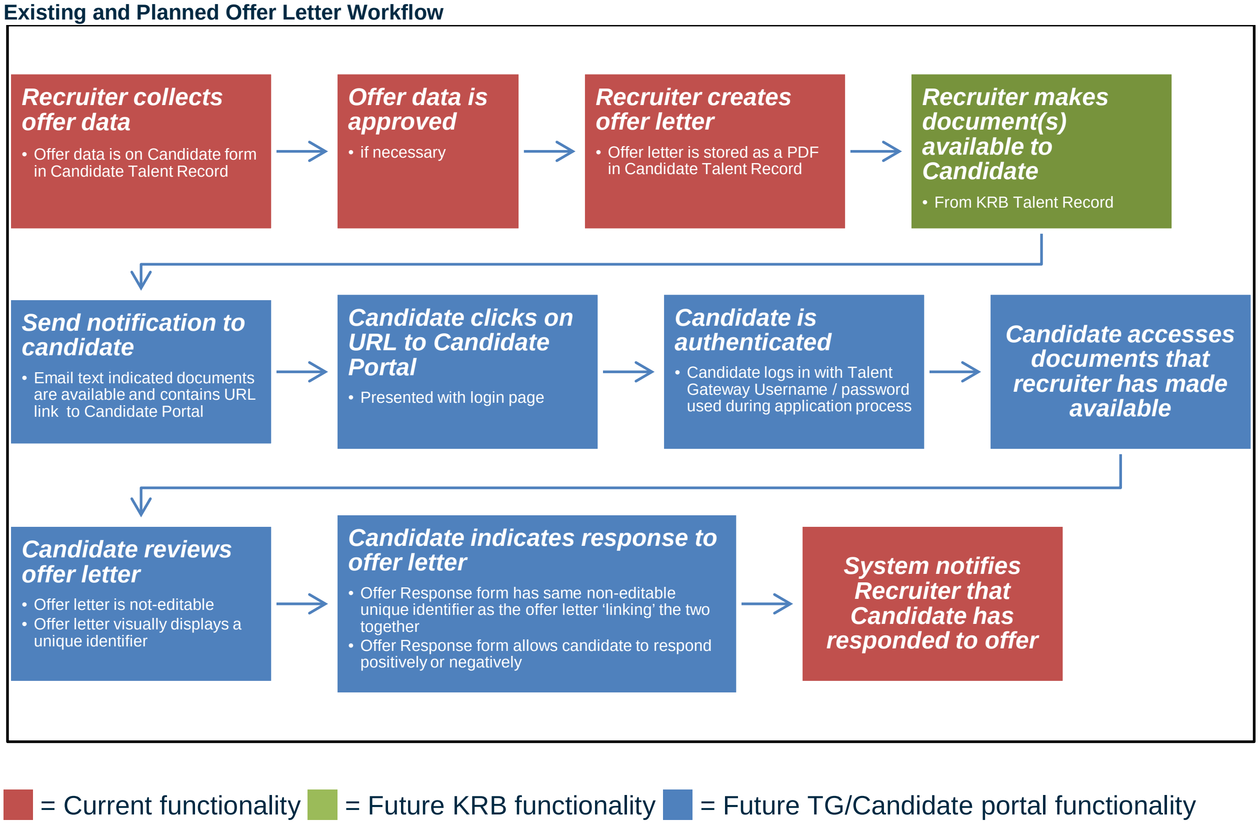
When an offer is ready, the 2x BrassRing user can post the document out to the Candidate portal, send the candidate an email. The designated candidate receives an e-mail (with an eLink to the secure Candidate Portal), from which he or she can log into the Candidate Portal with the same login credentials (username and password) used to apply to the position.

The Candidate Portal stores a link to the PDF version of the Offer letter and to the corresponding response form to record the acceptance or decline of the offer.

Each offer letter PDF has a unique ID. Offer letters cannot be edited.

Each response form has a unique ID that corresponds to the unique ID of the offer letter PDF. The form can contain legal text and a check box that, when checked, constitutes the candidate's electronic signature.

Existing and Planned Offer Letter Workflow



Feature Summary Grid

Date Available	US: 22/APR/2010 EU: 28/APR/2010
Product	☑ Workbench ☑ Workbench Self-Service ☑ 2x BrassRing New UI ☑ 2X BrassRing Classic
Visible Changes	☐ No – contact your CSC for implementation details. ☐ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☐ Specific conditions required – see details below. ☑ Configuration required – contact your CSC for more information.

Benefits

Organizations can make offers and candidates can respond to offers in a secure and private location.

Limitations and Known Issues

The following items are out of scope for this initial release of the Candidate Portal:

- Other documents or attachments other than documents created with a document template
- Candidate forms to view or complete
- Assessments

How Do Clients Get this Feature?

Contact your Kenexa consultant for help with this feature.

Major Configuration Tasks

The major steps for configuring the Candidate Portal are:

1. Turn on the **Candidate Portal** client setting.

Note: Your Kenexa consultant or Certified Workbench user can perform Steps 2 through 6:

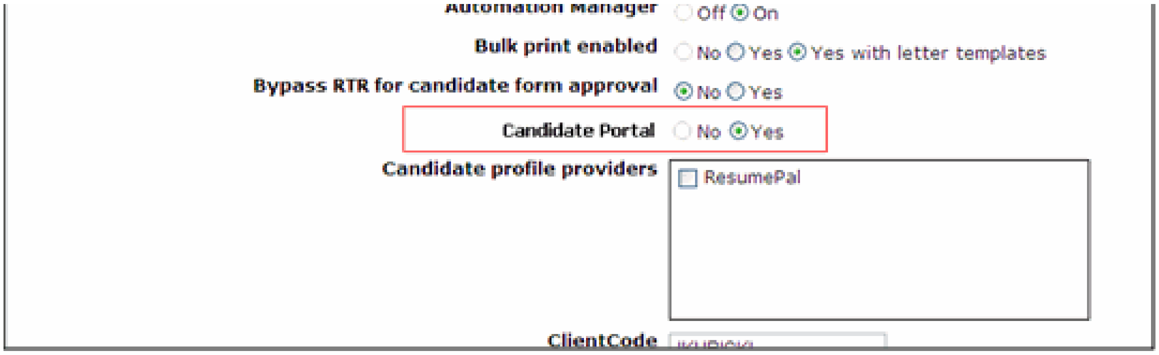
2. Enable the **Candidate Actions 2** user type privilege, **Attachments – post to candidate portal** for the appropriate user types in your organization.
3. Create the Document subsidiary form to be used as the Offer/Response form. In this step, you configure form attributes.
4. Configure form field attributes for the OfferResponse form.
5. Configure the Talent Gateway that will be the Candidate Portal.
6. Customize text for the Candidate Portal using the Text Customization tool:
    - **Landing logged** in tab
    - **Candidate Portal** tab

Note: Your Kenexa consultant or your 2x BrassRing Administrator for the Communications Module performs the following tasks:

7. Create Offer document template in 2x BrassRing. Kenexa or 2xB Admin for Communications
8. Configure the Offer e-mail template in 2x BrassRing. Kenexa or 2xB Admin for Communications Module

1 Turn on Client Setting

Turn on the **Candidate Portal** client setting. (Kenexa)



Your Kenexa consultant or your Certified Workbench User can perform the next several steps.

2 Enable User Type Privilege

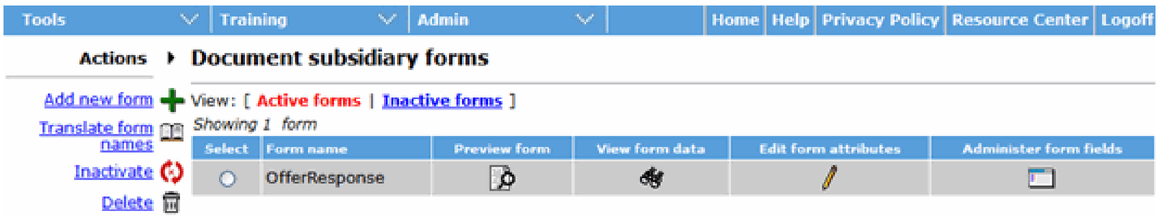
This setting controls the display of the push pin for (for appropriately configured documents) in the **Post to Candidate portal** column on the **Talent Record Attachments** tab.

Check the **Candidate Actions 2** user type privilege **Attachments – post to Candidate portal**. **Note:** Certified Workbench users (Tier 2 or higher) can do this.

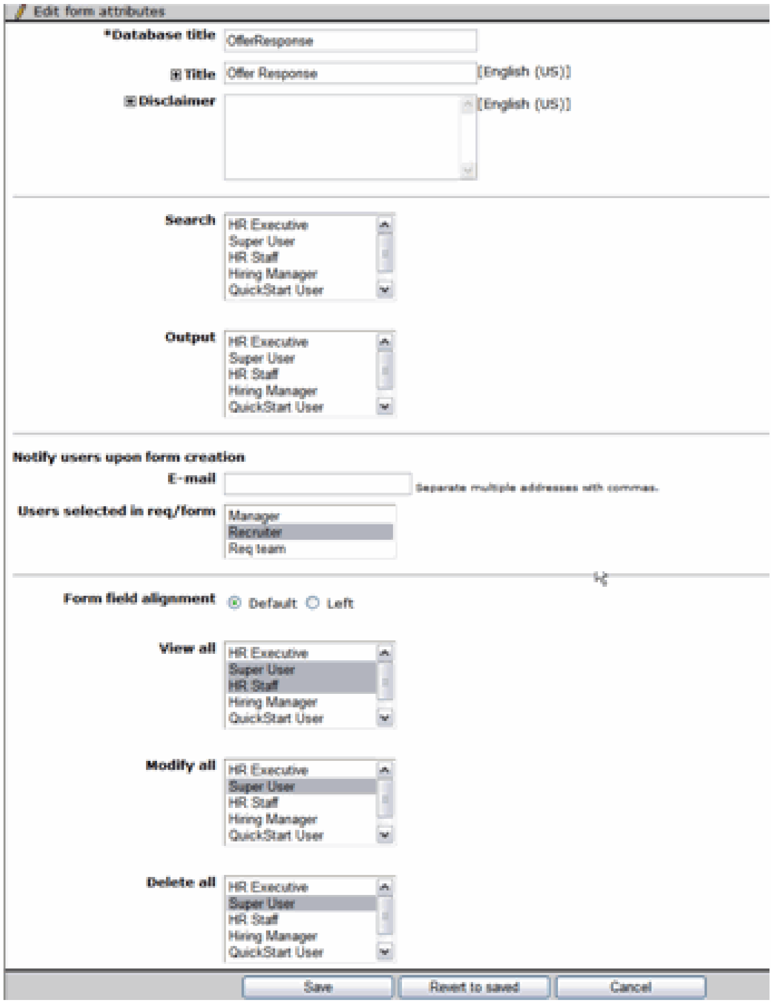
3 Create the Document Subsidiary Form

Configure the **Document subsidiary form** in Workbench (for example, an Offer Response form). (This is new functionality in Workbench.) **Note:** Your organization can create several Document subsidiary forms to accommodate your organization's needs.

1. Select Tools **> Forms > Document subsidiary forms**. The **Document subsidiary forms** page displays.



2. Click **Add new form** in the **Actions** menu.
3. The **Edit form attributes** window displays. See a description of each setting on the next page.



4. Configure the form attributes. Document subsidiary form attributes are similar to candidate form attributes with the following exceptions:

   - Notify users upon form creation: Select the e-mail addresses and/or users who should be notified when the candidate clicks the **Save** button on the Candidate Portal.
   - Customers can select or add e-mail addresses for individuals and individuals in roles (**Manager**, **Recruiter**, **Req team**) to be notified when the candidate clicks **Save** on the Candidate Portal.
   - There is no “Add/view/modify my” form privilege for this type of form (because all forms would be created by the candidate)
   - **View all**, **Modify all**, and **Delete all** work similar to Candidate forms.

Document Subsidiary Form Attributes

Setting	Description
Database title	Enter an informative database title for the form. The example database title is “OfferResponse”.
Title	Enter an informative display title for this form. If your organization has purchased more than one language, enter translation for the form Title in additional language(s).
Disclaimer	Enter a disclaimer message for this form if necessary. Enter translations of the

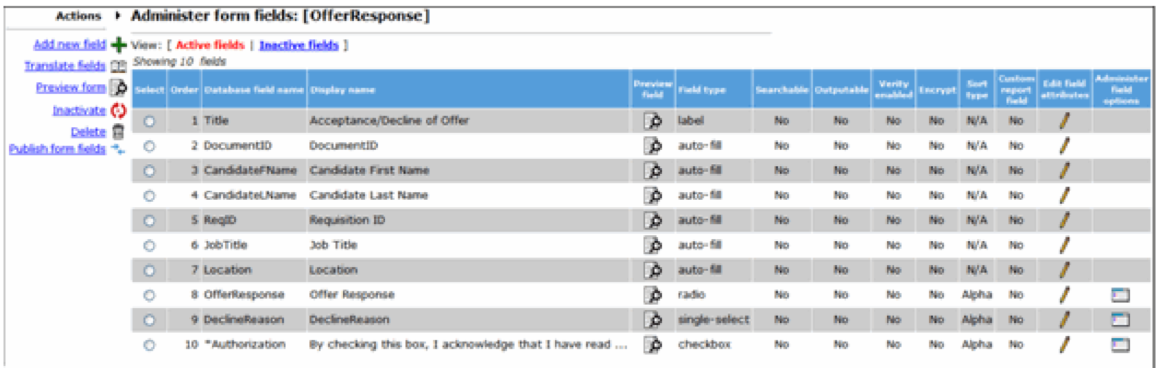
Setting	Description
	message for other purchased languages if necessary.
Search	Select 2x BrassRing user types who can search for this form.
Output	Select 2x BrassRing user types who can output this form.
Notify users upon form creation	▪ E-mail: Enter one or multiple e-mail addresses; separate multiple addresses with commas. ▪ Users selected in req/form: Manager, Recruiter, and/or Req team.
Form field alignment	Select the form field alignment: Default (Center) or Left.
View all	Select 2x BrassRing user types who are allowed to view all Doc sub forms of this type.
Modify all	Select 2x BrassRing user types who are allowed to edit all Doc sub forms of this type. The **Edit form** button on the Document Sub form is visible in 2x BrassRing to the user types you select here.
Delete all	Select 2x BrassRing user types who are allowed to delete all Doc sub forms of this type. The **Delete** button on the Document Sub form is visible in 2x BrassRing to the user types you select here.

4 Configure Form Field Attributes for the Doc Subsidiary Form

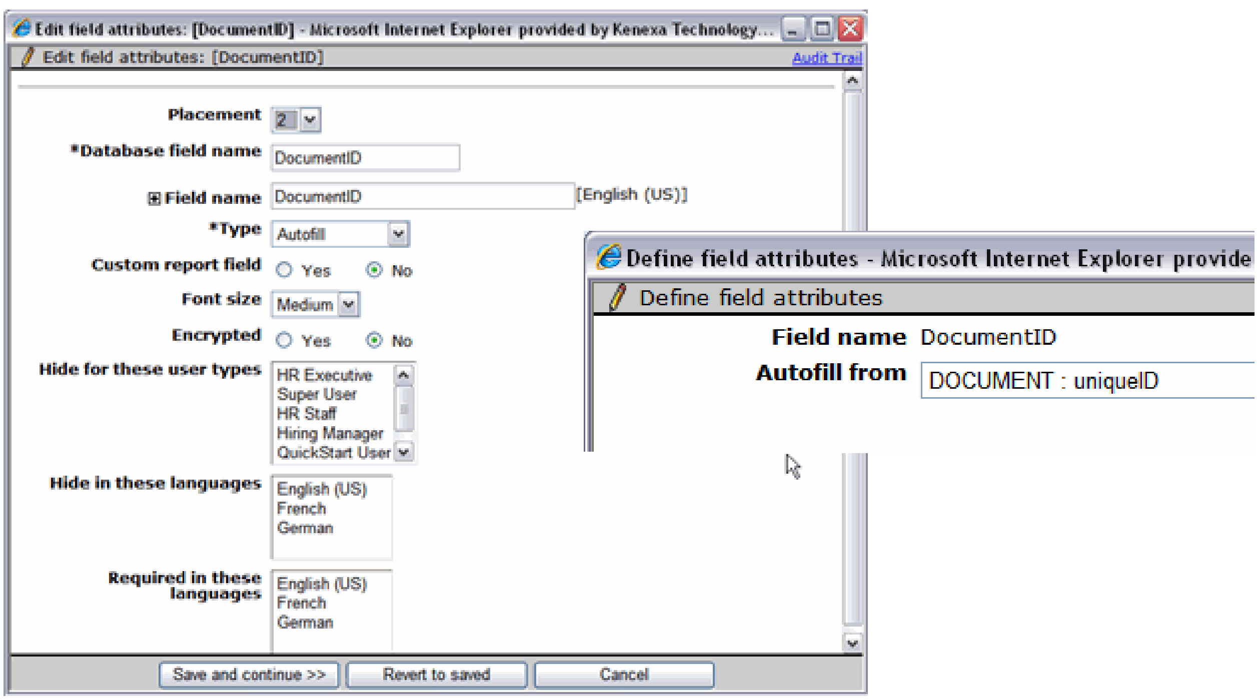
The next step is to configure form fields for the OfferResponse Document subsidiary form.

Doc subsidiary forms have a new auto-fill source: Unique ID. This unique identifier for the form ties the Offer response to the Offer document (PDF).

Path: **Tools > Forms > Document subsidiary forms > Edit fields > Add new field > Autofill > Save and continue > DOCUMENT: uniqueID**

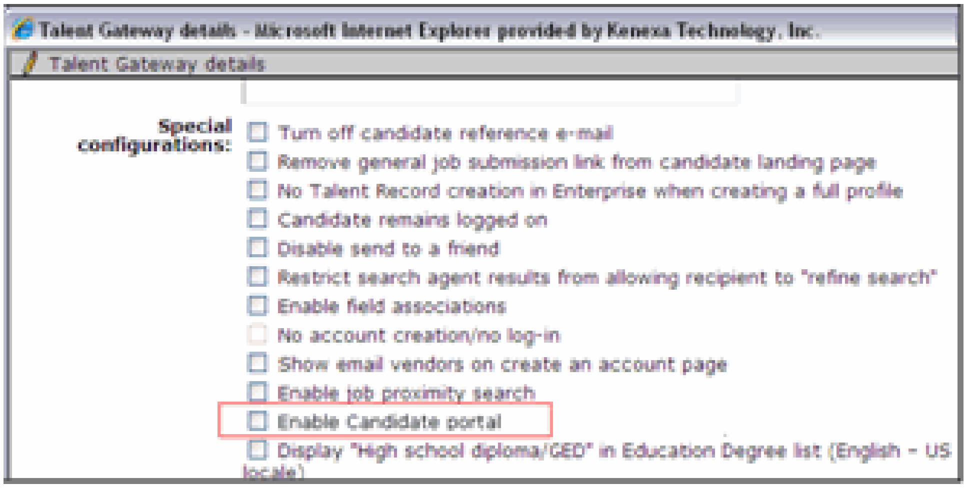


Click **Administer form fields** for the Document sub form you just created. Configure the DocumentID field using the settings below.



5 Configure the Candidate Portal

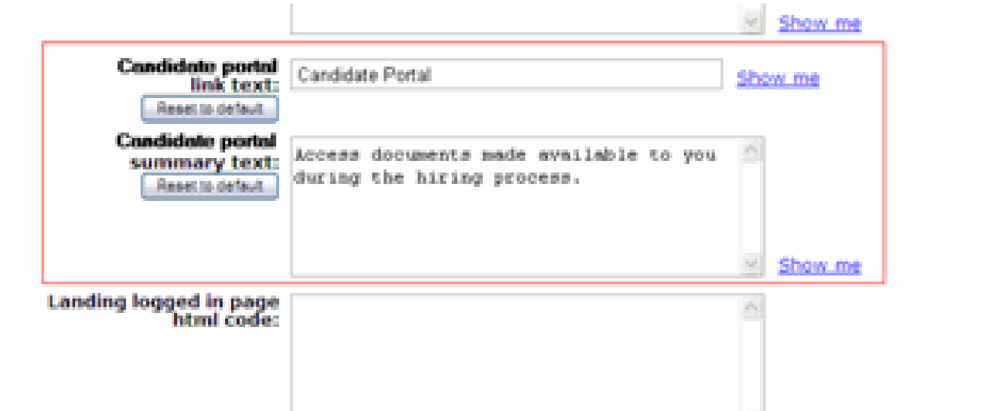
Configure an existing or new Talent Gateway to be the Candidate Portal. Navigate to the **Special configurations** section on the **Talent Gateway details** page and check the box for **Enable Candidate portal**.



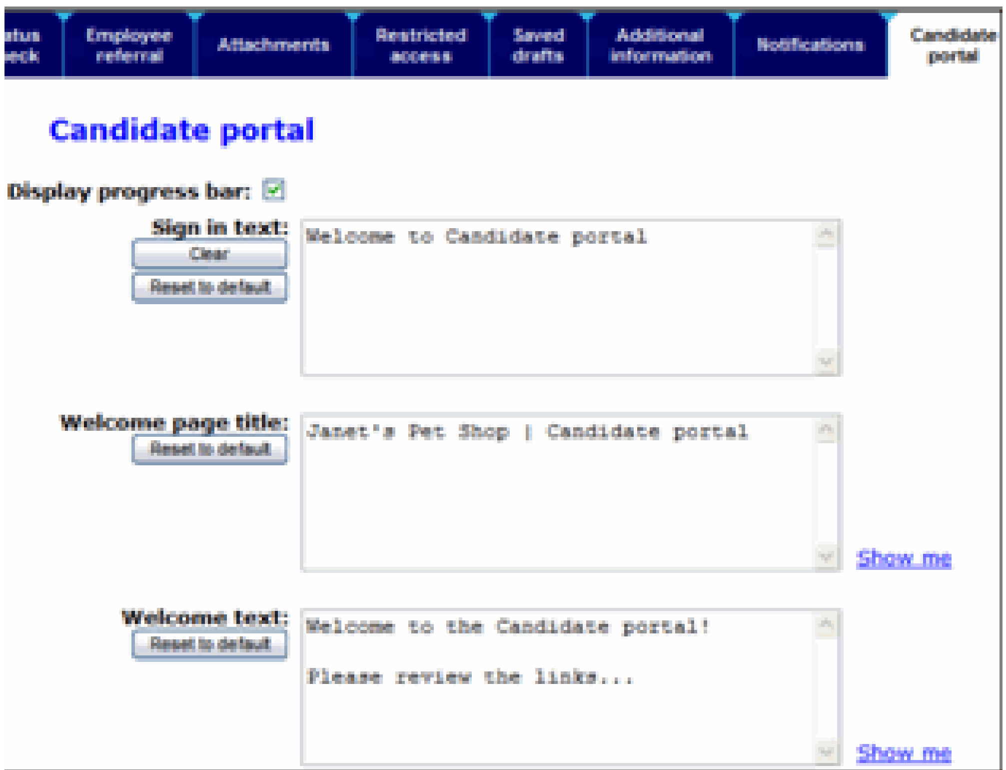
6 Customize Candidate Portal UI Text

Customize text in the following locations in the text customization interface: **Landing logged in** tab and **Candidate Portal** tab.

On the **Landing logged in** tab, configure the following settings for UI text messages on the Candidate Portal: **Candidate portal link text** and **Candidate portal summary text**.



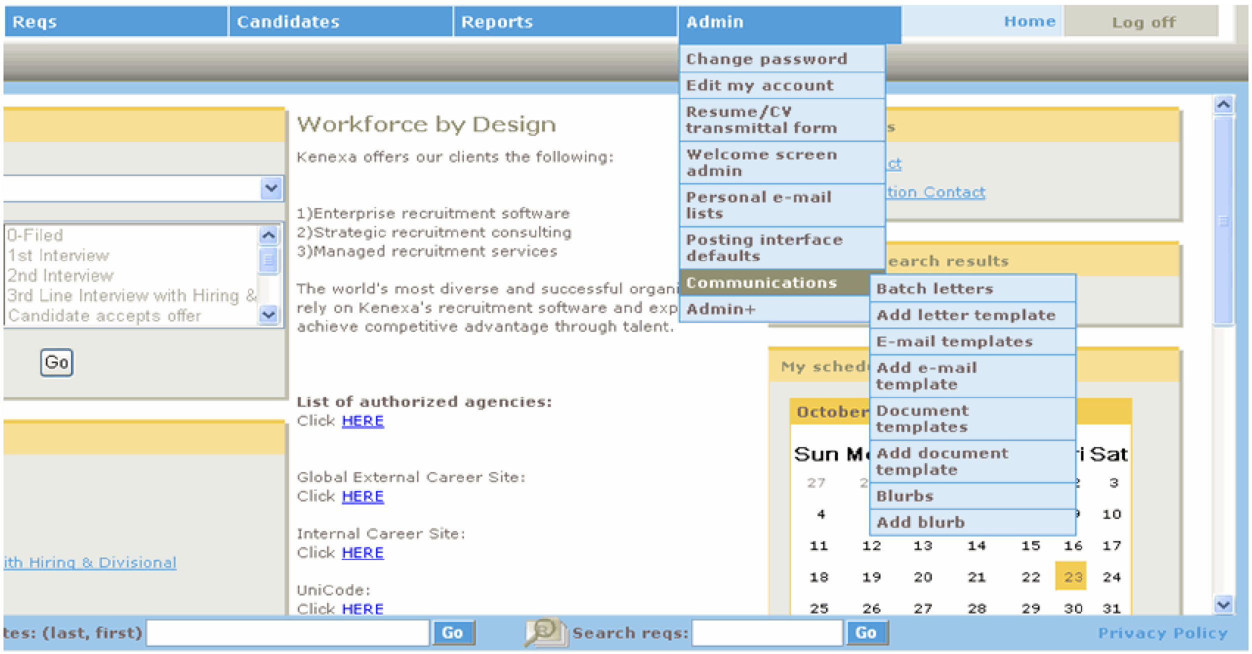
On the **Candidate Portal** tab, configure UI text messages for the following settings: **Display progress bar**, **Sign-in text**, **Welcome page title**, and **Welcome text**.



7 Create the Offer Document Template

In 2x BrassRing Communications Module, create Document template(s) to be used for the Offer Document(s).

Select Admin > Communications > Add document template.



Configure the document template to allow posting to the Candidate Portal.

New merge field category and merge field: There is a new merge field category, **Document properties**, included in document templates that are used with document subsidiary forms and Candidate Portal activities. This category includes a new merge field called **Unique Identifier**. Both are available for use in document templates only when the Candidate Portal client setting is enabled.

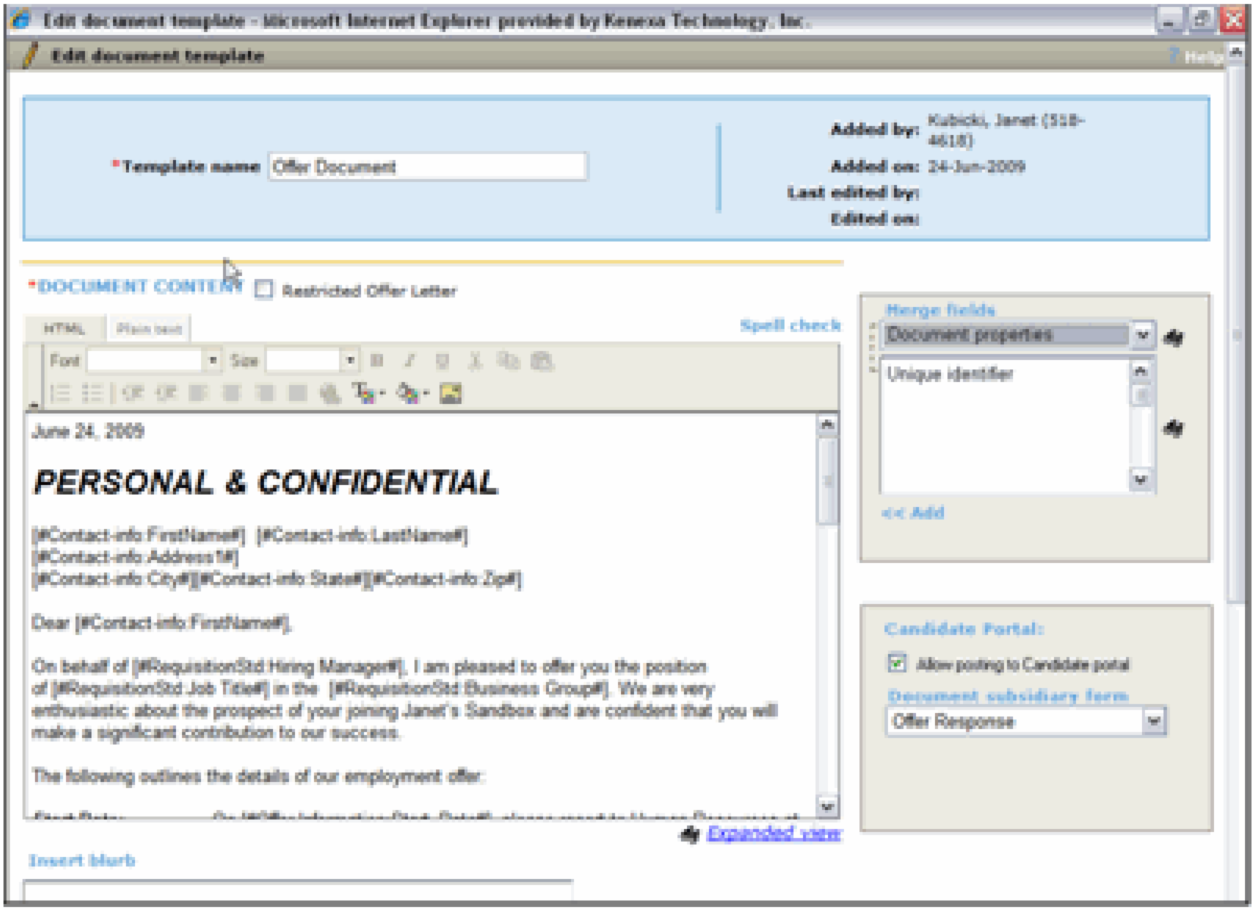
The **Unique Identifier** merge field is the logical and visual link between the offer letter (PDF) and the Offer response (the Document subsidiary form). You can place this merge field anywhere within the Document template.

Candidate portal section of the document template: The Candidate portal section appears on the document template if the client setting of Candidate portal is enabled.

Select the **Allow posting to Candidate portal** check box to enable the document template for the candidate portal. Once checked, any document created with this template (past or present) will can be posted to the Candidate Portal.

Identify which document subsidiary form should be attached to this document.

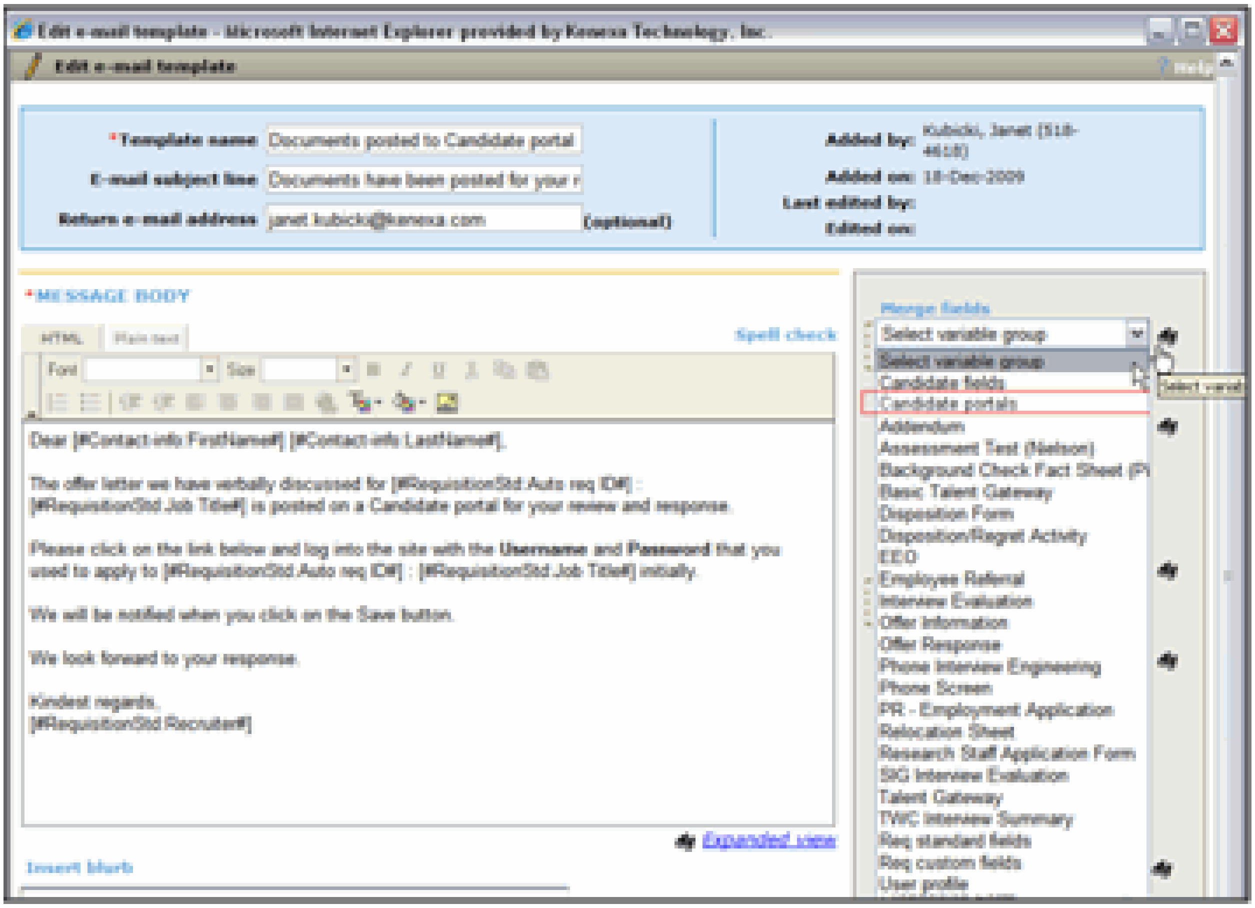
This field is not required. If the client wants to post a document created in KRB but does NOT need a documented response, a Document subsidiary form is NOT required.


Edit document template - Microsoft Internet Explorer provided by Kenexa Technology, Inc.
Edit document template
Help
*Template name
Offer Document
Added by: Kubicki, Janet (518-4618)
Added on: 24-Jun-2009
Last edited by:
Edited on:
*DOCUMENT CONTENT
Restricted Offer Letter
HTML
Plain text
Spell check
Font
Size
June 24, 2009
PERSONAL & CONFIDENTIAL
[#Contact-info:FirstName#] [#Contact-info:LastName#]
[#Contact-info:Address1#]
[#Contact-info:City#][#Contact-info:State#][#Contact-info:Zip#]
Dear [#Contact-info:FirstName#],
On behalf of [#RequisitionStd:Hiring Manager#], I am pleased to offer you the position of [#RequisitionStd:Job Title#] in the [#RequisitionStd:Business Group#]. We are very enthusiastic about the prospect of your joining Janet's Sandbox and are confident that you will make a significant contribution to our success.
The following outlines the details of our employment offer:
Expanded view
Insert blurb
Merge fields
Document properties
Unique identifier
<< Add
Candidate Portal:
Allow posting to Candidate portal
Document subsidiary form
Offer Response

8 Create the Offer E-mail Template(s) for Offer E-mail

In 2x BrassRing, update or create an e-mail template with a link to the Candidate Portal.

New merge field category and merge field: There is a new merge field category, **Candidate portal**, which includes a new merge field called **Candidate portal**. This category of tokens is available for use in e-mail templates only when the Candidate Portal client setting is enabled. **Note:** The name of the "Candidate Portal" merge field category and token cannot be changed.



Recruiter Experience

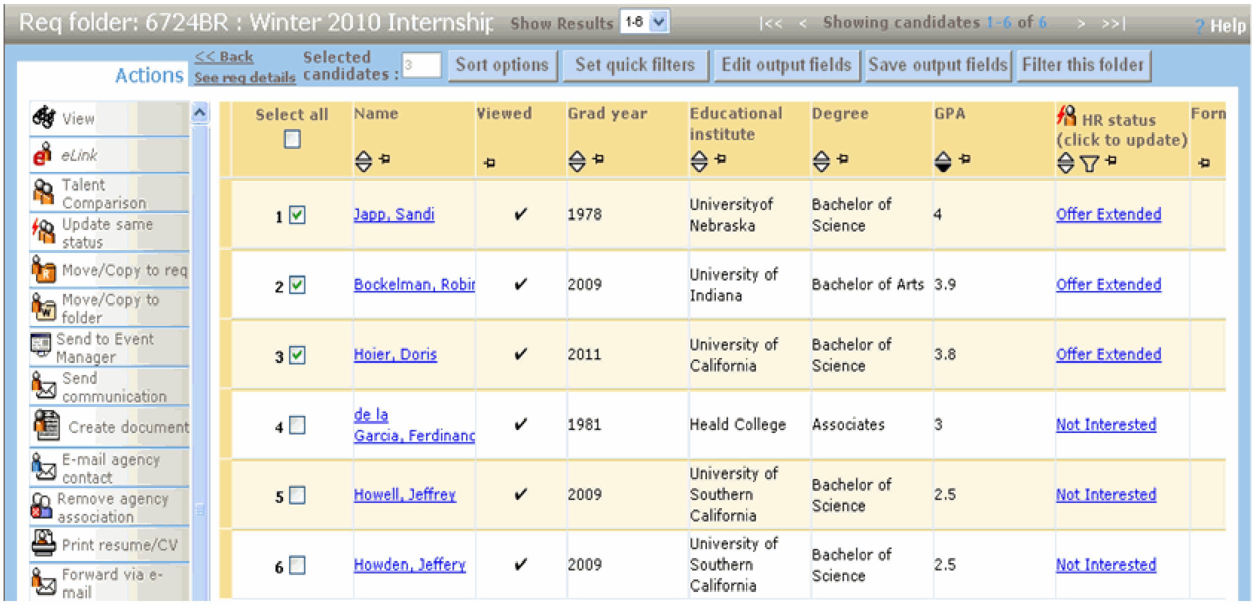
This section assumes that the following tasks have been completed:

- The Candidate Portal feature has been turned on for your 2x BrassRing deployment.
- The Offer/Response Document subsidiary form has been created and is available for use.
- The Offer document template has been created and available for use. It must be configured to allow posting to the Candidate Portal.
- The Offer e-mail template has been created.
- Recruiters or other 2x BrassRing users who will post to the Candidate Portal have the necessary user type privileges.

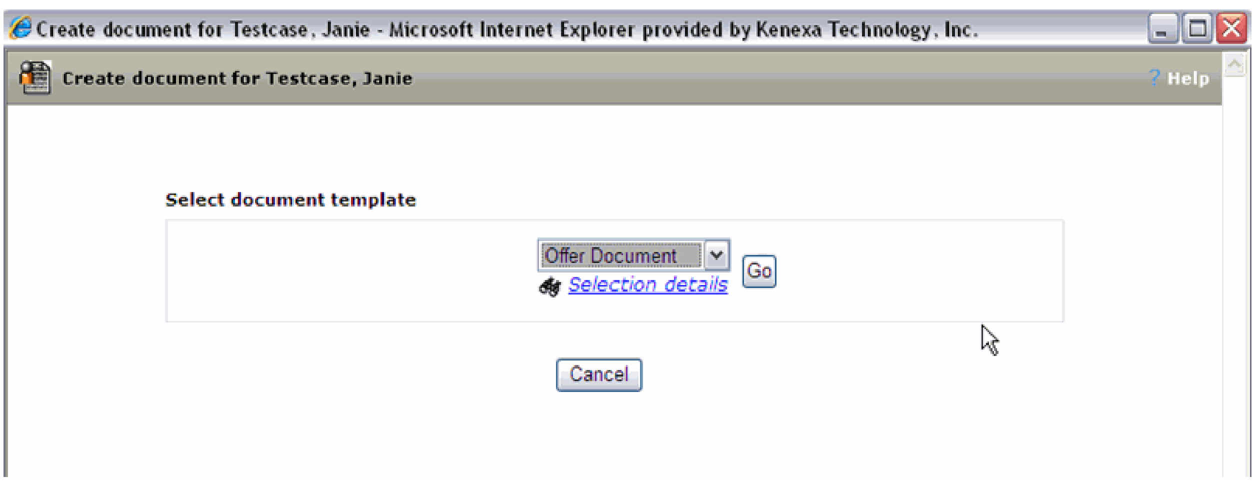
Creating the Offer Document

To create the offer document(s):

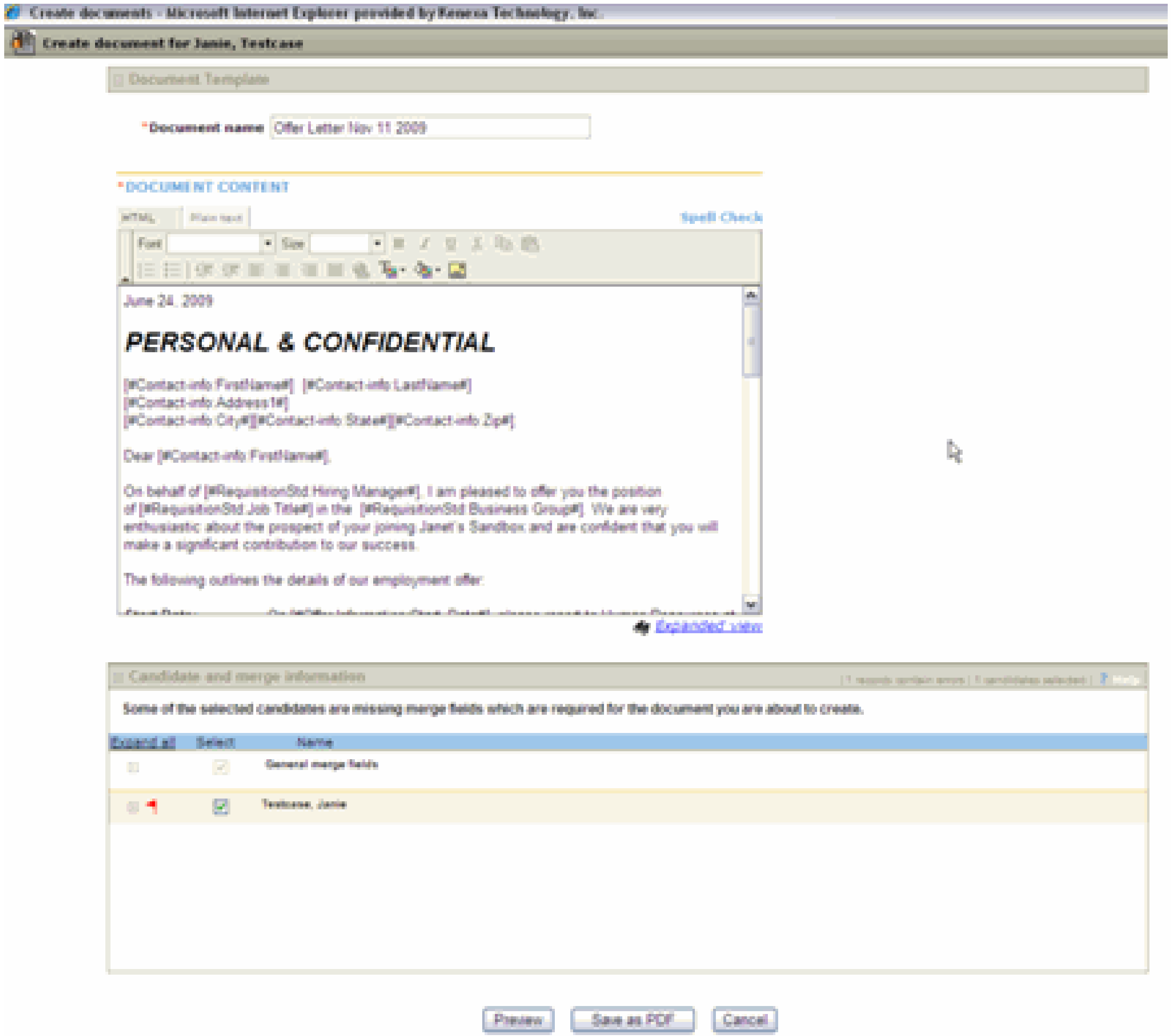
1. In 2x BrassRing, navigate to the Req folder to which the candidate or candidates are filed. [Note:]() You can also do this task from the candidate's Talent Record.
2. Select the checkbox for each candidate to receive the Offer document.
3. Click **Create document** in the **Actions** menu.



4. The **Create document for <candidate name>** displays.
5. Select the document template to be used for this Offer document.



6. Edit the document as necessary.

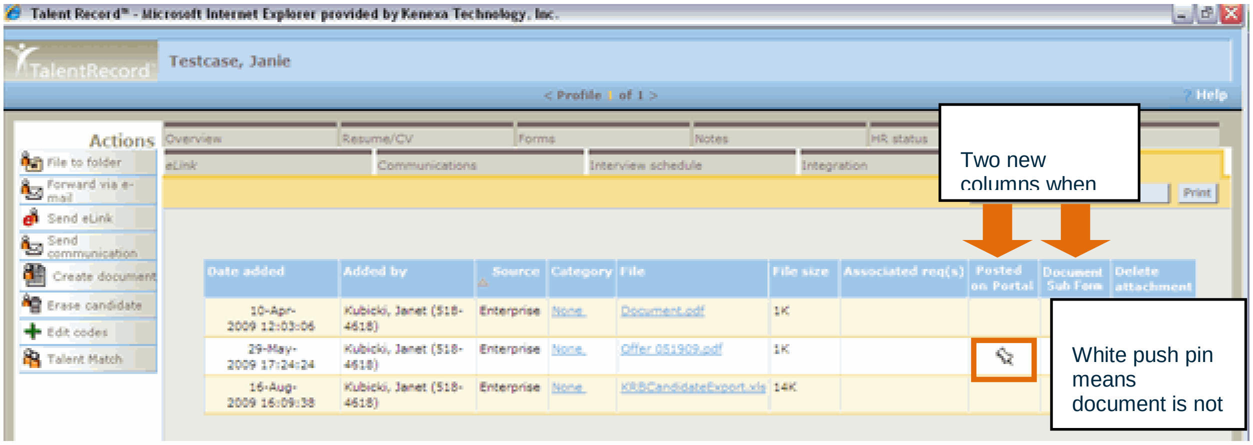


7. Click **Preview** to see a view of how it will look to the candidate.
8. Click **Save as PDF**. The document is saved to the **Attachment** tab on the Talent Record and is now ready to be posted. For information about posting the document, continue to the next section.

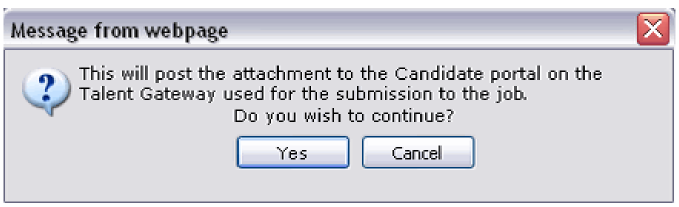
Posting Documents to the Candidate Portal

To post the document to the Candidate Portal:

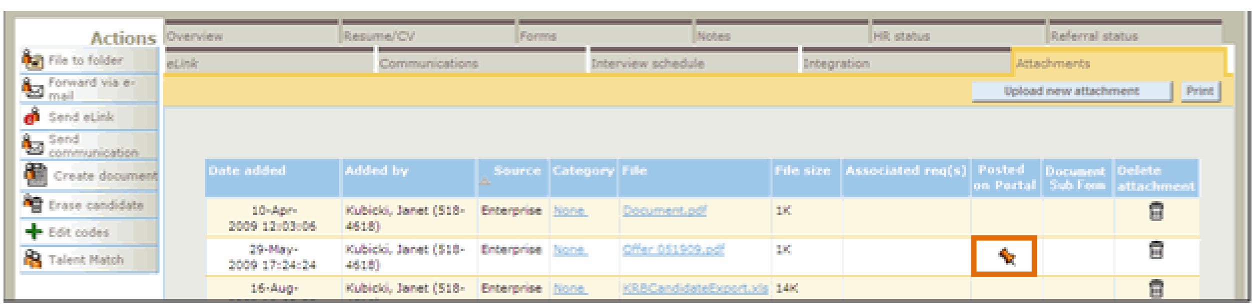
1. Navigate to the **Attachments** tab of the candidate's Talent Record. When the **Candidate Portal** is enabled, there are two additional columns on the Attachments grid: **Posted on Portal** and **Document Sub Form**.



2. Once the document is saved, the [new] **Posted on Portal** column displays a white push pin. A white push pin means the document is not yet posted. (When the document is posted the push pin is orange.)
3. Click the white push pin to post the document. 2x BrassRing displays the message below. Click **Yes** to continue.



4. Once you click **Yes**, the offer document (which is a PDF file) is posted to the Candidate Portal. The push pin turns orange (which always means "posted"). Note: To unpost the document, click the orange push pin.

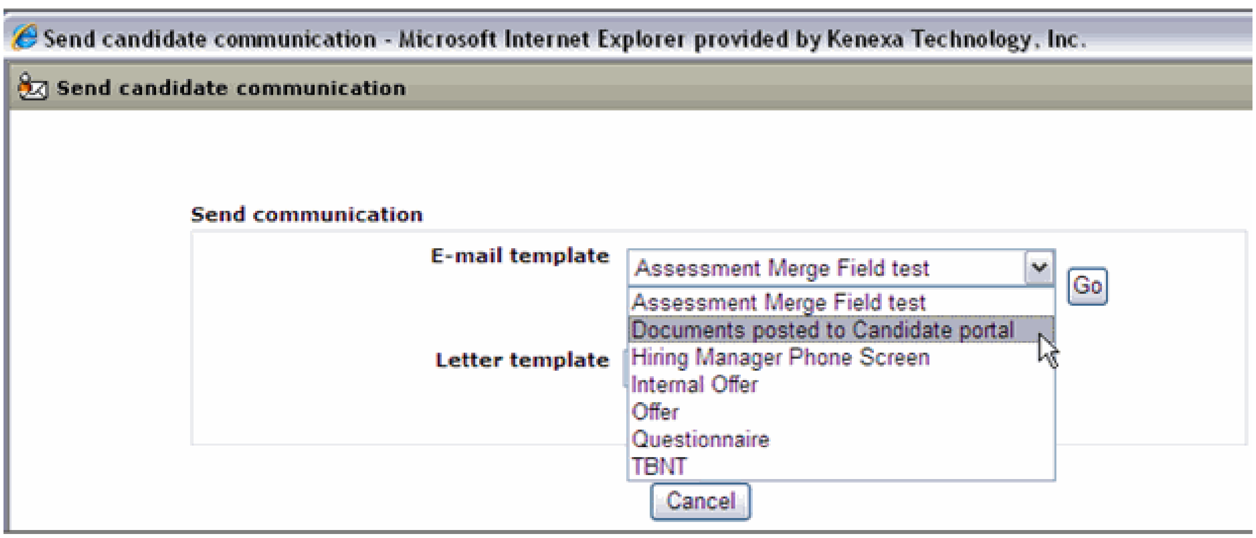


5. The posted (or unposted) information is added to the **Communications** tab on the candidate's Talent Record.
6. Repeat this procedure as necessary to post other documents (for example, relocation documents) to the Candidate Portal.

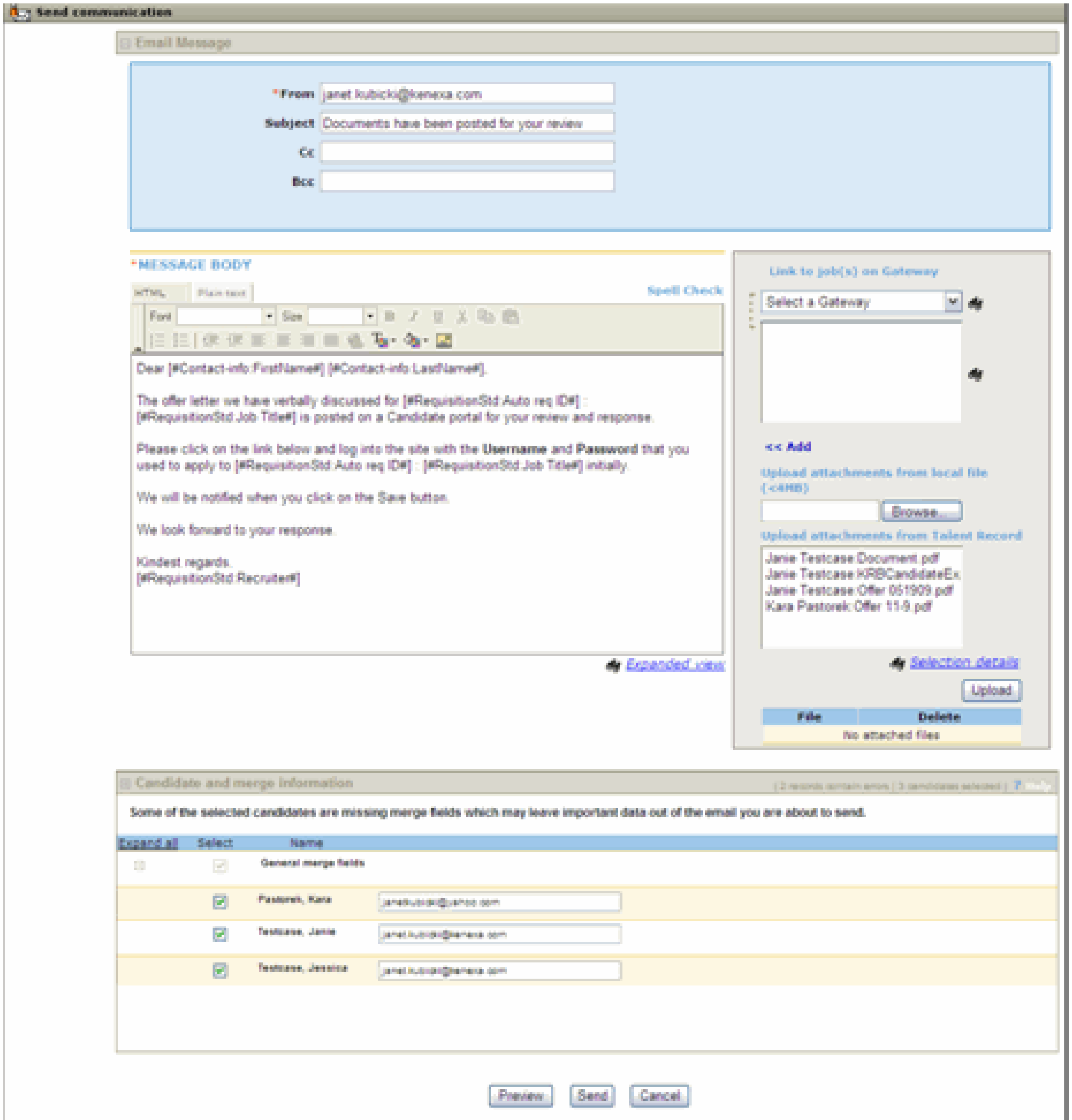
Creating and Sending the Offer E-mail

When you are ready to send the Offer e-mail, navigate to the Req folder and select the candidate(s) to whom you are extending the offer and click **Send communication** in the **Actions** menu.

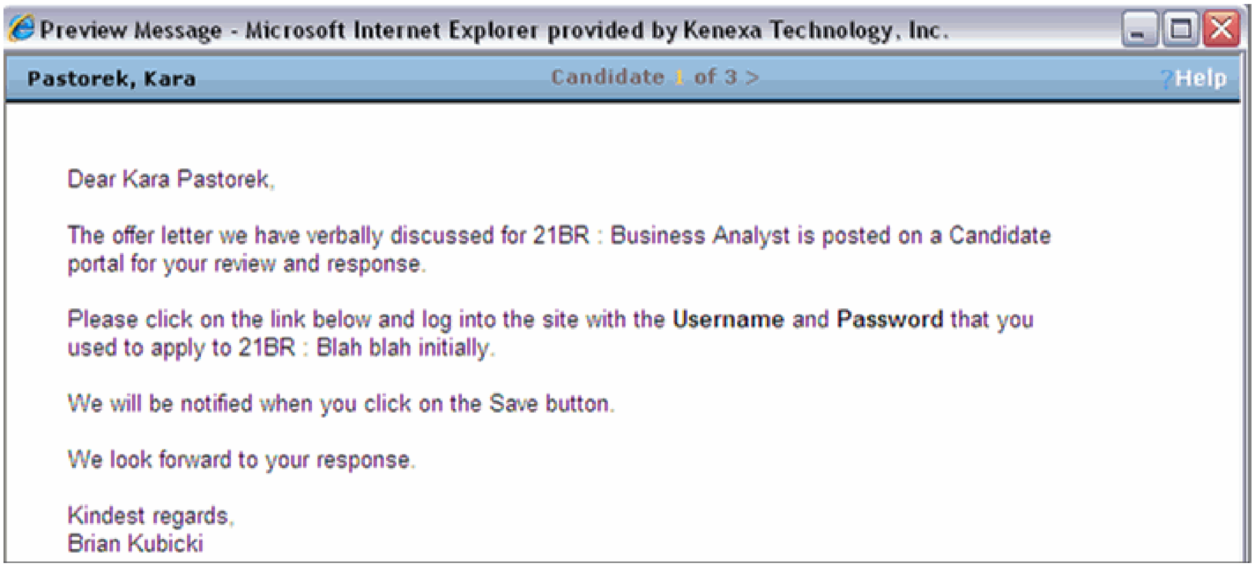
Select the e-mail template to be used for the e-mail communication to the candidate that accompanies the offer letter.



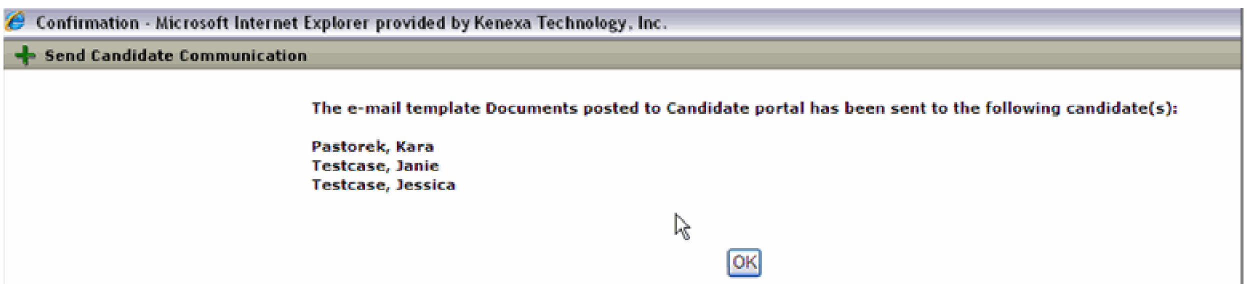
Edit the e-mail message. Note: There is a new “Candidate portal” merge token for e-mail templates (visible only if the Candidate portal client setting is enabled).



Preview the Offer e-mail.



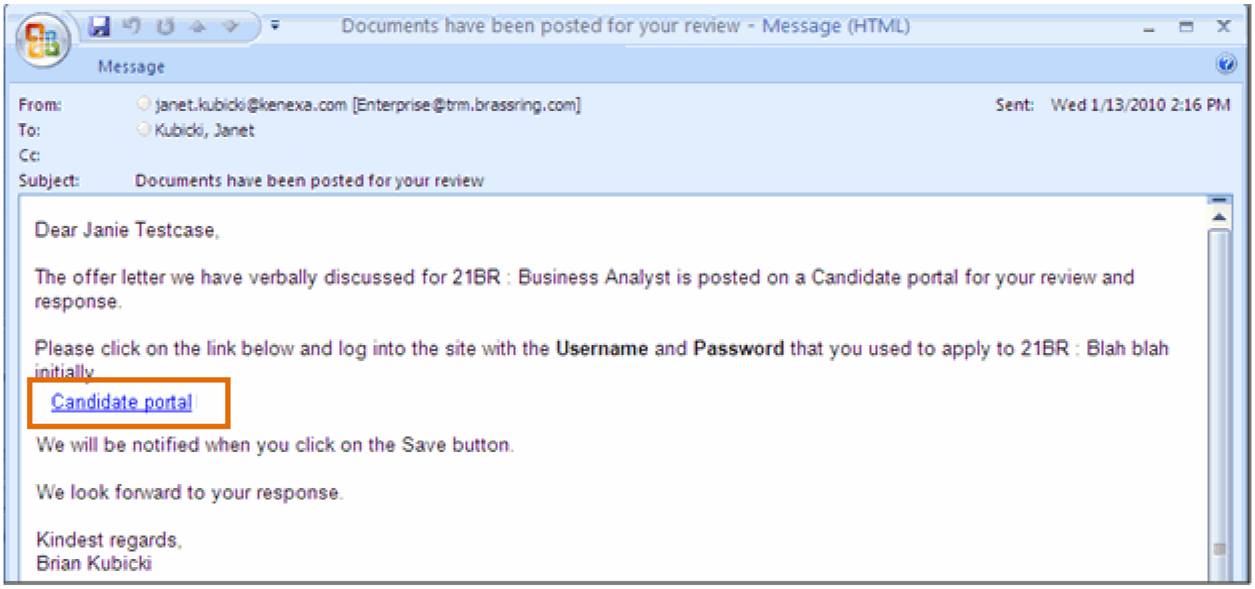
Send the Offer e-mail. A message confirms that the Offer e-mail was sent to the selected recipient(s).



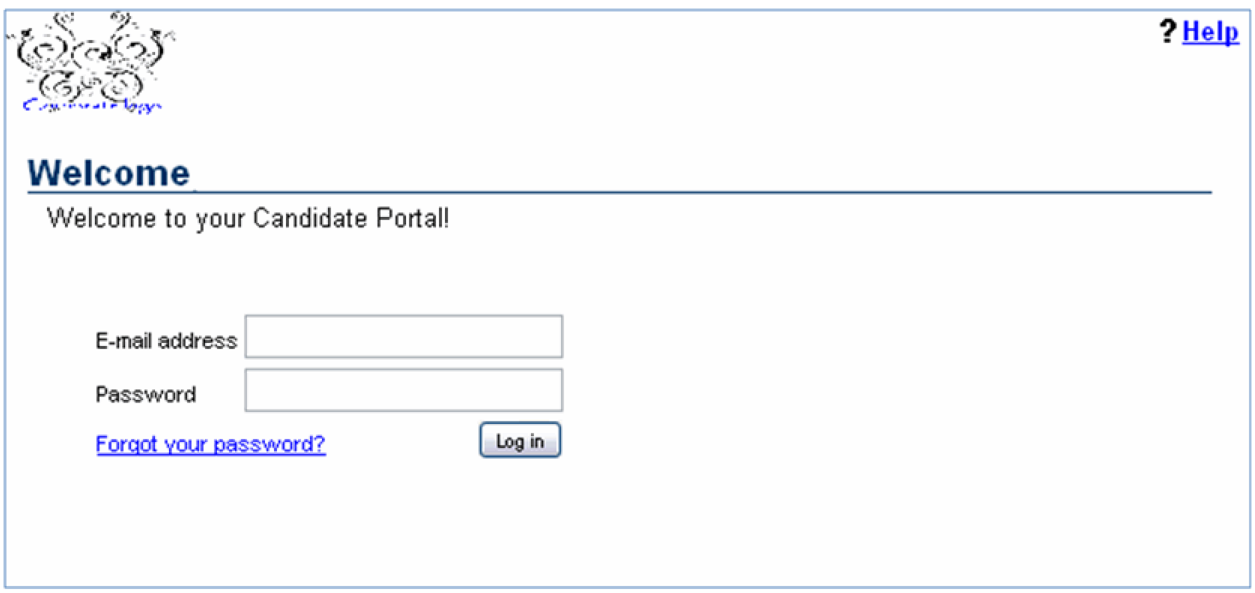
The next section describes the candidate's experience.

Candidate Experience

The candidate opens the e-mail and clicks on the Candidate Portal link.



The **Candidate Portal** login screen displays.



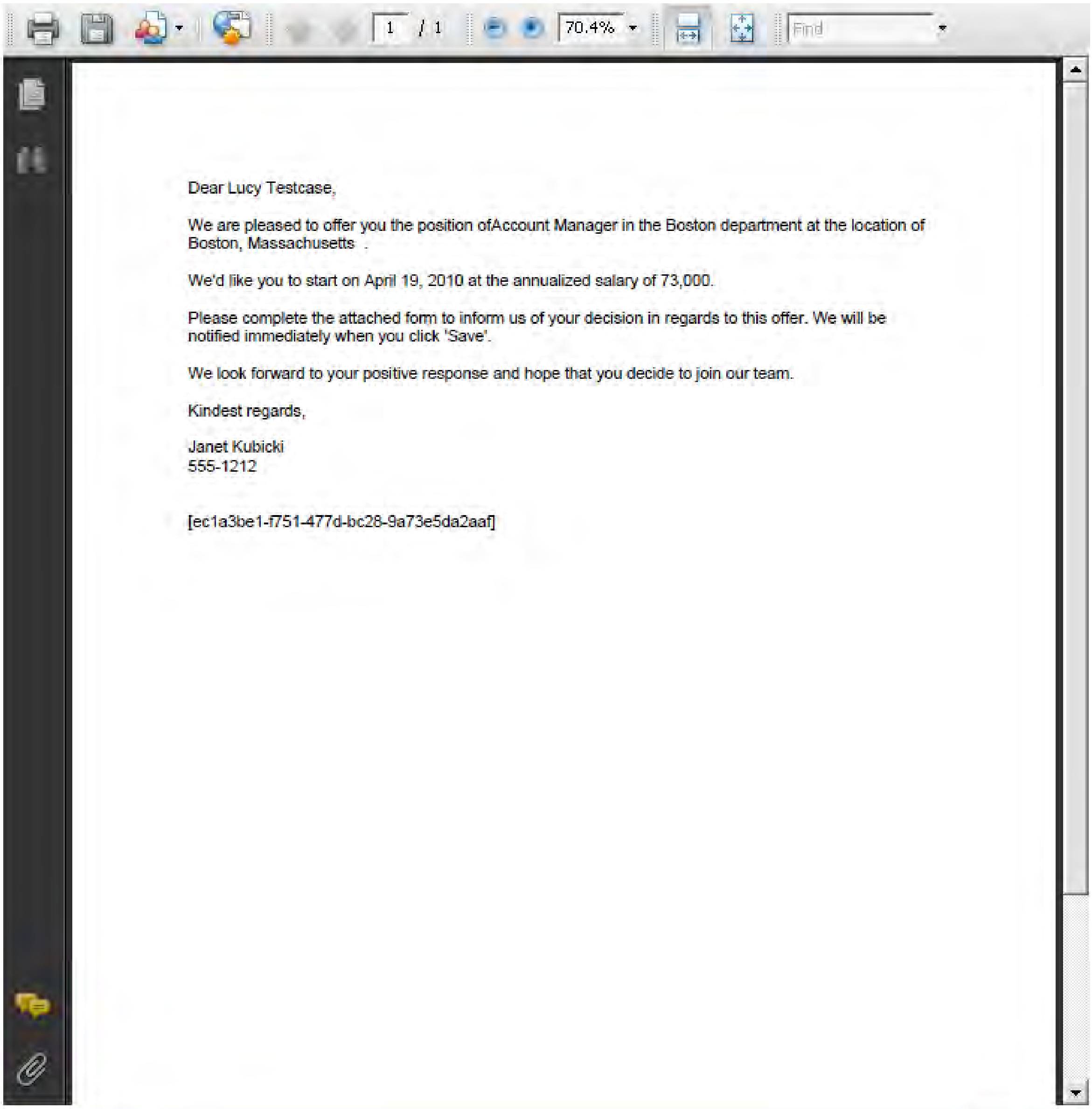
The candidate logs in to the Candidate Portal Talent Gateway with the username and password that he or she used to apply to the job. The system must authenticate the candidate's identity to take the user to the right link on the Candidate Portal.

The Candidate Portal after-login "welcome" page displays.

- This page includes some configurable elements. It can also include a progress bar that can take the candidate back to the Talent Gateway.
- The links shown will be ALL the documents that are currently posted on the Candidate portal (with orange push pins).

In the normal workflow, the candidate clicks the document link. The document opens in a separate window.

The candidate reviews the offer letter (or other document). If the document is very long, the candidate can scroll through it. Documents on the Candidate Portal cannot be edited.



Dear Lucy Testcase,

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

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

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

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

Kindest regards,

Janet Kubicki
555-1212

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

? Help

Powered by Kenexa eLink

Professional Offer - Response - Testcase, Lucy

First name Lucy

Last name Testcase

***Offer Response** ◯ Accept ◯ Decline

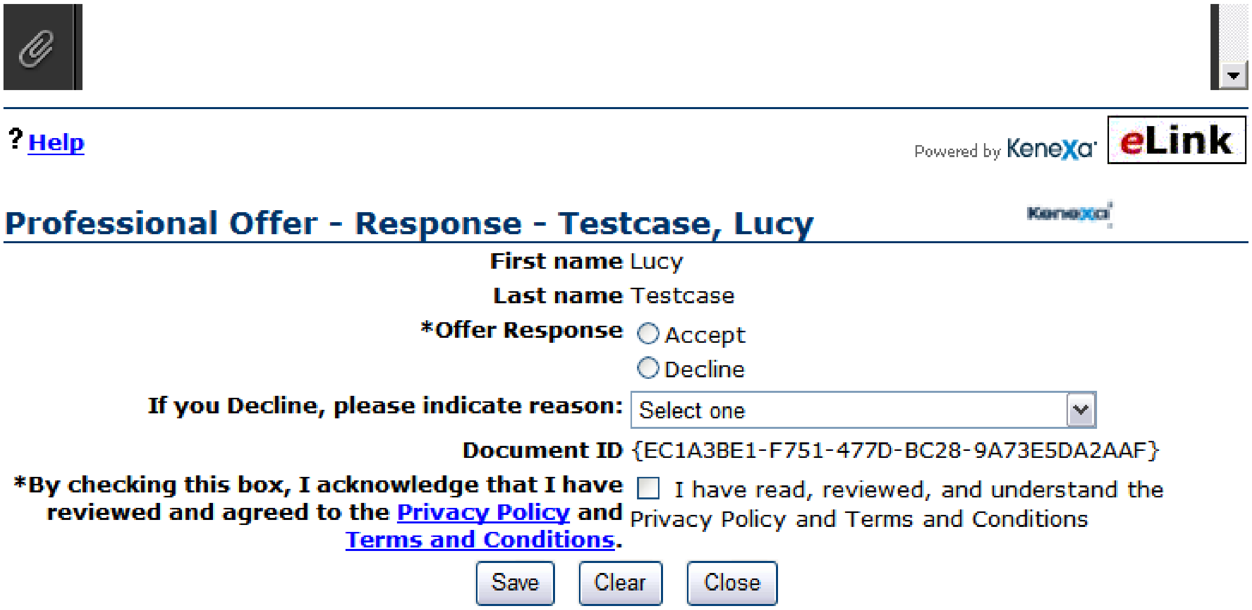
If you Decline, please indicate reason: Select one

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

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

Save Clear Close

The response form is visible below the offer document. The candidate must complete it and save it.



When the candidate clicks **Save**, the **Document subsidiary form** is created. The candidate can click on the link to view it but cannot edit it or remove it. If configured, an email is sent to the user(s) selected in the 'Notify users upon form creation' setting of the Document subsidiary form.

Document Subsidiary Form Business Rules

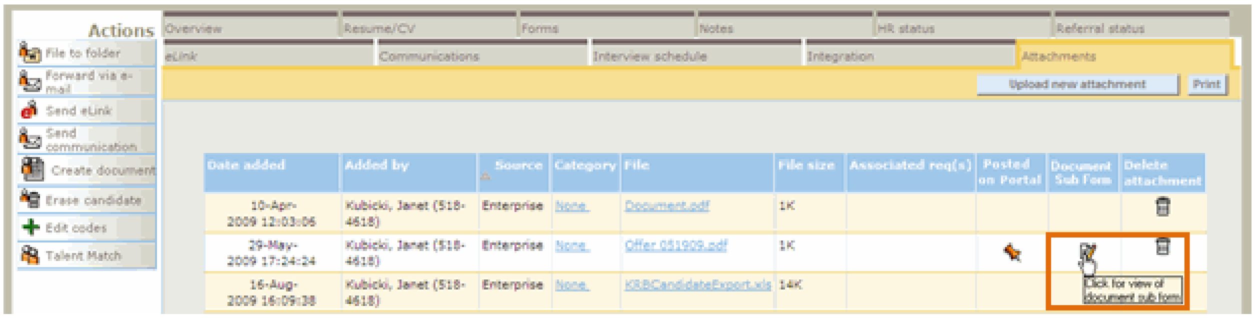
The document subsidiary form can be created only by this action on the Candidate Portal. It cannot be created in 2x BrassRing by a 2xB user.

The offer response is technically a "document subsidiary form." This form has a 1:1 relationship with a document. As a result, if the candidate declines this offer letter for this requisition, the document subsidiary form records the declination, (possibly) the reason, and the date.

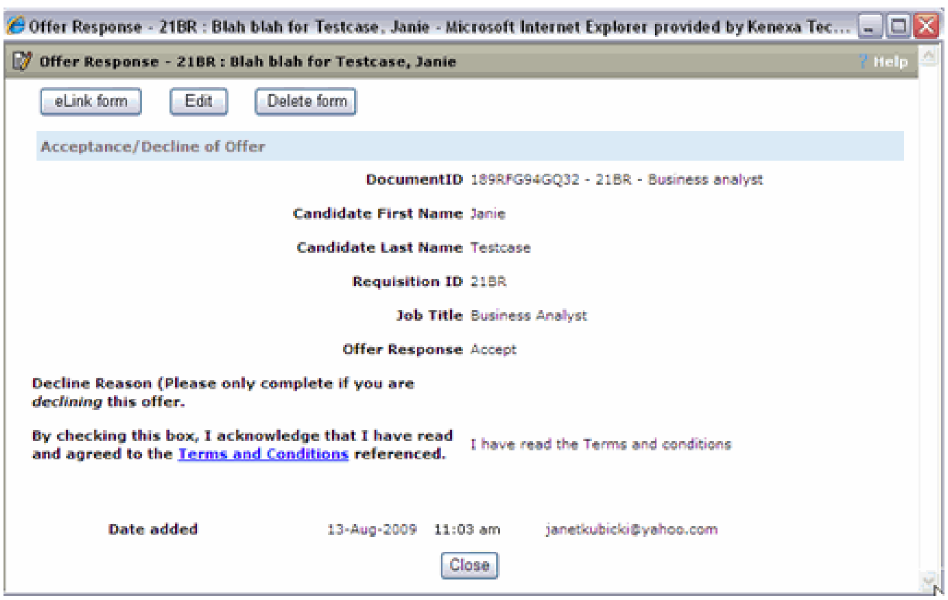
Document subsidiary forms are configurable (like the Req subsidiary form or a candidate form). The Document subsidiary form template to be used with the offer document is identified in the document template. See the configuration section for more information.

Recruiter's Experience when Document Saved on Candidate Portal

Back in 2x BrassRing, on the **Attachments** tab of the Candidate's Talent Record, an icon appears in the **Document Sub Form** column for the offer letter, indicating that the document is available for action by the Recruiter.



Any user with "view all" or "modify all" or "delete all" access to Document subsidiary forms can see the icon. Click the icon to view the document subsidiary form.



If you have the requisite privileges, you will see the Edit and/or Delete form icons. Users with View all access can see the eLink icon.

Your organization can configure access to these actions to work for your business process.

Configurable Candidate Stacking Field

Your organization can configure several attributes of the **Candidate stacking field** that were previously not configurable. The newly configurable attributes are the field **Type**, the **Data length**, **Encrypted**, **Hide in 2x BrassRing for these user types**, and **Hide in 2x BrassRing for these UI locales**.

With this enhancement, customers can use the Candidate stacking field to gather United States Social Security Numbers (SSNs). Kenexa Engineering has implemented this capability for 2x BrassRing and Talent Gateways. In addition, the field is available to be exported in the **Candidate Export** integration type.

To support the secure collection of the SSN in this manner, Kenexa made the following changes to the Candidate stacking field:

- The system enforces data entry for the Social Security Number.
- The field can be encrypted.
- The field can be hidden by user type or UI locale.

Quick Facts

Date Available	US: 11/Mar/2010 EU: 17/Mar/2010
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product or Module	☑ Workbench ☑ Workbench – Clients ☑ 2x BrassRing - New UI ☑ 2x BrassRing - Classic ☐ Talent Gateways ☑ Agency Manager ☐ Data Insight Tool ☐ SmartApproval ☐ Candidate Export
Visible Changes	☑ No – contact your CSC for implementation details. ☐ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☐ Specific conditions required – see details below. ☑ Configuration required – contact your Kenexa consultant for more information.

Benefits

Customers will be able to use the Candidate stacking field for sensitive information and be able to secure that sensitive information appropriately.

Feature Description

As a result of this enhancement, one thing your organization can do is configure the Social Security Number (SSN) field to be both encrypted but also visible to some 2xB user types but not others. The SSN can also be hidden for non-US locales, which do not use this identifier.

Once configured, users with the appropriate privileges can see the Social Security Number in several places in 2xB when the following conditions are met:

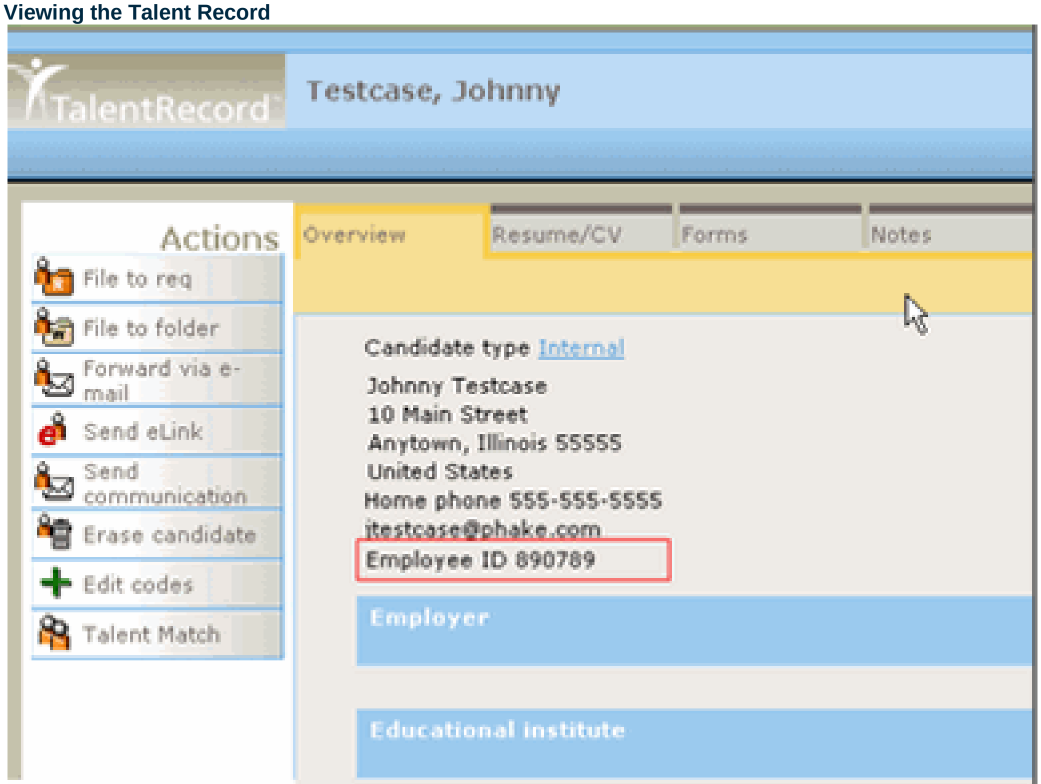
- The client setting **Enable candidate stacking field** is set to **Yes**.
- On the **Candidate stacking field** page, the user's user type is NOT selected to be hidden.
- On the **Candidate stacking field** page, the current UI locale is NOT selected to be hidden.

2x BrassRing users meeting the above conditions can see the SSN in the following locations:

- Viewing the **Overview** tab on the Talent Record
- Editing the **Overview** tab on the Talent Record. See the next section for more information.
- Viewing eLinked e-mails
- Viewing the **Stack duplicate candidates** page
- Viewing the Bulk print **Overview** window

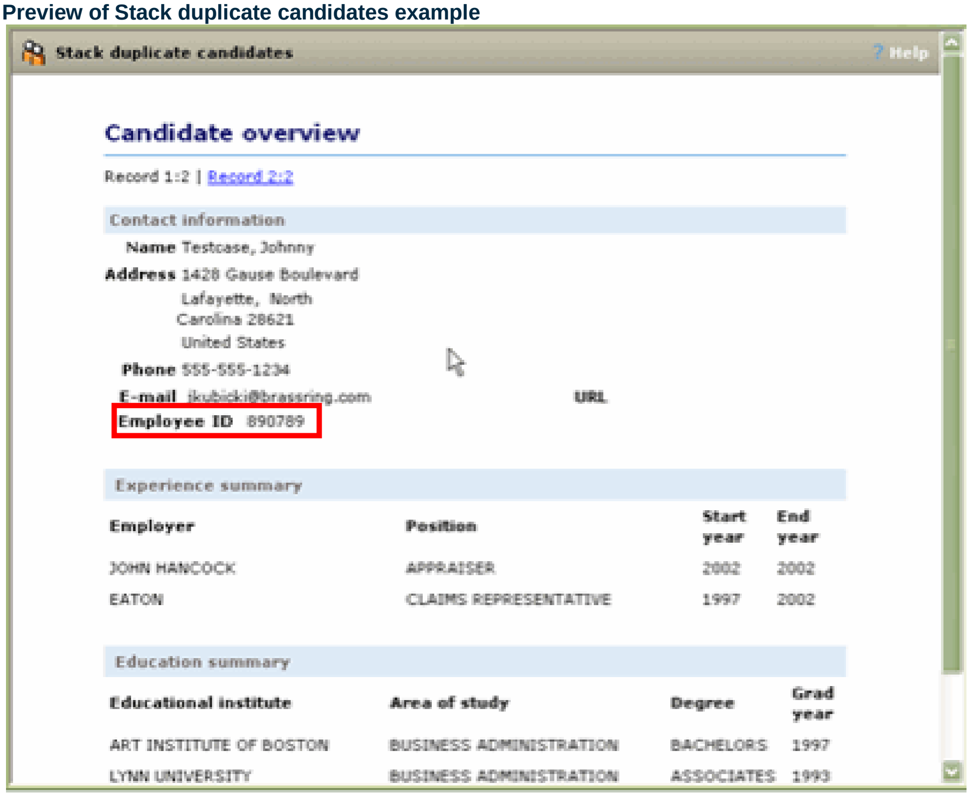
See the examples below.

Viewing the Talent Record

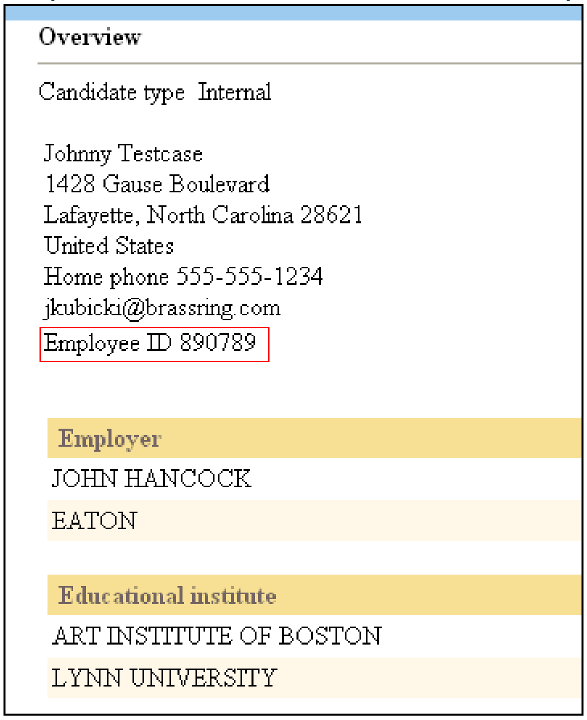


eLinked e-mail example

Preview of Stack duplicate candidates example



Bulk print overview with customized label for SSN example



Editing the Talent Record

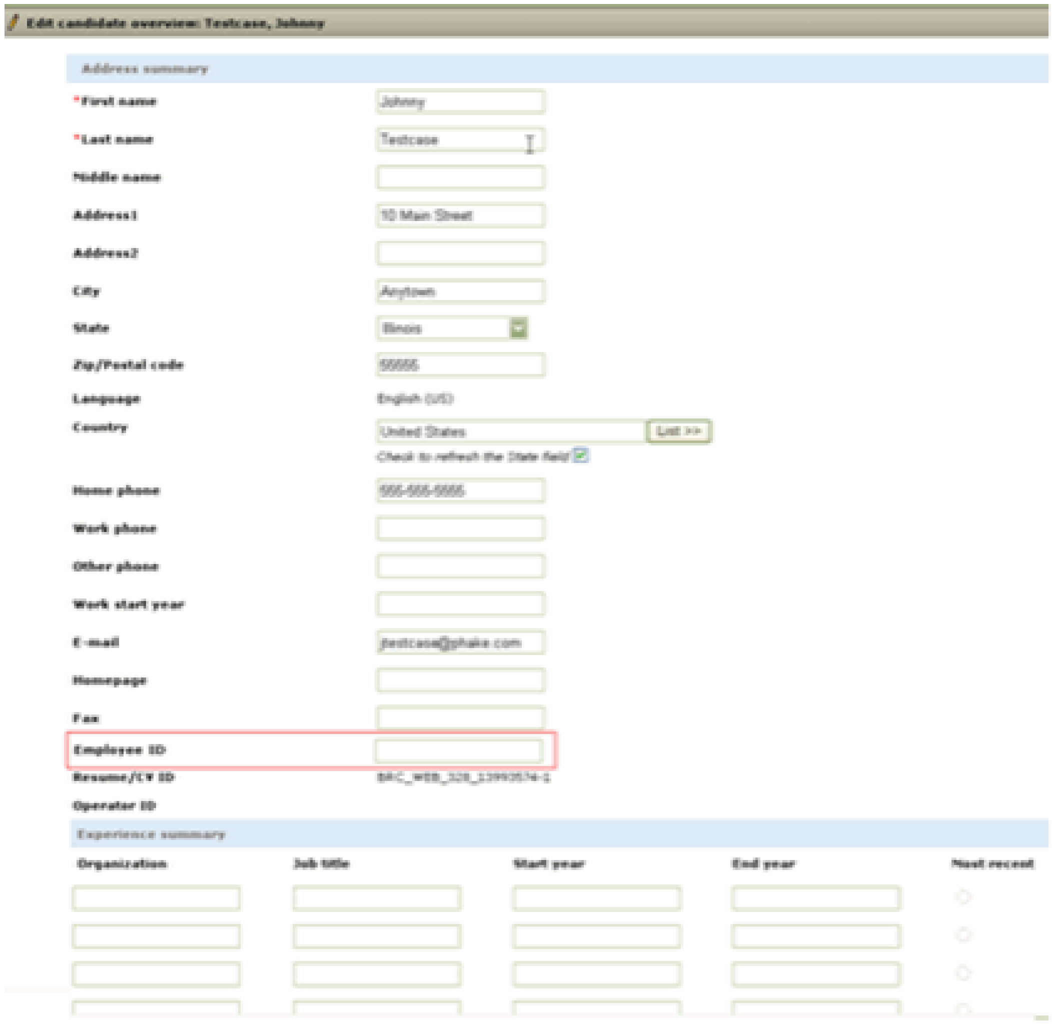
When users edit a candidate's data on the **Edit candidate overview** page, the system validates the following values against the settings for the Candidate stacking field attributes.

The business rules for each field type are:

- For fields of the Numeric type, you must enter integers (0, 1, 2…9).
- For fields of the Text type, you can enter most characters. You cannot enter angle brackets (< >), forward slash (/), and so forth.
- For fields of SSN type, you must enter a series of numbers and dashes in the following format: 111-11-1111.
- You must enter the exact number of characters selected for Data length.

If the entered data does not pass validation, 2xB displays the error message configured on the **Candidate stacking field page** in Workbench when you click **Save**.

Edit candidate overview example



Talent Gateway - Field validation

Validation of field will verify that the data enters meets the Type and Data length configured in Workbench (Workbench Tools > Settings > Fields > Candidate profile fields > Candidate stacking field > Type and/or Data length)

Present data validation error message (configured in Workbench in Tools > Settings > Fields > Customize candidate profile fields > Candidate stacking field (edit attributes)) for field when KRB user clicks on the 'Save' button if data entered does not meet field data validation rules:

The business rules for each field type are:

- For fields of the Numeric type, you must enter integers (0, 1, 2…9).
- For fields of the Text type, you can enter most characters. You cannot enter angle brackets (< >), forward slash (/), and so forth.
- For fields of SSN type, you must enter a series of numbers and dashes in the following format: 111-11-1111.
- You must enter the exact number of characters selected for Data length.

The show/hide attribute of the **Candidate stacking field** on a Talent Gateway is controlled by the settings on the **Contact fields and stacking logic** screen, accessed from the **Talent Gateway details** page.

The settings for **Hide in 2x BrassRing for these user types** and **Hide in 2x BrassRing for these languages** do not affect the presence of the field on the Talent Gateway.

How Do Clients Get this Feature?

This feature is controlled by a client setting and additional Workbench configuration. Please contact your Kenexa consultant for more information about enabling this feature.

Communications: Single-line or 2-line Merge Tokens for Address Fields

A new merge token allows the display of the Address 1 and 2 fields on 2 lines (when the candidate Address 2 field is populated) on blurbs and letter, email, and document templates.

Date Available	US: 22/APR/2010 EU: 28/APR/2010
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☑ 2x BrassRing Classic
Visible Changes	☐ No – contact your CSC for implementation details. ☑ Yes – see the cumulative Visible Changes document sent out for each build in the release.
How Do I Get this Feature?	☑ Automatic – see details below. ☐ Specific conditions required – see details below. ☐ Configuration required – see details below.

Benefits

Provides more flexibility in address formatting.

Feature Description

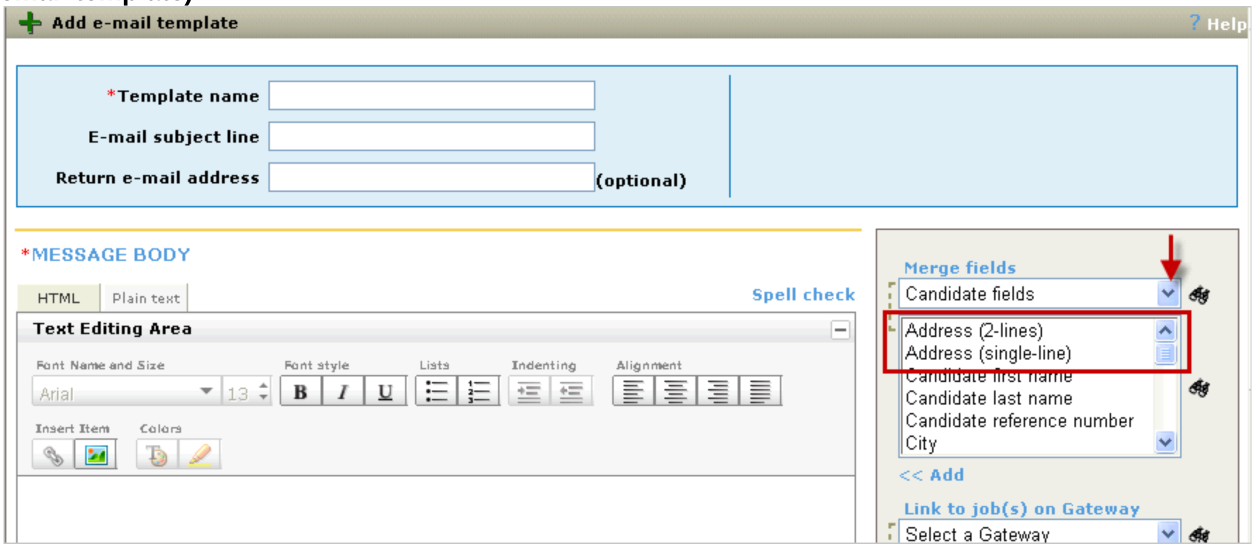
Previously, only one address merge token was available in the merge field lists, called **Address**. The 'Address' merge token merged the data from the Candidate profile/overview fields of Address 1 and Address 2 onto a single line in the communication, with a space between (if Address 2 was populated). Now users have two options for how Address 1 and Address 2 are merged:

- The new merge token, **Address (2 lines)**, takes data from the Candidate profile/overview fields of Address 1 and Address 2 and merges them with a line break between so that they appear on 2 lines in the communication. If no value is in Address 2, no line break or 2nd line is merged (so no extraneous space is added in the communication).
- The existing **Address** merge token has been renamed **Address (single line)**. The behavior has not changed: **Address (single line)** takes data from the Candidate profile/overview fields of Address 1 and Address 2 and merges them, with a space between, onto a single line in the communication.

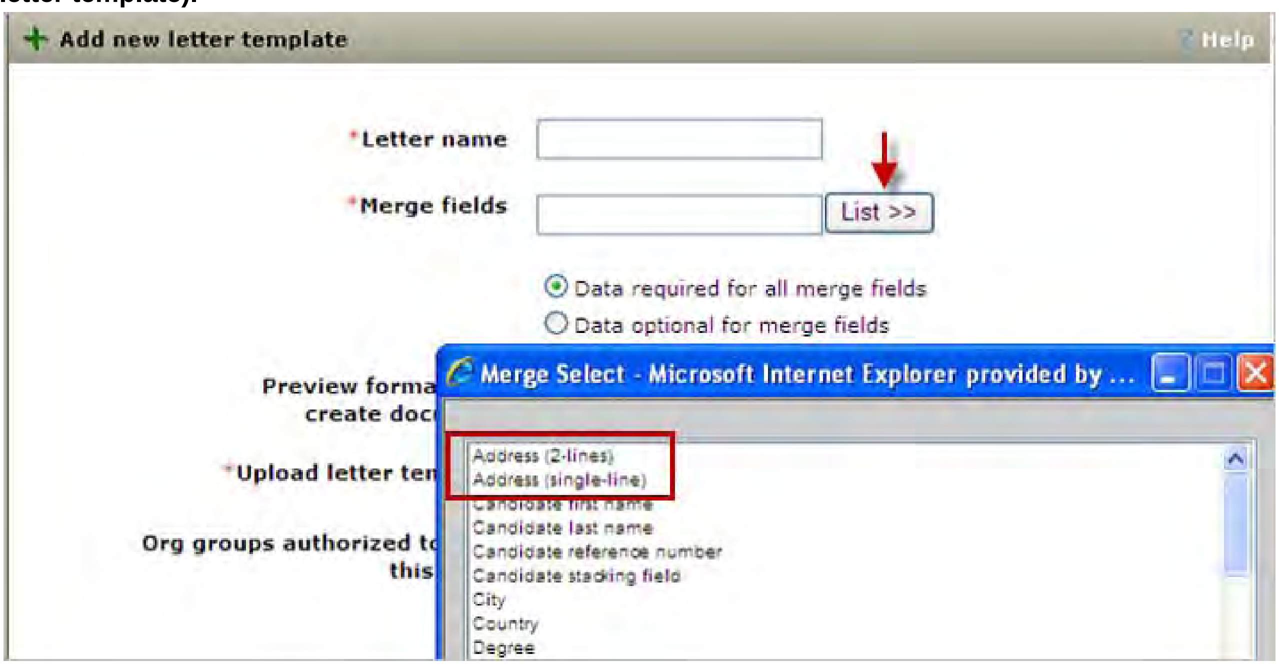
Note: there is NO change to existing letter token #Contact-Info:Address# or existing email/document/blurb token #Contact-Info:Address1#

2XB administrators with privileges to view the list of merge fields will automatically see the renamed and new merge tokens listed alphabetically in the list for the **Candidate fields** variable group on the Merge fields selection lists in 2XB for these actions:

- Adding or editing email templates (via **Admin -> Communications -> Add email template** and **Edit email template)**



- Adding or editing document templates (via **Admin -> Communications -> Add document template** and **Edit document template).** The Merge fields selector box is the same as above.
- Adding or editing blurbs (via **Admin -> Communications -> Add blurb** and **Edit blurb**). The Merge fields selector box is the same as above.
- Adding or editing letter templates (via **Admin -> Communications -> Add letter template** and **Edit letter template).**



How Do Clients Get this Feature?

This feature is available automatically without configuration.

Communications: Candidate stacking field Merge Token

A new merge token for Candidate communications allows the display of a custom “Candidate stacking field” on blurbs and letter, email, and document templates.

Date Available	US: 22/APR/2010 EU: 28/APR/2010
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☐ Workbench Self-Service ☐ New UI ☑ 2x BrassRing ☐ Talent Gateways ☐ Agency Manager ☐ Data Insight Tool ☐ SmartApproval
Visible Changes	☐ No – contact your CSC for implementation details. ☑ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☑ Automatic – see details below. ☐ Specific conditions required – see details below. ☐ Configuration required – see details below.

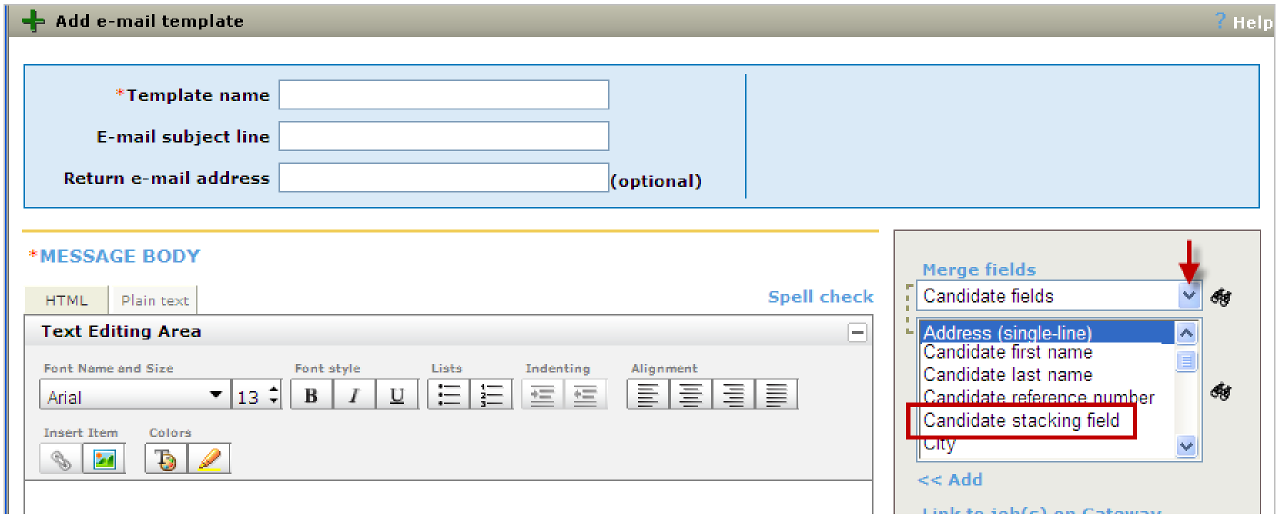
Benefits

Provides more flexibility.

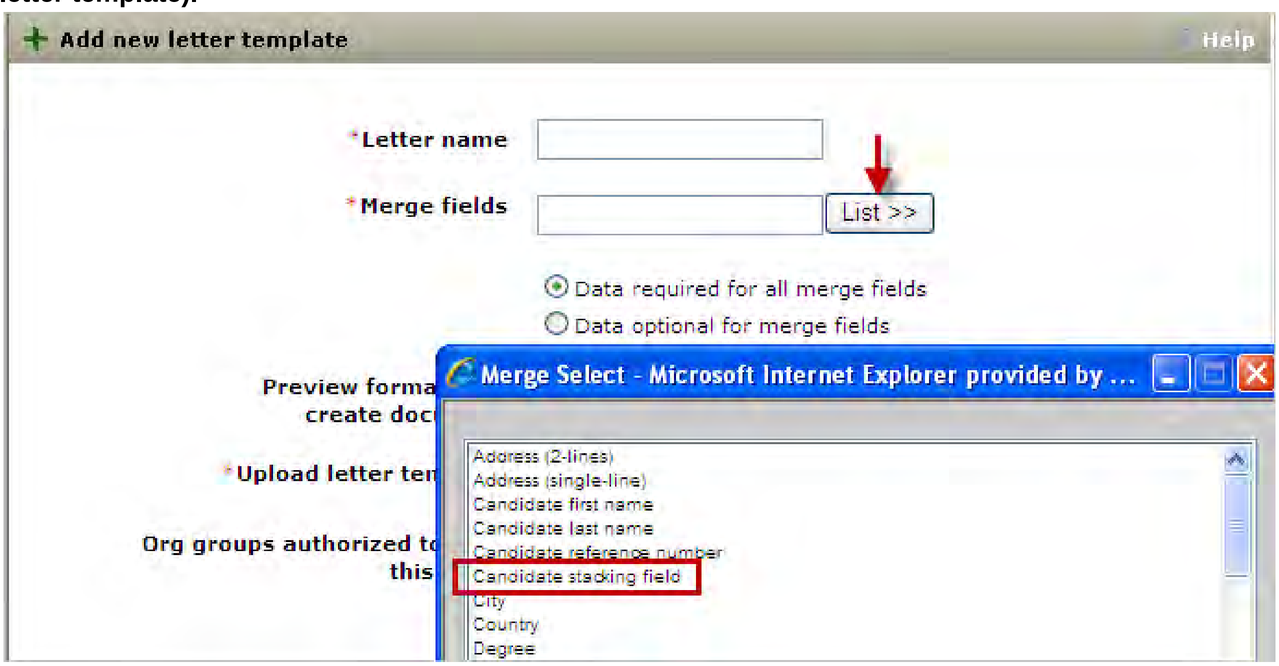
Feature Description

For organizations with the candidate stacking field client setting enabled , the Custom Stacking field will automatically appear in the list of merge fields for those 2xB administrators with privileges to view it. The field will be listed alphabetically in the **Candidate fields** variable group on the Merge fields selection lists in 2xB for these actions:

- Adding or editing email templates (via **Admin -> Communications -> Add email template** and **Edit email template)**



- Adding or editing document templates (via **Admin -> Communications -> Add document template** and **Edit document template).** The Merge fields selector box is the same as above.
- Adding or editing blurbs (via **Admin -> Communications -> Add blurb** and **Edit blurb**). The Merge fields selector box is the same as above.
- Adding or editing letter templates (via **Admin -> Communications -> Add letter template** and **Edit letter template).**



Note: User types for whom the Candidate stacking field is hidden will not see the merge token when adding a template, but it will appear when they edit a template to which it has been added. However, the merge token will not appear in the list of merge fields that they can add.

How Do Clients Get this Feature?

This feature is available automatically without configuration.

Communications – Language Selection for Letter Templates with Req Tokens

Users sending letters to candidates using a letter template with req tokens can now select the appropriate language from those created for the req.

Date Available	US: 01/APR/2010 EU: 07/APR/2010
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☐ Workbench Self-Service ☑ New UI ☑ 2x BrassRing ☐ Talent Gateways ☐ Agency Manager ☐ Data Insight Tool ☐ SmartApproval
Visible Changes	☐ No – contact your CSC for implementation details. ☑ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☑ Automatic – see details below. ☐ Specific conditions required – see details below. ☐ Configuration required – see details below.

Benefits

Recipients can now get a job ID as well as other related communication tokens sent to them in their preferred language.

Feature Description

For reqs created with multiple languages, 2xB users sending letters to candidates using a letter template with req tokens can now select an appropriate language from those available for the req.

Users select the language for their letters by following these summarized steps:

1. Select candidates from a candidate grid and the **Send Candidate Communication** action.
2. Select a letter template. The **Send communication** screen appears. If the template includes req tokens and the req has multiple languages, the screen includes a new single-select language box.

3. Select the req language appropriate for the candidate from the alphabetical list of languages for the req. The communication will use that language for any req tokens.
4. Populate any missing merge fields as required and continue, saving the letter for immediate generation or later batch processing.

Before this change, the **Send communication** screen displayed without the language-selection dropdown. When the latter was generated or sent, the language automatically used for any req tokens was the first language of the req (language the req was created in), regardless of candidate language.

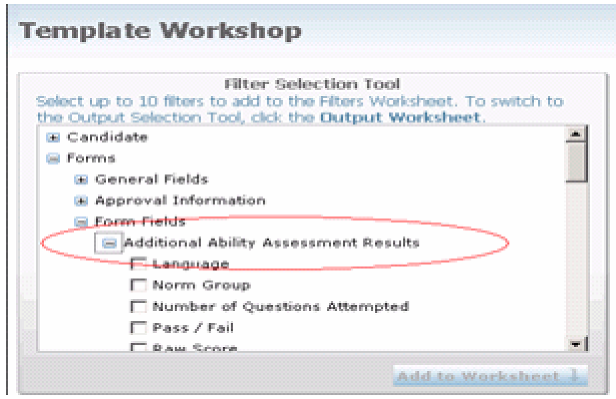
How Do Clients Get this Feature?

This feature is available automatically without configuration.

Data Insight Tool: Includes Document Subsidiary Forms

Customers can report on Document Subsidiary forms and form fields used in the new Candidate Portal pages for offer letter acceptance.

In both the **Filter Selection Tool** and **Output Field Selection Tool**, Document Subsidiary forms are stored under **Forms > Form fields > [Form Name]**. Individual form fields are listed for that form after the form name. See the feature writeup for *Candidate Portal Phase 1* for more information about Doc Sub forms.



Date Available	US: 18/FEB/2010 EU: 24/FEB/2010
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☑ Data Insight Tool
Visible Changes	☐ No – contact your CSC for implementation details. ☑ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☑ Automatic – see details below. ☐ Specific conditions required – see details below. ☐Configuration required – contact your CSC for details.

How Do Clients Get this Feature?

This feature is available automatically without configuration to customers who use the Data Insight Tool.

Data Insight Tool: Dynamic Filters

You can create and save dynamic templates that include filters but do not specify filter criteria. When you use a dynamic template, you are prompted to specify filter criteria at run time or when scheduling the template. For example, you might want to create a template that includes HR Status, but leave the statuses unspecified until you run the template. You can also use dynamic templates as the basis of template schedules. See the "*Data Insight Tool User Experience*" section below for more details.

Feature Summary Grid

Date Available	US: 11/MAR/2010 EU: 17/MAR/2010
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☐ Workbench Self-Service ☐ 2x BrassRing New UI ☐ 2x BrassRing ☐ Talent Gateways ☐ Agency Manager ☑ Data Insight Tool ☐ SmartApproval ☐ 2x Onboard
Visible Changes	☐ No – contact your CSC for implementation details. ☑ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☑ Automatic – see details below. ☐ Specific conditions required – see details below. ☐Configuration required – contact your CSC for details.

Benefits

Data Insight Tool users can efficiently use Dynamic Templates as the basis of many different templates that are similar. Users can run Ad Hoc reports more flexibly without having to set up the same criteria repeatedly.

Feature Description

Data Insight Tool users can create dynamic templates that include filters without specifying fixed filter criteria. When they are using a dynamic template, users are prompted to specify filter criteria at run time or when scheduling the template. For example, a user might want to create a template that includes some HR Status filters and specify the statuses on the fly when running the template.

Filters that do not have criteria specified are *dynamic filters*. Templates that include at least one dynamic filter are *dynamic templates*. In your template library, dynamic templates are annotated as **[Dynamic]** in the **Type** column.

Important: You must select at least one (1) output field before they can save a template with dynamic filters.

You can run dynamic templates in ad hoc jobs by clicking **Run Now**. When you click **Run Now**, you are asked to supply the filter criteria for the dynamic filters in the template before the ad hoc job will run.

You can run dynamic templates using the criteria of the last ad hoc job by clicking **Run Now (Last Run)**.
Note: You can click **Run Now (Last Run)** only if this dynamic template was run at least once previously.

Scheduling Dynamic Templates

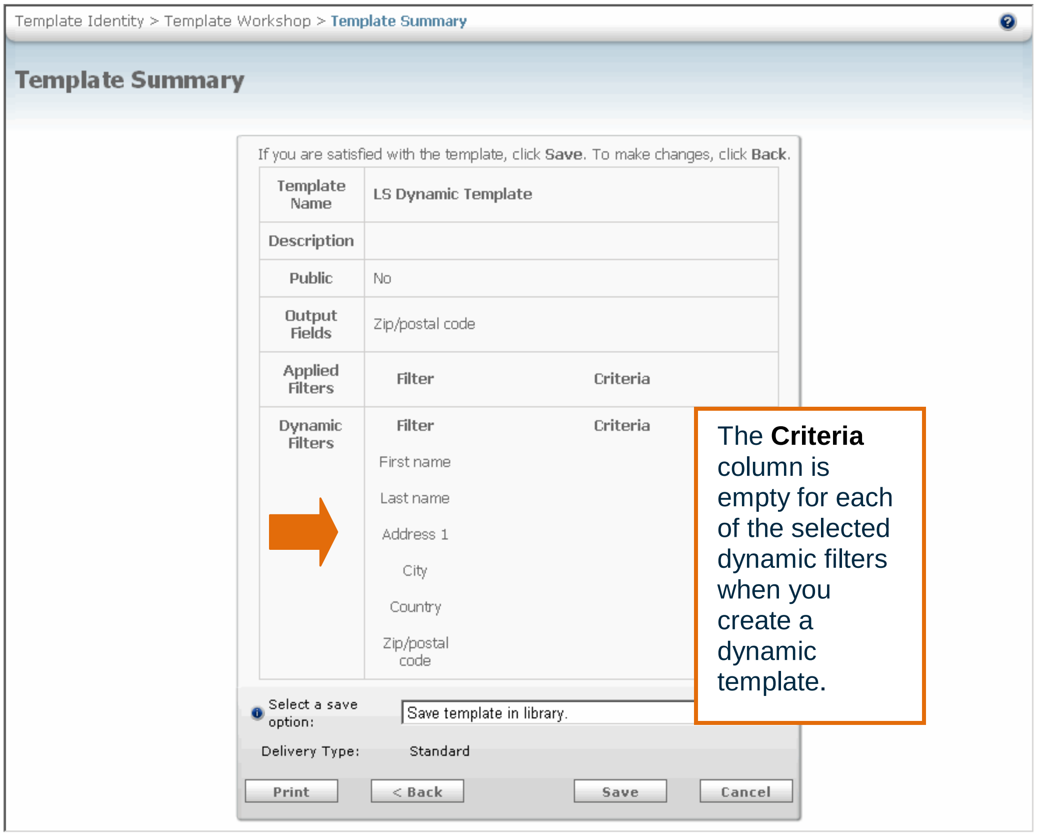
You can schedule a dynamic template to run, but you must specify the filter criteria for any dynamic filters included in the template at the time of creating the schedule.

You can schedule a dynamic template based on the last run by clicking **Schedule (Last Run)**. The Data Insight Tool uses the last run as the effective criteria for the dynamic filters. If a dynamic template has never been run, you cannot schedule it because no criteria have ever been selected for the dynamic filters. (You can solve this problem by immediately running it as an ad hoc job.)

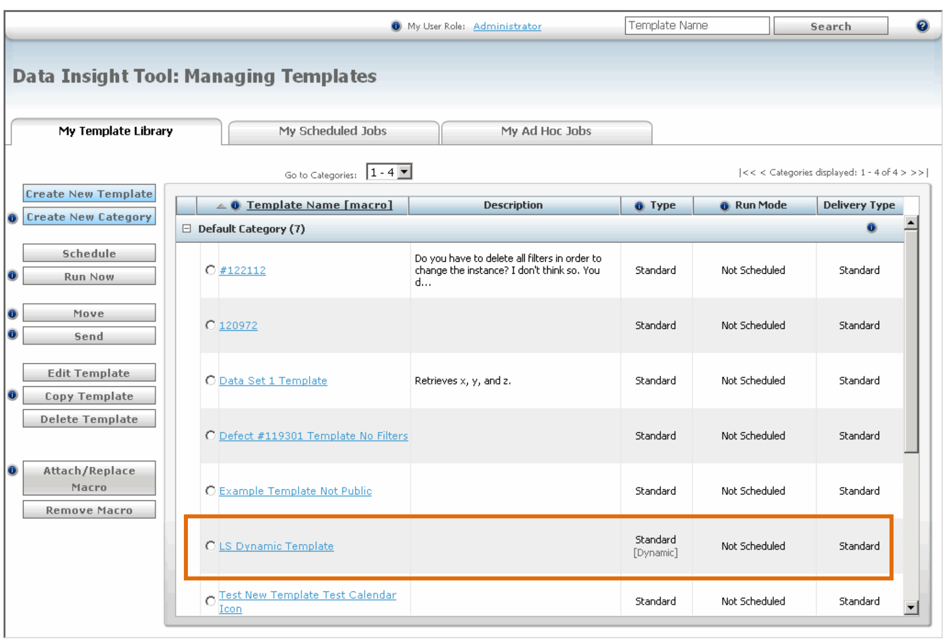
The dynamic filter functionality is persistent from session to session:

- Once you have saved a dynamic template, it is permanently saved to your template library.
- When you run a dynamic template, the Data Insight Tool handles the results the same way it handles all Ad Hoc and Scheduled Job results.
- When you schedule a dynamic template, the Data Insight Tool runs the template on schedule in the same way it runs any scheduled template.

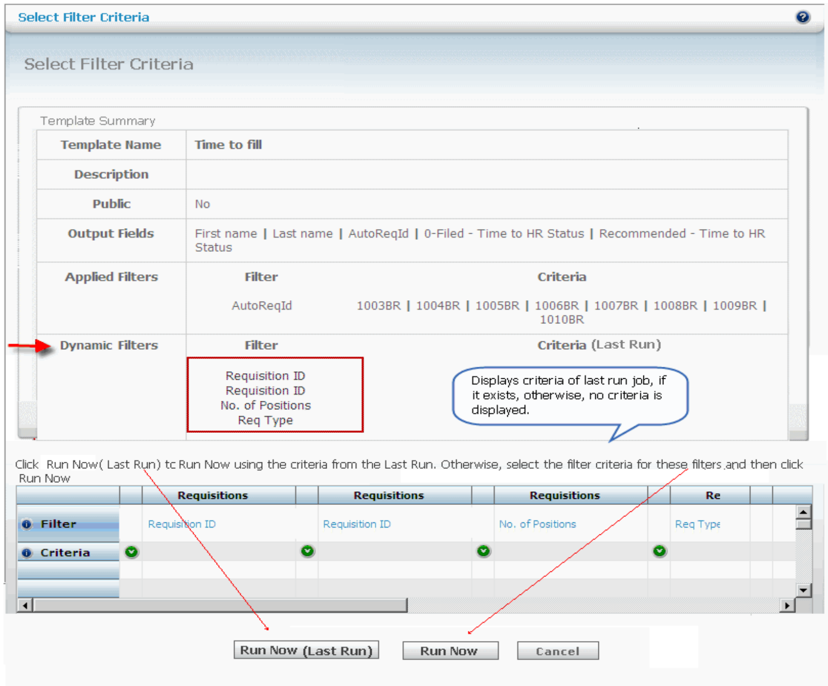
The **Template Summary** page displays the dynamic filters in a new **Dynamic Filters** section without criteria. Depending upon what is selected as in the save option dropdown list, the user will be presented with the “Select Filter Criteria” page.



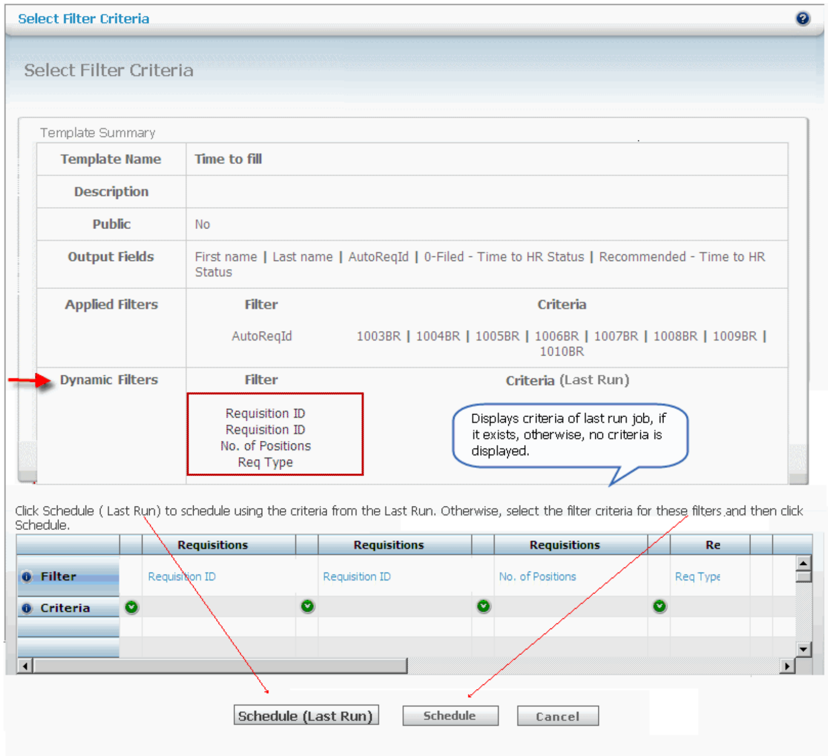
Dynamic templates are listed in the **Default Category** of the template library. The term **[Dynamic]** appears in the **Type** column, to indicate that the template contains at least 1 dynamic filter:



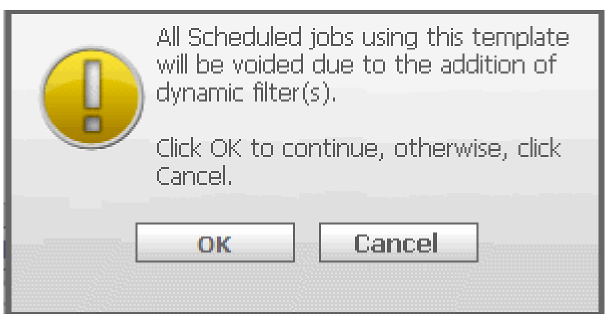
When user selects a template with a dynamic filter and clicks **Run Now**, the system prompts the user to select filter criteria. **Note:** If the template was previously run as Ad Hoc, the user has the option of running using the previous criteria or entering new criteria



When a user selects a template with a dynamic filter, and clicks **Schedule**, the system prompts the user to select filter criteria. **Note:** If the template was previously scheduled and completed, the user has the option of using the previous criteria or entering new criteria



Important! If a schedule is attached to a template, and the user edits the template, adding filters without criteria (dynamic filters), **all scheduled jobs are voided**.



How Do Clients Get this Feature?

This feature is available automatically without configuration to customers who use the Data Insight Tool.

Data Insight Tool User Experience

This section describes how to create a dynamic template, run an Ad Hoc job using a dynamic template, and schedule a dynamic template.

You might find dynamic templates useful in the following circumstances:

- If you want to specify filter criteria at the time of running the template (when you click **Run Now** to run an Ad Hoc job).
- If you use the same filters repeatedly but change the filter criteria, you can use the dynamic template as the basis of multiple ad hoc jobs or scheduled templates.

You can have a “mixed” template that includes both permanent filter criteria and dynamic filters. **Note:** When you are selecting dynamic filter criteria at run time, you cannot change permanent filter criteria. You can change permanent filter criteria by editing the template, but you can’t change them on the fly.

For Public templates, the regular (non-admin) users have access to the same criteria as admin users.

Creating a Template with Dynamic Filters

You can create dynamic templates by adding new templates or editing existing templates. When you include at least one filter in a template without specifying filter criteria, you have created a dynamic template. A filter with no filter criteria selected is a *dynamic filter*.

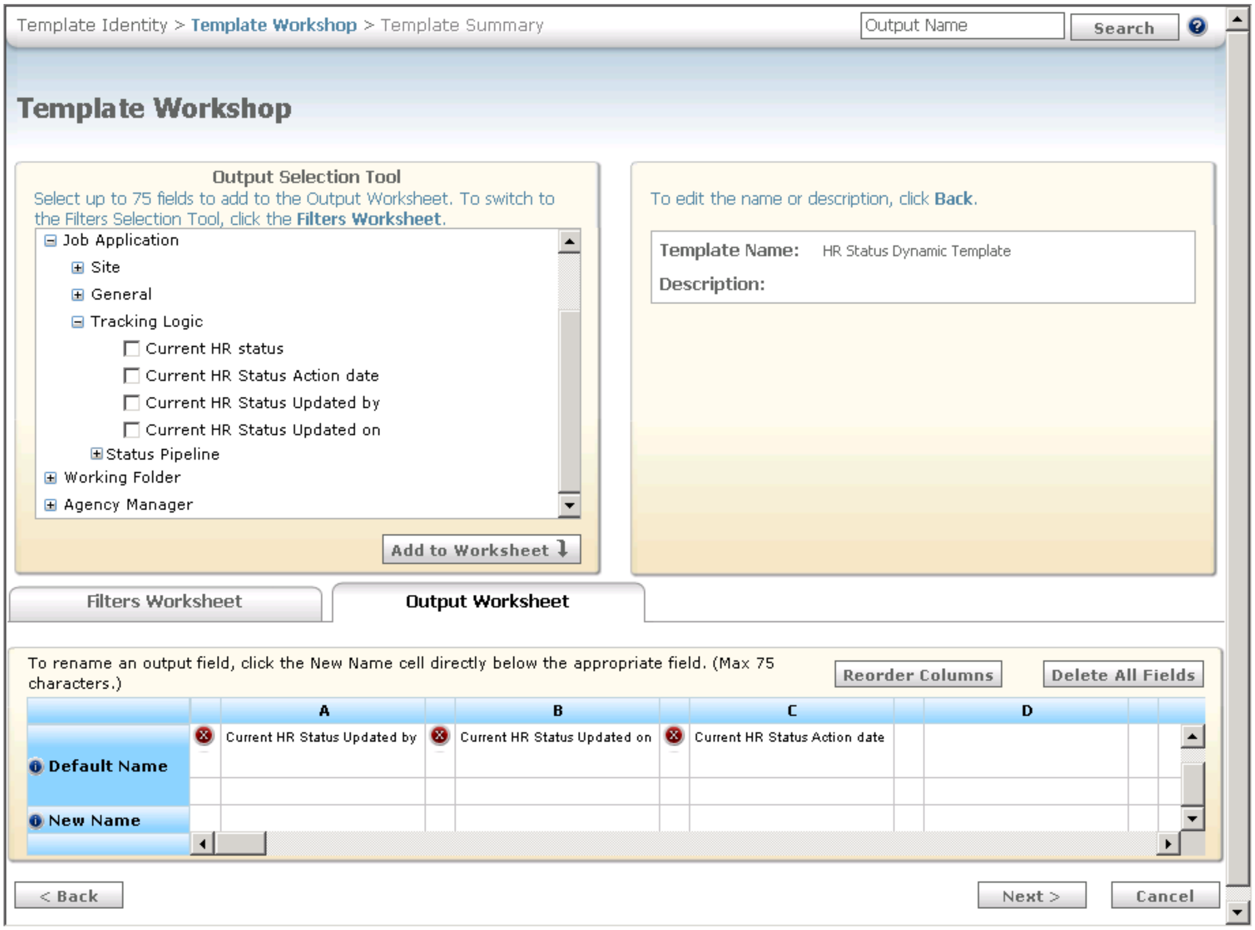
Before creating the template, decide which filter fields you want to include in the dynamic template without pre-specified criteria. For example, you might want to create a template that includes HR Status filters within the **Job Application > Tracking Logic** filter group as the dynamic filters along with other “fixed” filters.

To create a dynamic template:

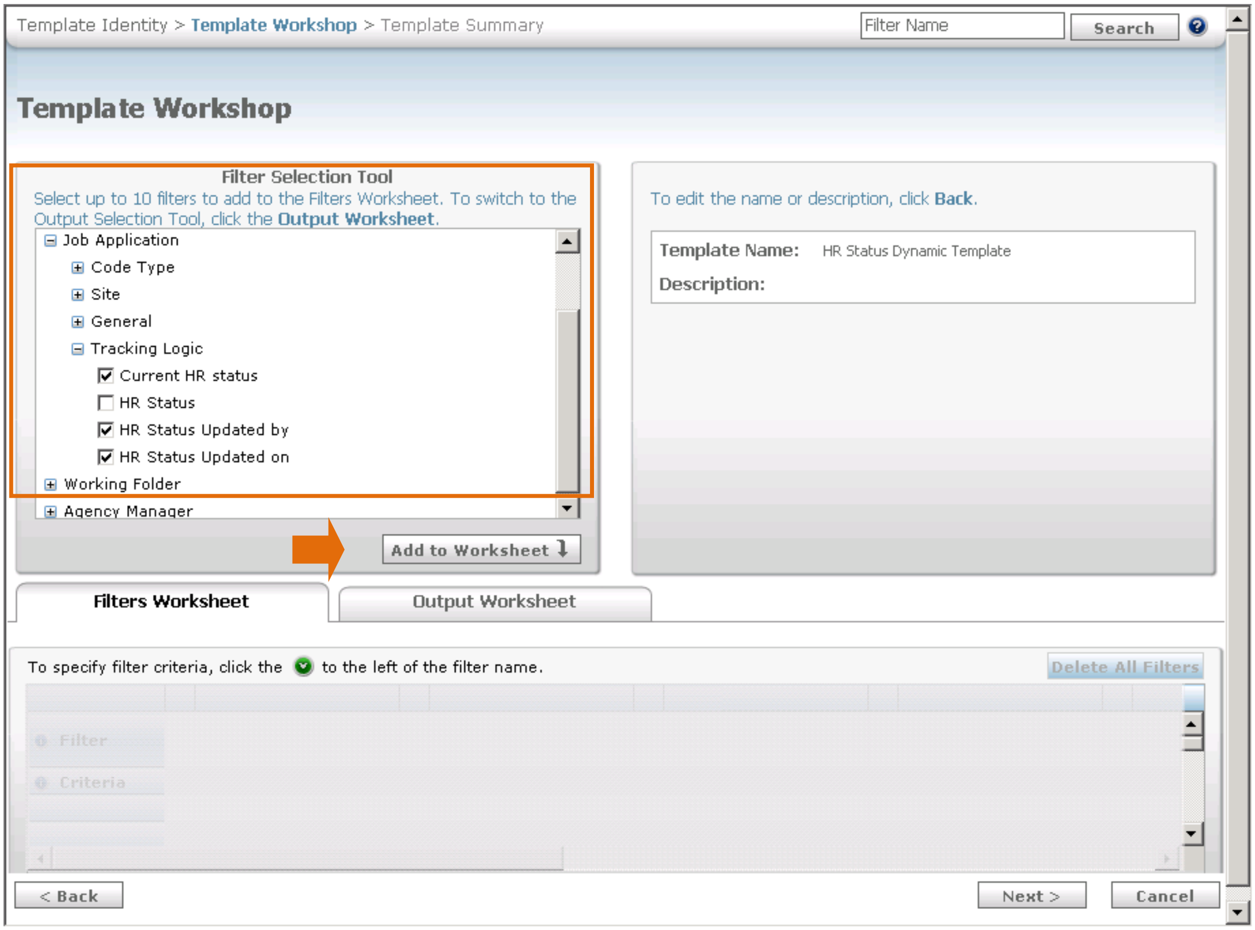
1. In 2x BrassRing, select **Reports > Data Insight Tool > Manage Templates**.
2. Click **Create New Template** OR select an existing template and click **Edit Template**.
3. Add or edit (if necessary) the template name (required) and a description (optional) and click **Next >**.
4. In the **Template Workshop**, click the **Output Worksheet** to display the **Output Selection Tool**.

   Important: You must add at least one output field to the template or you cannot save it.

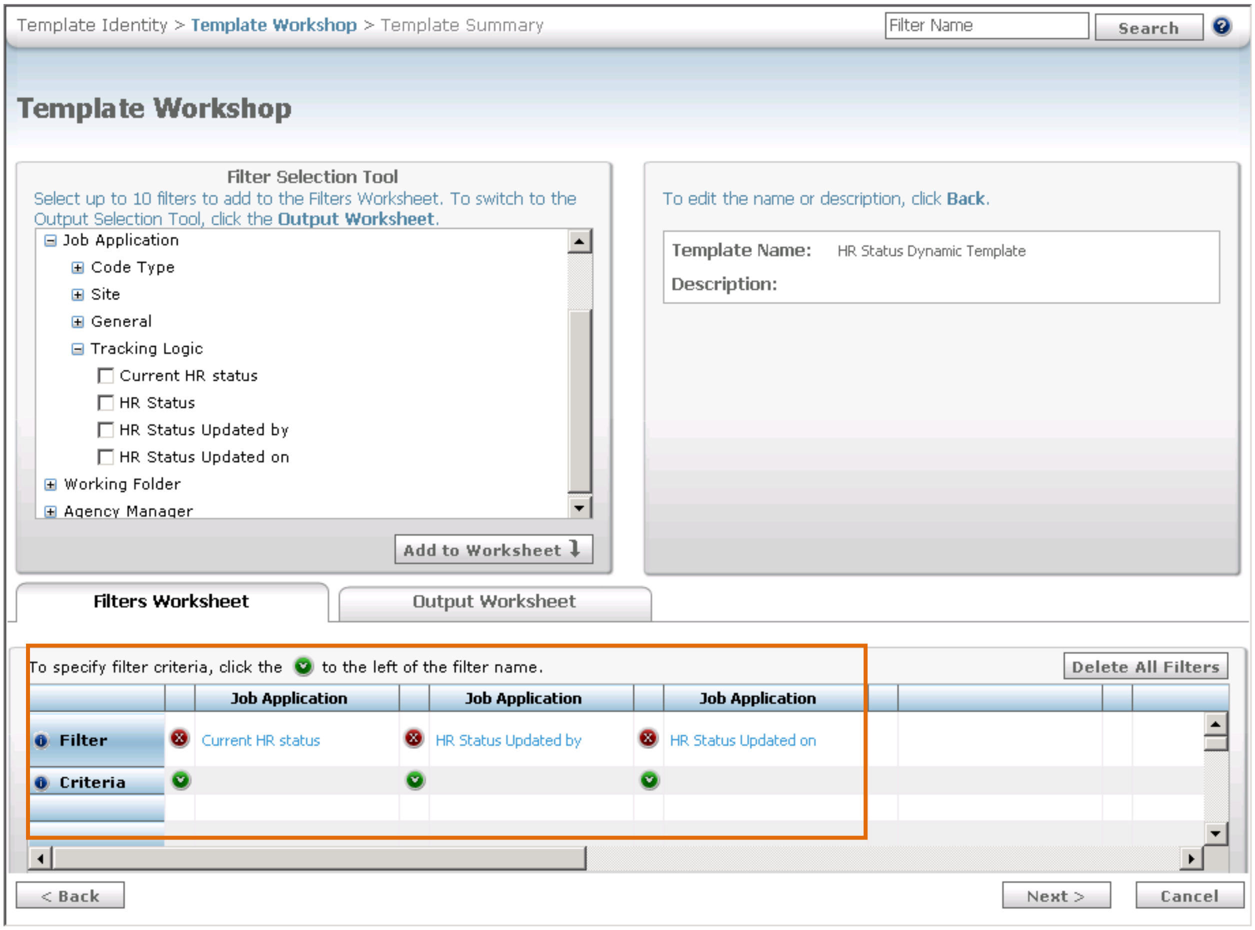
   Note: You can add output fields or filters in any order.



5. Select filters for this template. The filters can be all dynamic or a combination of fixed and dynamic. In the example, we selected three HR Status filters in the **Job Application > Tracking Logic** group to use as dynamic filters.



6. Add them to the **Filters Worksheet**.



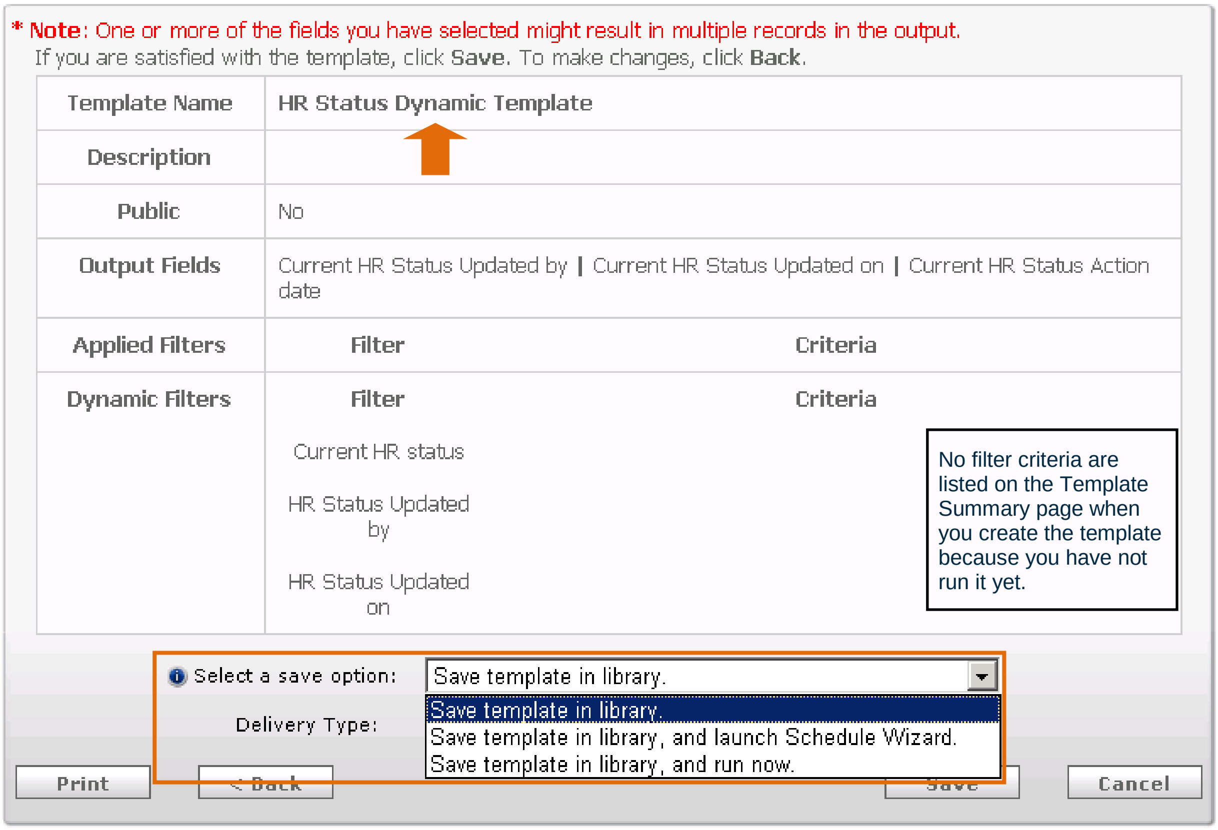
7. The filters are listed in the **Filter** row in the worksheet. Because these are dynamic filters, you do not have to add filter criteria. Click **Next >** to see the **Template Summary** page.

8. On the **Template Summary** page, you can see the following:

   - Template name, description, whether the template is Public or not, and output fields
   - **Applied Filters:** This section displays fixed filters and filter criteria for the template that are included in every run, if they exist.
   - **Dynamic Filters:** This section displays the dynamic filters, and criteria from the **Last Run**, if a run has taken place.
   - **Save options:** See the next step for more information.

9. You have three options for saving and running dynamic templates. In each case, the template is listed in the **Default** category of templates in your template library with a type of **[Dynamic]**:

   - Save template in library.
   - Save template in library, and launch schedule wizard.
   - Save template in library, and run now.



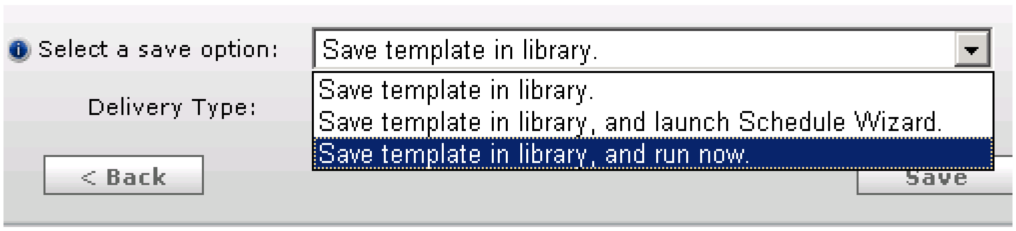
10. The template is saved to your **My Template Library** for all selections.

The next section describes how to run a dynamic template now.

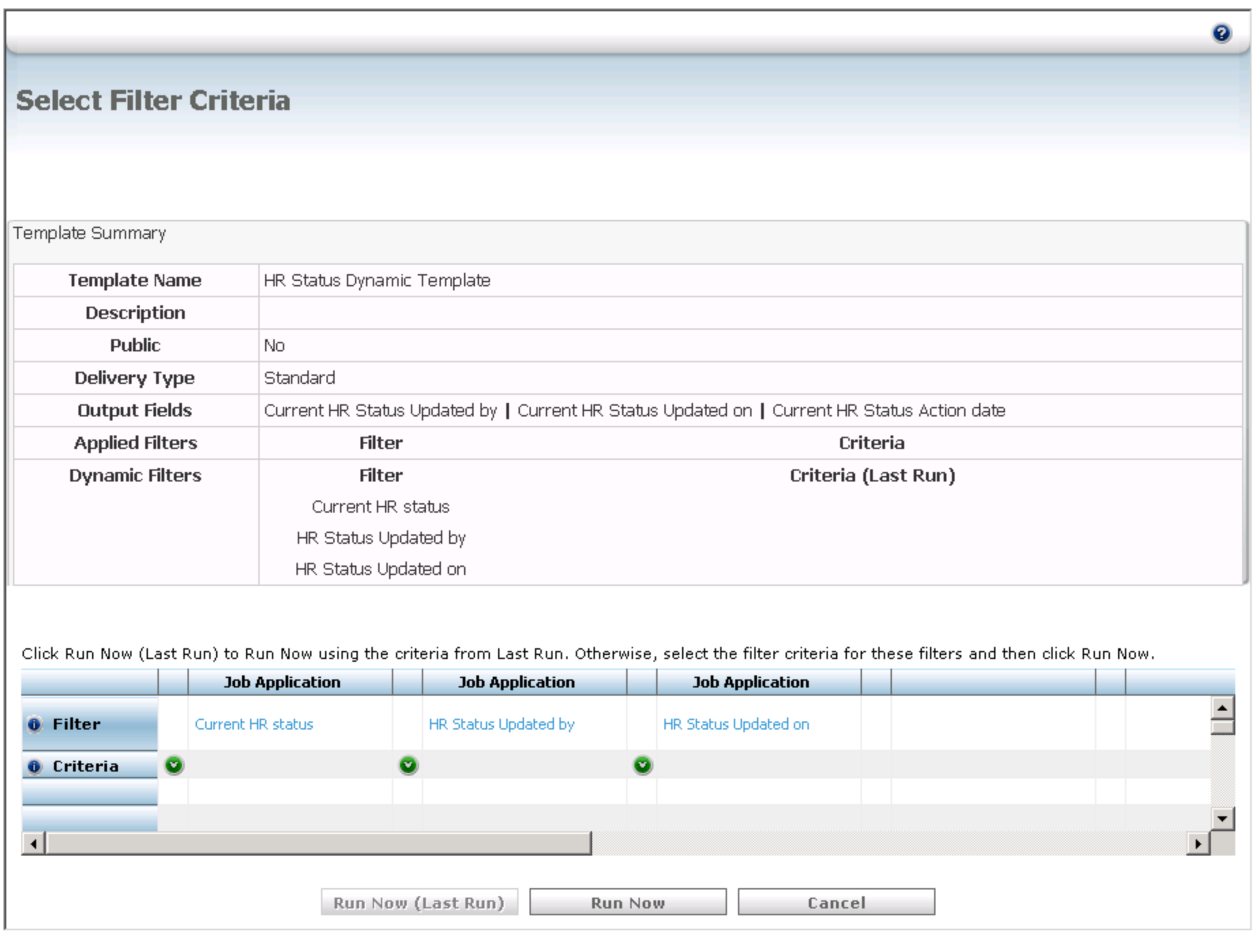
Running the Dynamic Template Now

Follow the steps in the previous section to create a dynamic template if you have not created the one that you want to run already.

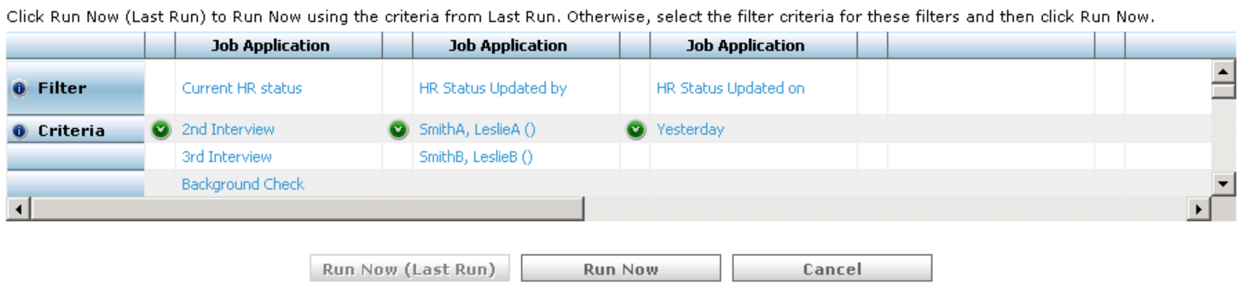
1. Select **Save template in library, and run now**.



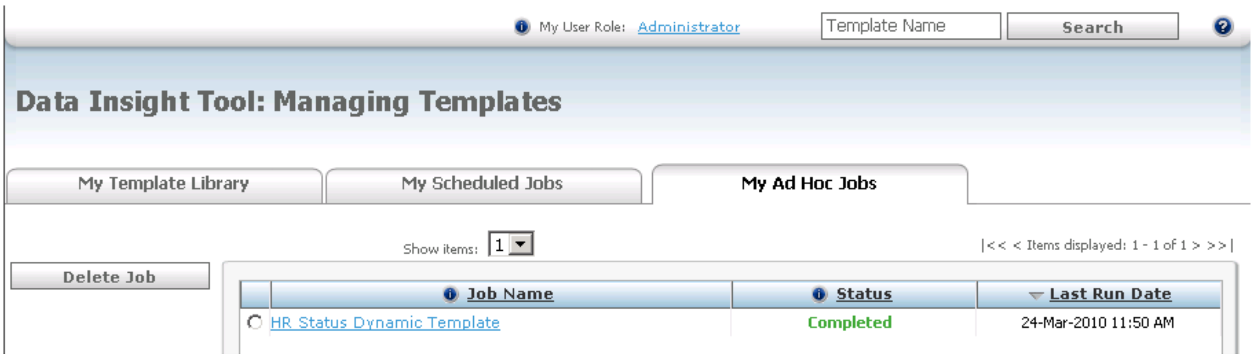
2. Because you are running the template now, you must select filter criteria for your dynamic filters. The **Select Filter Criteria** page launches.



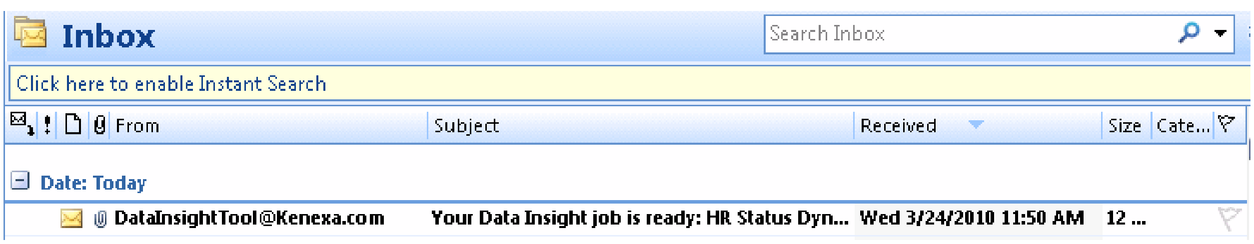
3. Add filter criteria for each filter in the template. You cannot delete or change filters on this screen. (To change or delete filters, you would have to edit the template.)



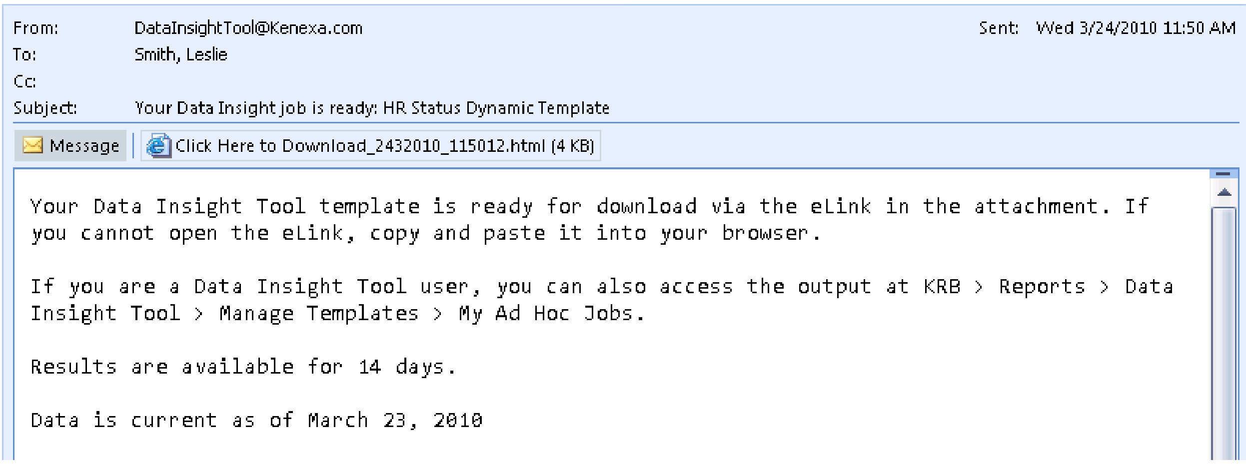
4. Click **Run Now**. Because this is the first time you are running this template, the **Run Now (Last Run)** button is disabled.
5. Your **My Ad Hoc Jobs** tab displays. It shows the job in **Running** status and then in **Completed** status.



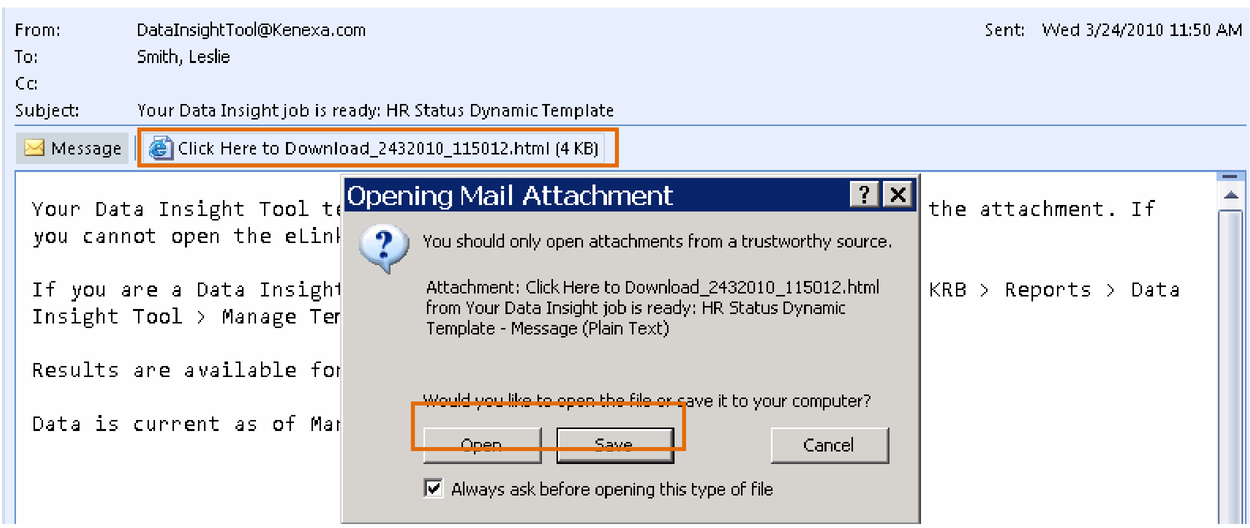
6. When the job has finished running, an e-mail notification is sent automatically to your Inbox.



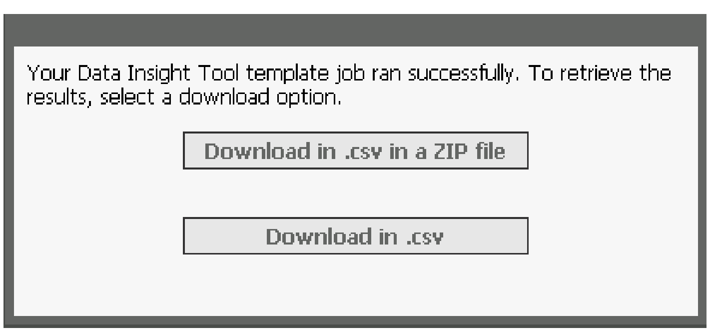
7. The e-mail message is similar to the following:



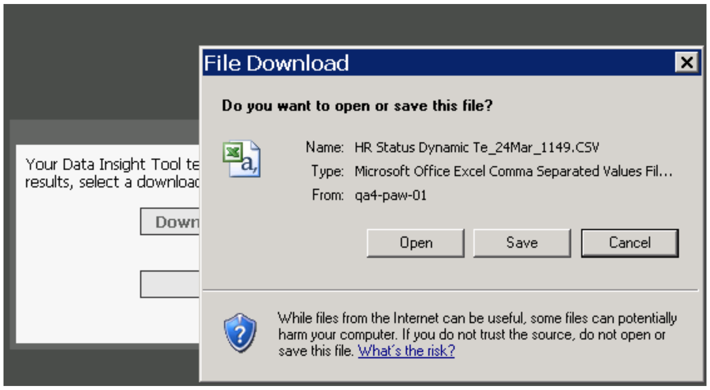
8. Click the attachment to open it, and then click **Open** or **Save** in the **Opening Mail Attachment** window:



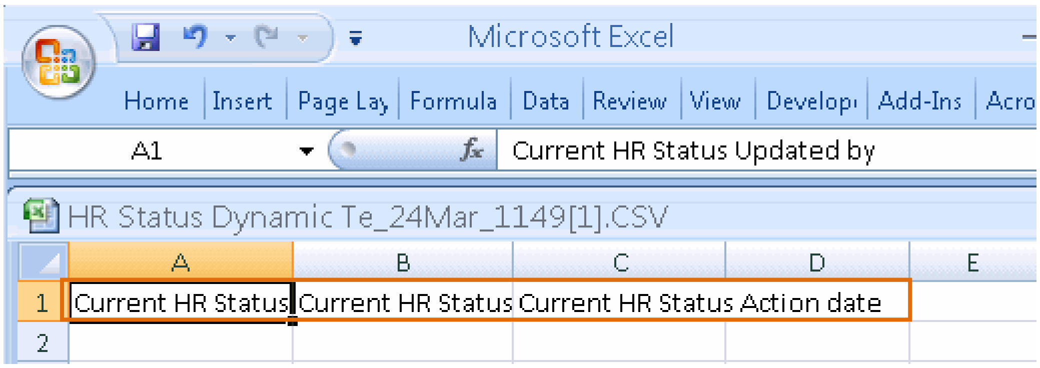
9. Click **Open** or **Save**. If you click **Open**, the download file format selection window appears. You can choose to download either the .csv file inside of a ZIP file (this is a better selection for large files), or download just the unzipped .csv file.



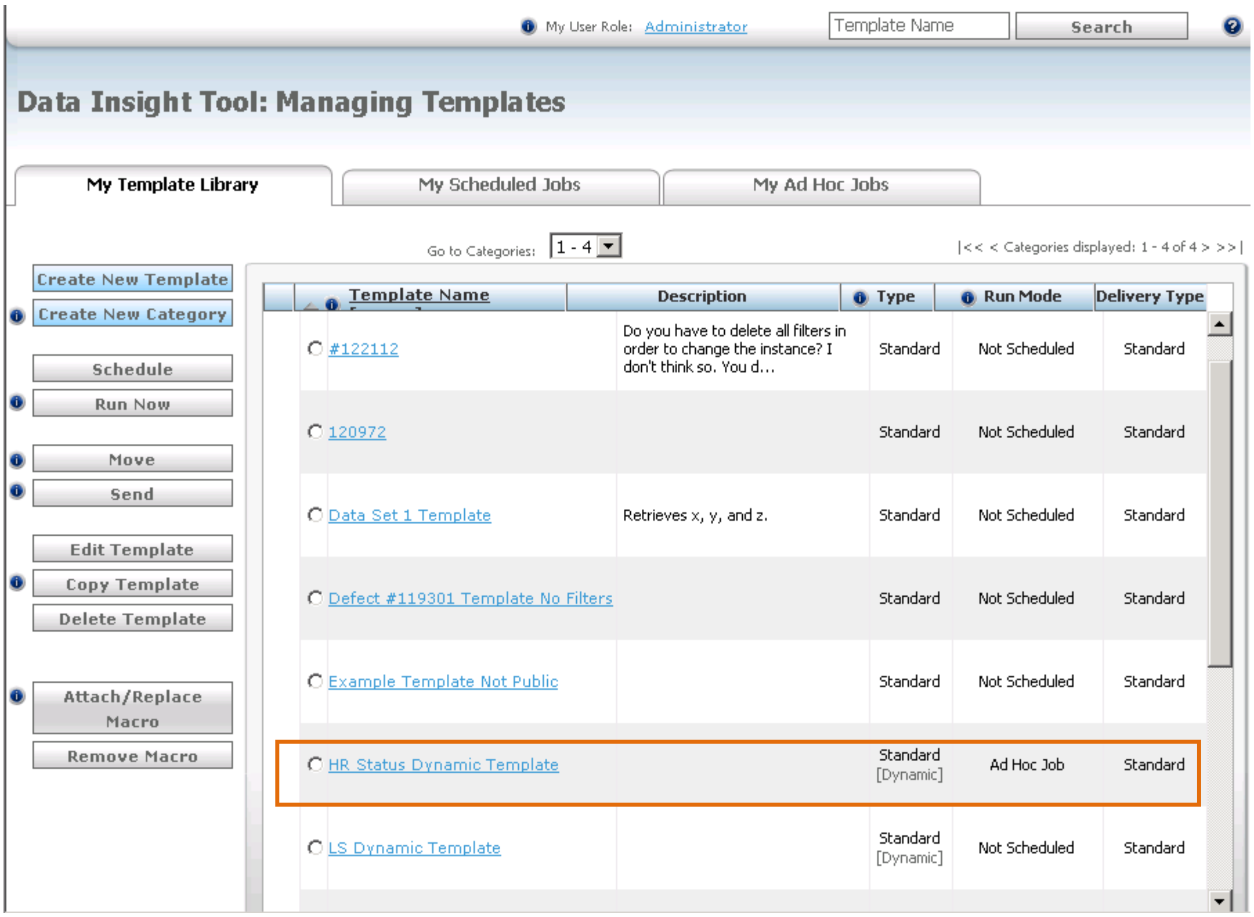
10. The standard file download window appears.



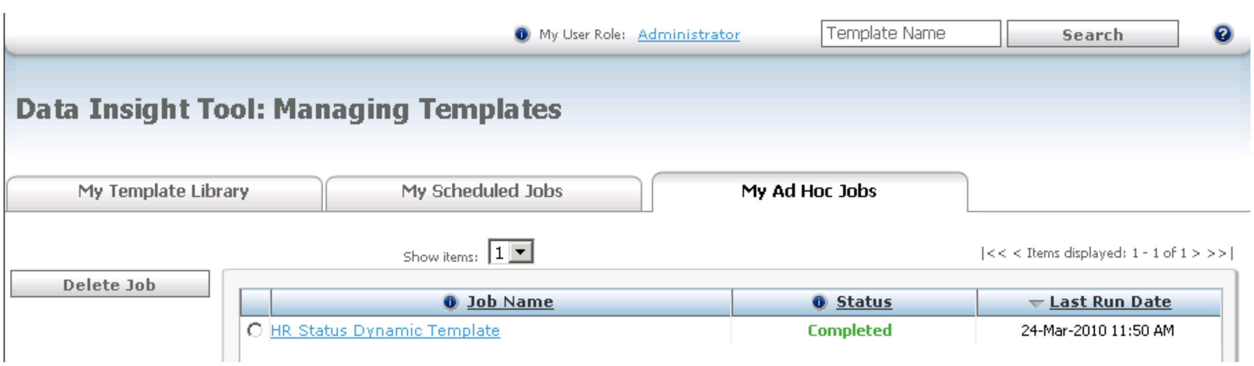
11. You can save the .cvs file or open it. If you click **Open**, the Excel file with your template selections opens.



12. The dynamic template is updated in your **My Template Library**, indicating that an **Ad Hoc Job** was run using this template:



13. The ad hoc job is listed for 14 days and then deleted (the same as for all job runs in the Data Insight Tool).

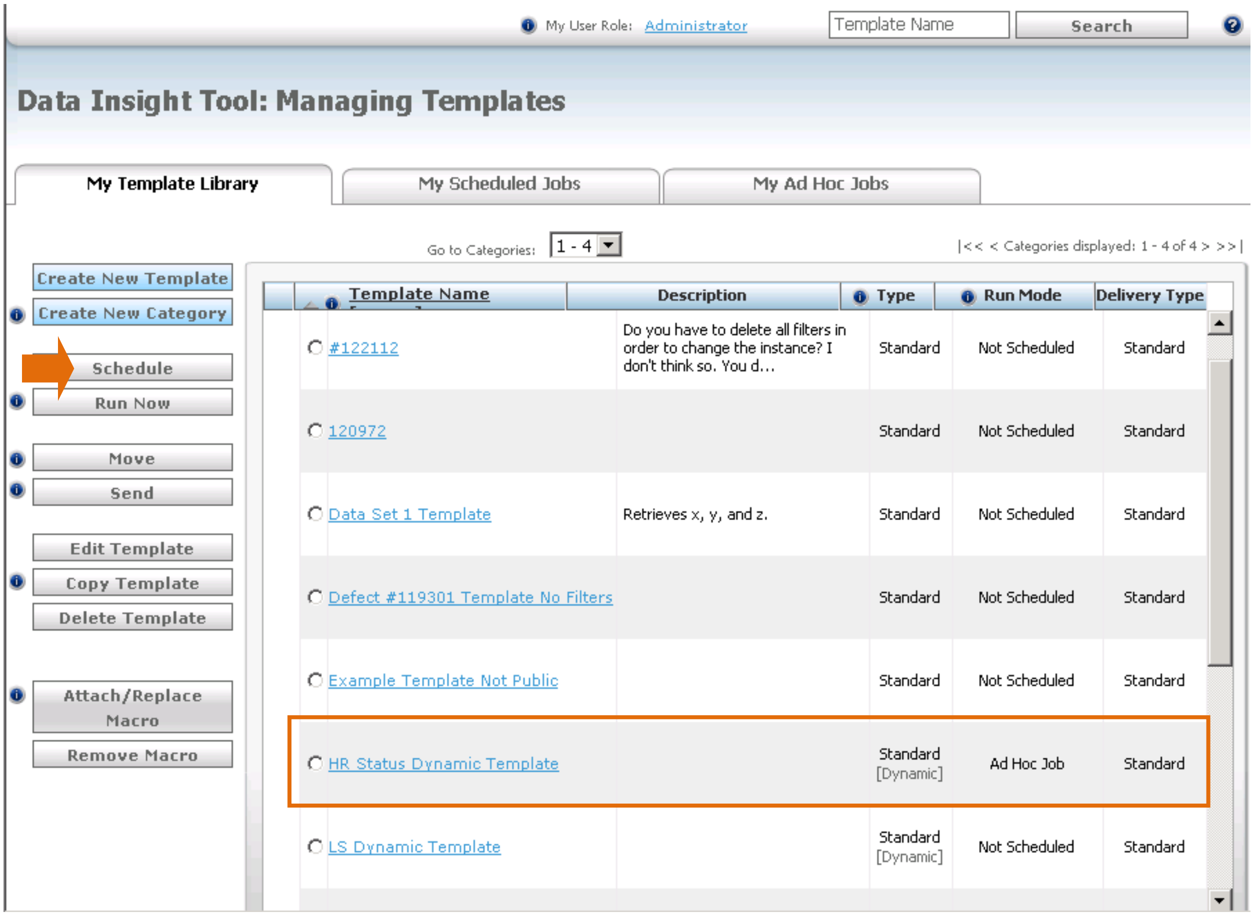


Scheduling a Dynamic Template

You can schedule a dynamic template in two ways after you select the template and click **Schedule**:

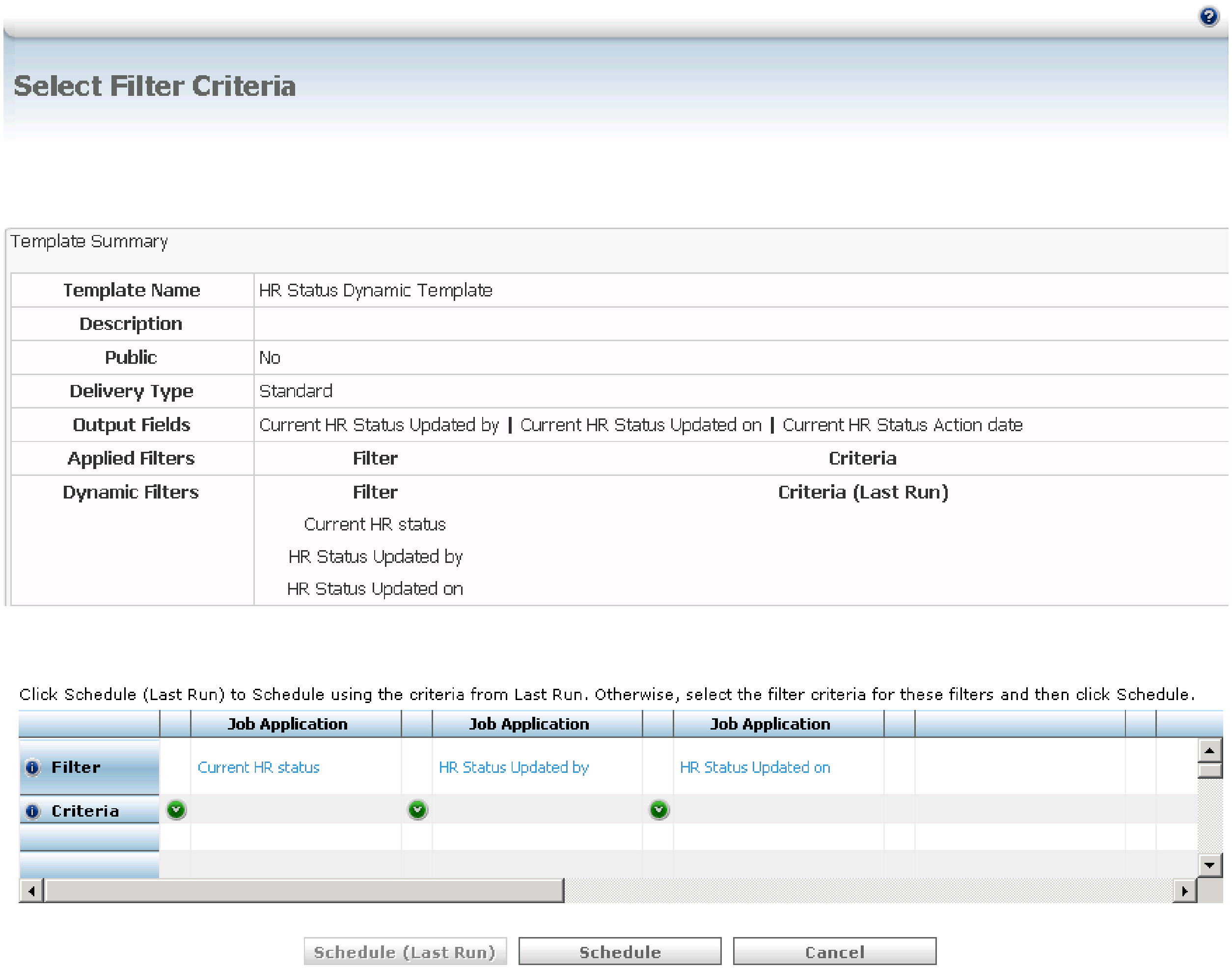
- By selecting filter criteria on the **Select Filter Criteria** page before completing the schedule wizard
- By clicking the **Schedule (Last Run)** button on the **Select Filter Criteria** page.

You can use the **Schedule (Last Run)** method only when a template has been run at least once as an **Ad Hoc Job**. The Data Insight Tool scheduler assumes that the dynamic filter criteria selected for that ad hoc job (the last run of the template) will be the filter criteria for the scheduled template.



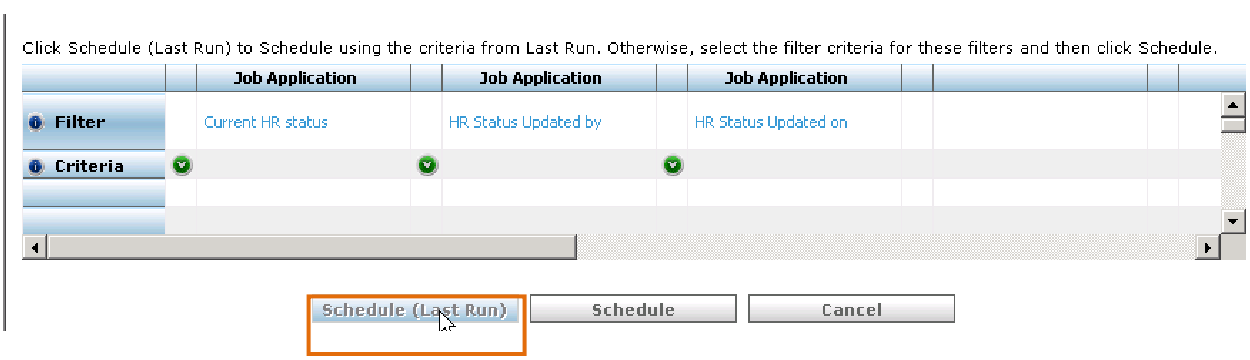
To schedule the dynamic template:

1. Navigate to your **My Templates Library**.
2. Select the radio button for the dynamic template you want to schedule and click **Schedule** in the left navigation panel.
3. The **Select Filter Criteria** page displays.

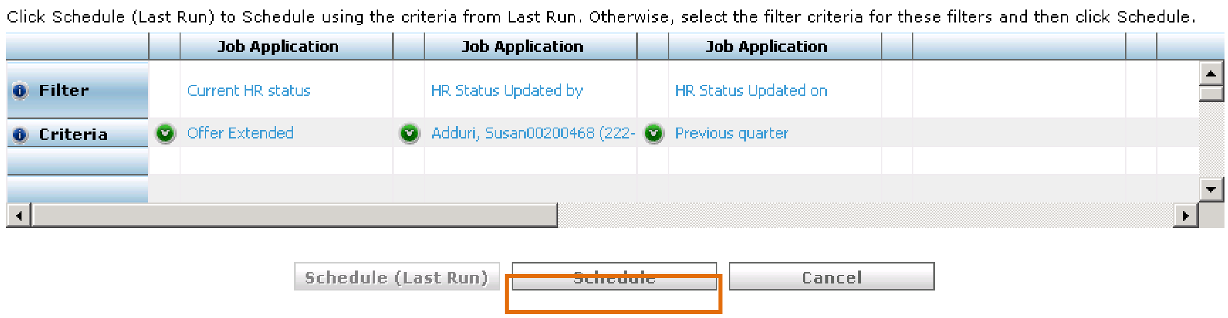


4. In this example, you have already run this dynamic template at least once as an ad hoc job. If you want to keep the same criteria used for the last run, click **Schedule (Last Run)**.

   If you have not run this template before, you cannot click **Schedule (Last Run)** – it is disabled.

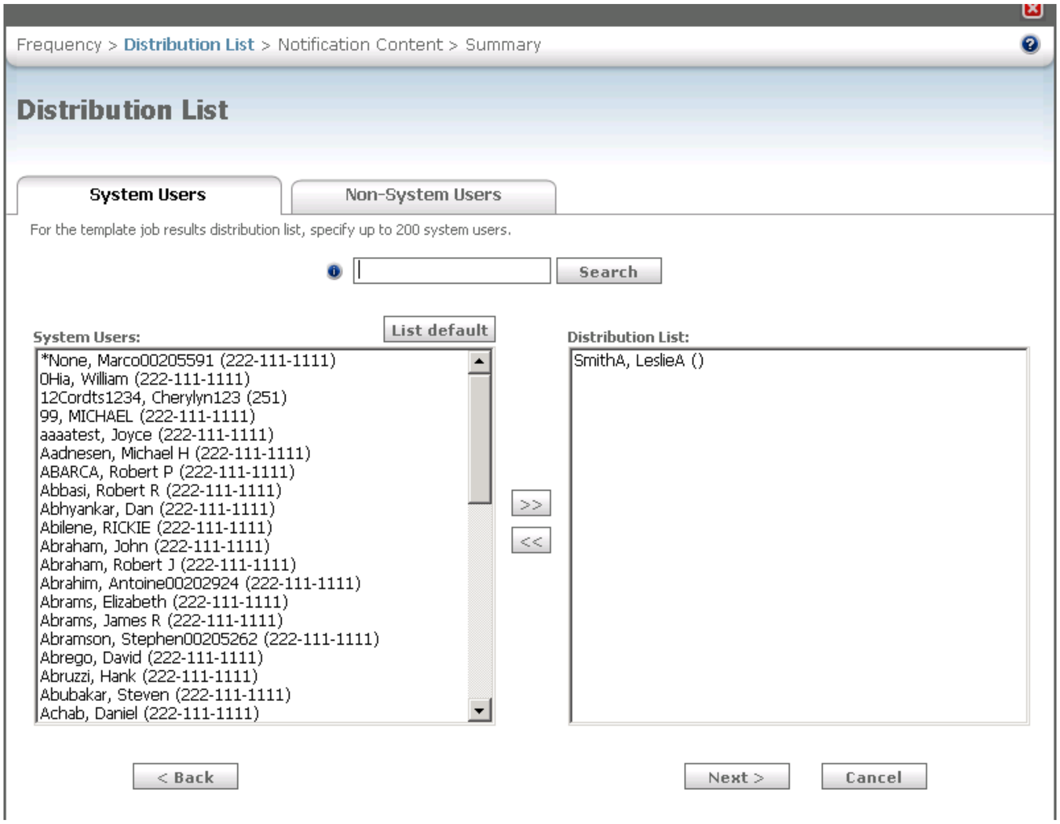


5. You must add filter criteria for all dynamic filters saved in this template. You cannot change or delete filters at this point in the workflow. (To change or delete filters, you must edit the template.)

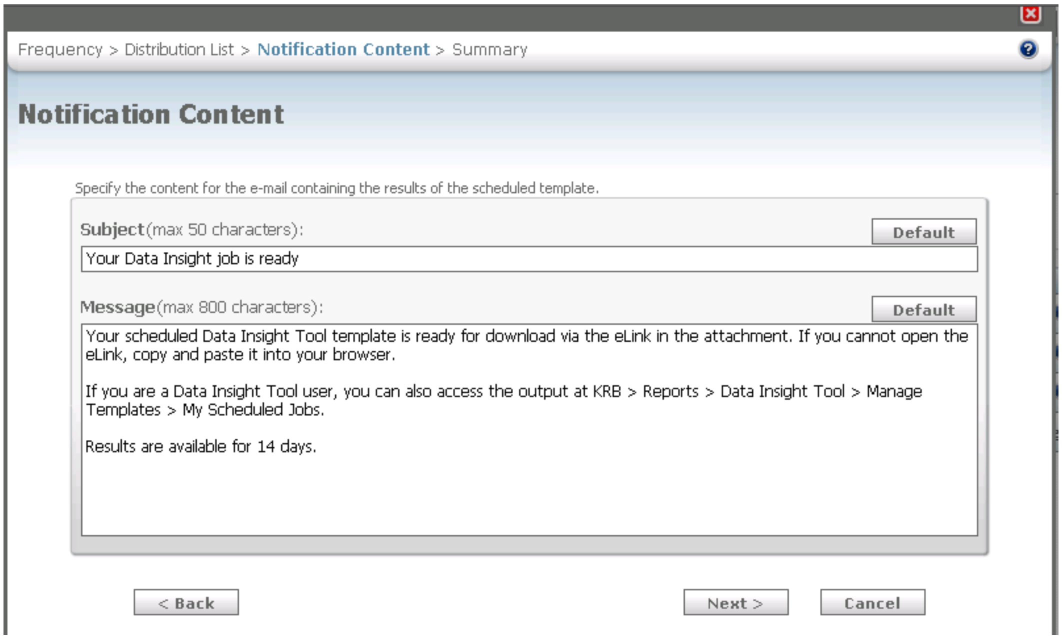


6. After adding the filter criteria, click **Schedule**. The **Frequency** page displays.
7. Select the settings for this page and click **Next >**.

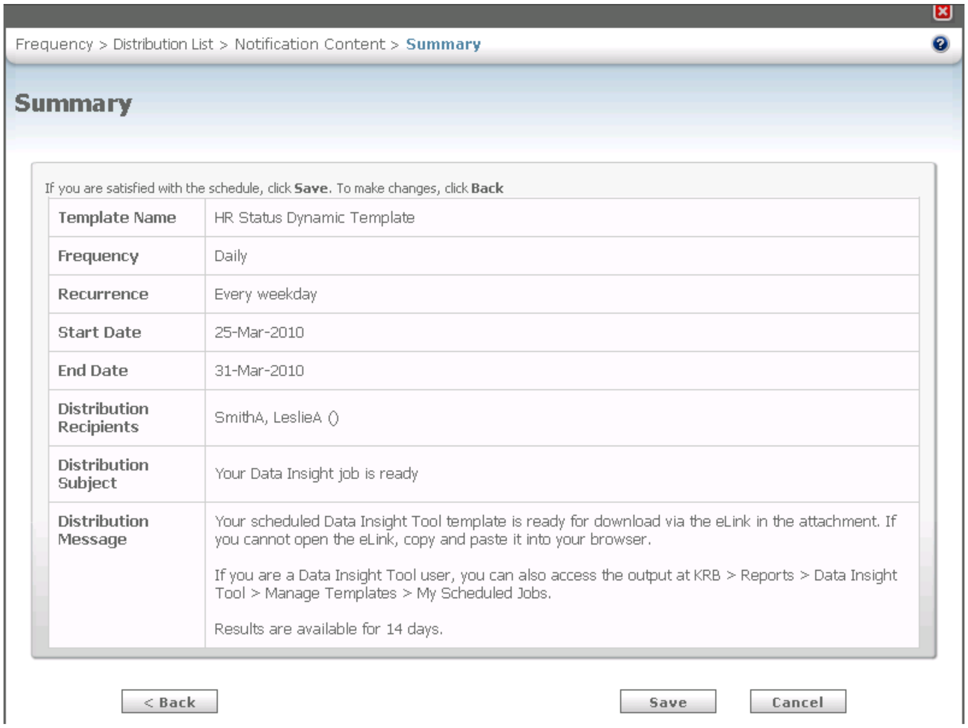
8. Select the recipients of the report on the **Distribution List** page.



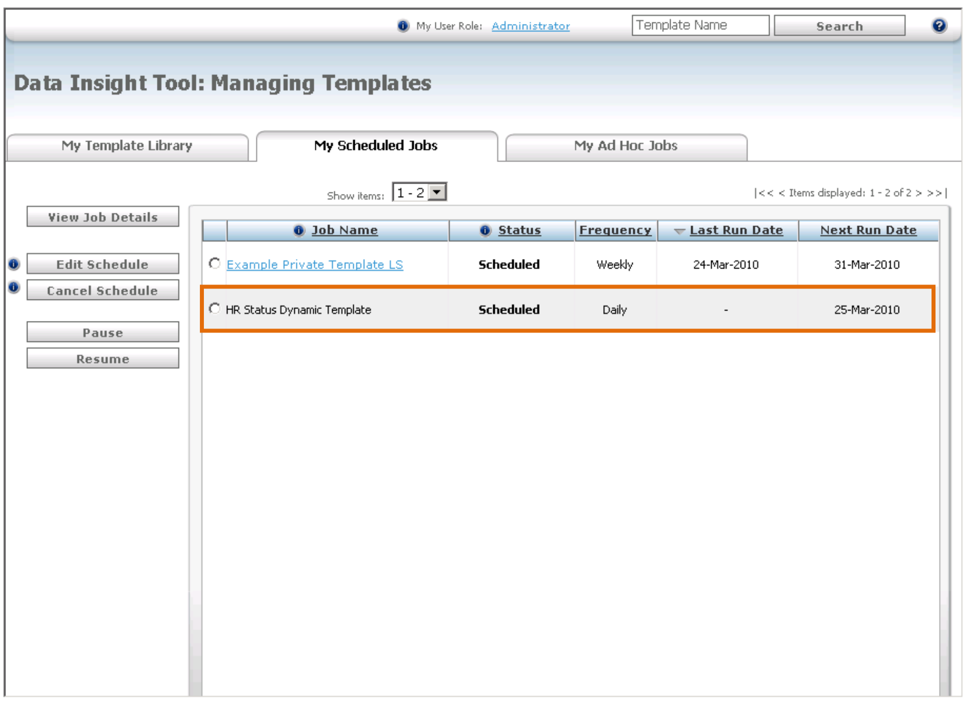
9. Review the notification content and edit it if desired. Click **Next >** when you are finished.



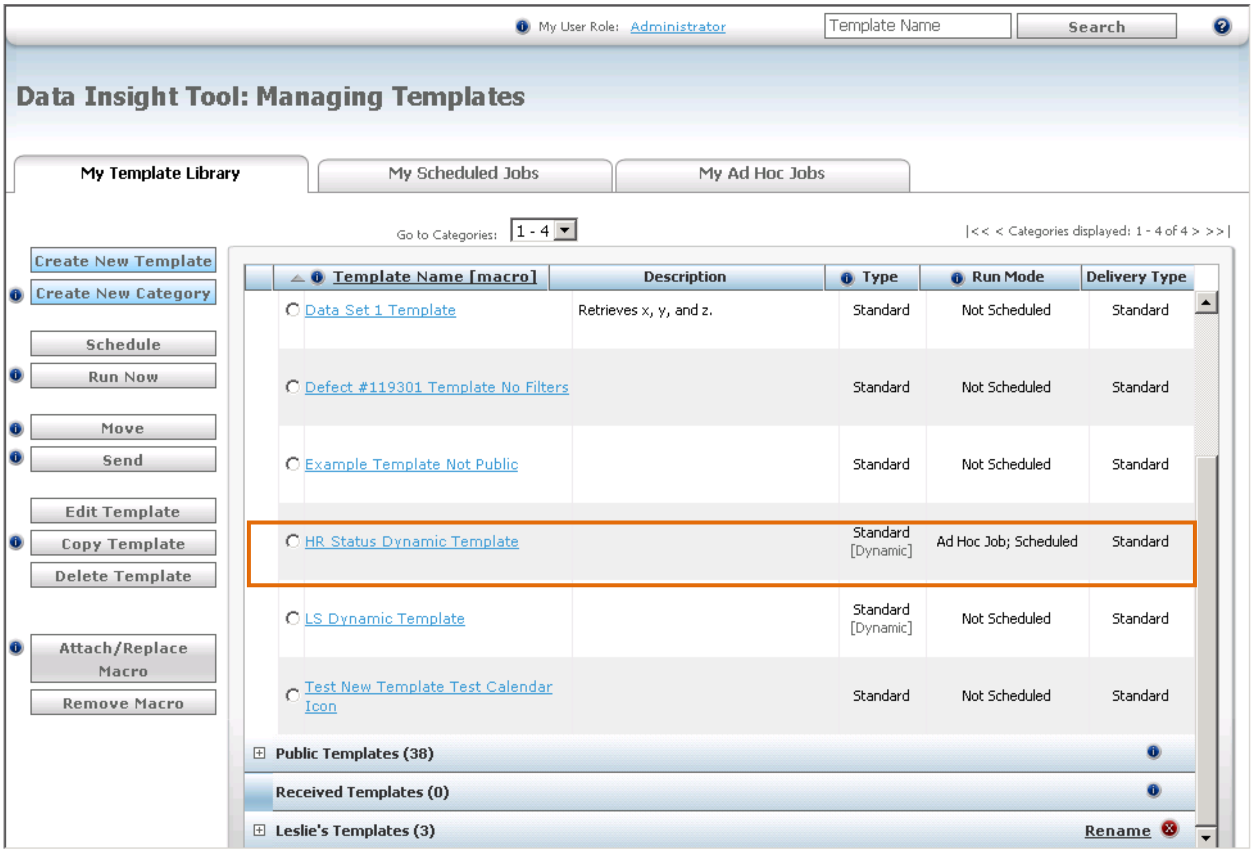
10. The **Summary** page displays. Review the details and click **Save** when you are finished.



11. The schedule is saved to your **My Scheduled Jobs** tab.



12. Its status is updated in your **My Template Library**.


My User Role: Administrator
Template Name
Search
Data Insight Tool: Managing Templates
My Template Library
My Scheduled Jobs
My Ad Hoc Jobs
Go to Categories: 1 - 4
|<< < Categories displayed: 1 - 4 of 4 > >>|
Create New Template
Create New Category
Schedule
Run Now
Move
Send
Edit Template
Copy Template
Delete Template
Attach/Replace Macro
Remove Macro
Template Name [macro]
Description
Type
Run Mode
Delivery Type
Data Set 1 Template
Retrieves x, y, and z.
Standard
Not Scheduled
Standard
Defect #119301 Template No Filters
Example Template Not Public
HR Status Dynamic Template
Standard [Dynamic]
Ad Hoc Job; Scheduled
LS Dynamic Template
Test New Template Test Calendar Icon
Public Templates (38)
Received Templates (0)
Leslie's Templates (3)
Rename

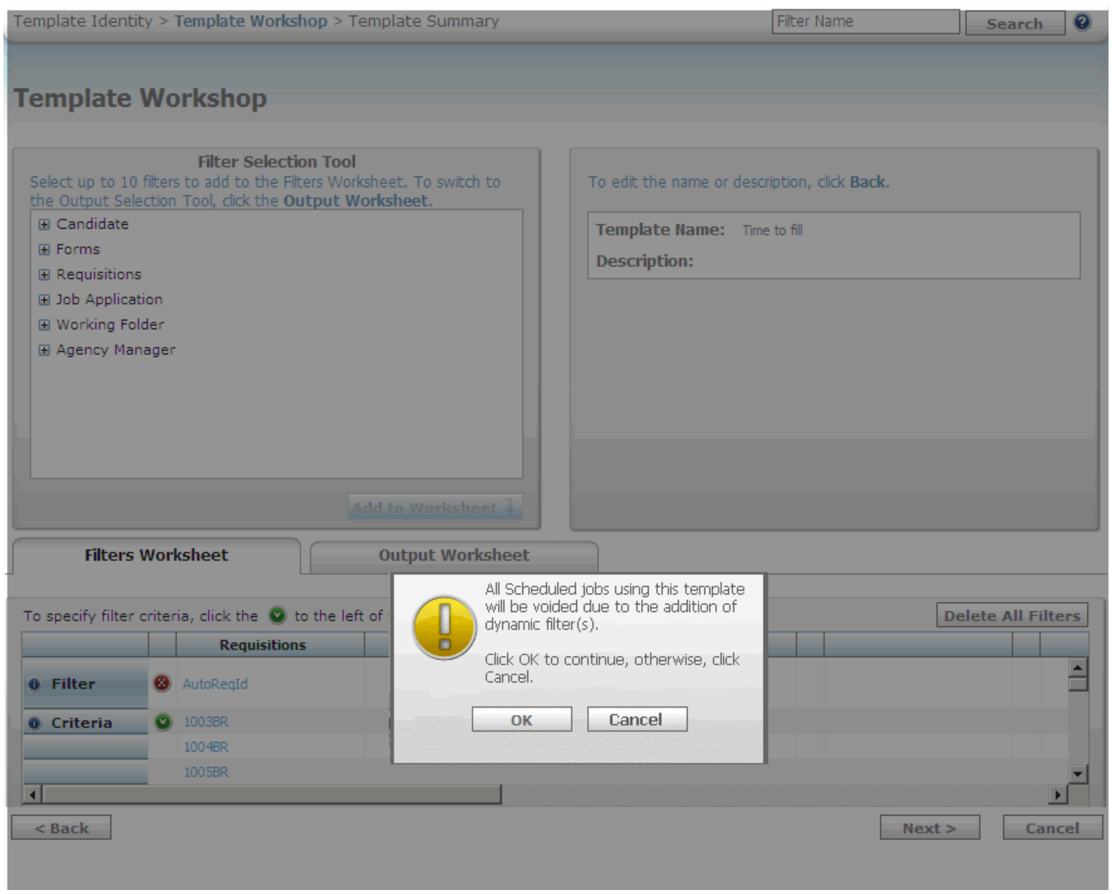
Re-Scheduling a Template with Dynamic Filters

To re-schedule a dynamic template from your **My Scheduled Jobs** tab:

1. Navigate to your **My Scheduled Jobs** tab, select a dynamic template that has been scheduled to run.
2. Click **Edit Schedule**.
3. The **Select Filter Criteria** page displays. The **Dynamic Filters** section displays the filter criteria selected for the last run in the **Criteria (Last Run)** column.
4. If desired, you can select a new set of criteria at this time. Click **Schedule** to launch the schedule wizard.
5. Step through the wizard and save the new schedule for this template.
6. The template is updated on the **My Scheduled Jobs** tab. When the scheduled job runs, the template uses the saved filter criteria.

Effect of Adding Dynamic Filters on Existing Schedules

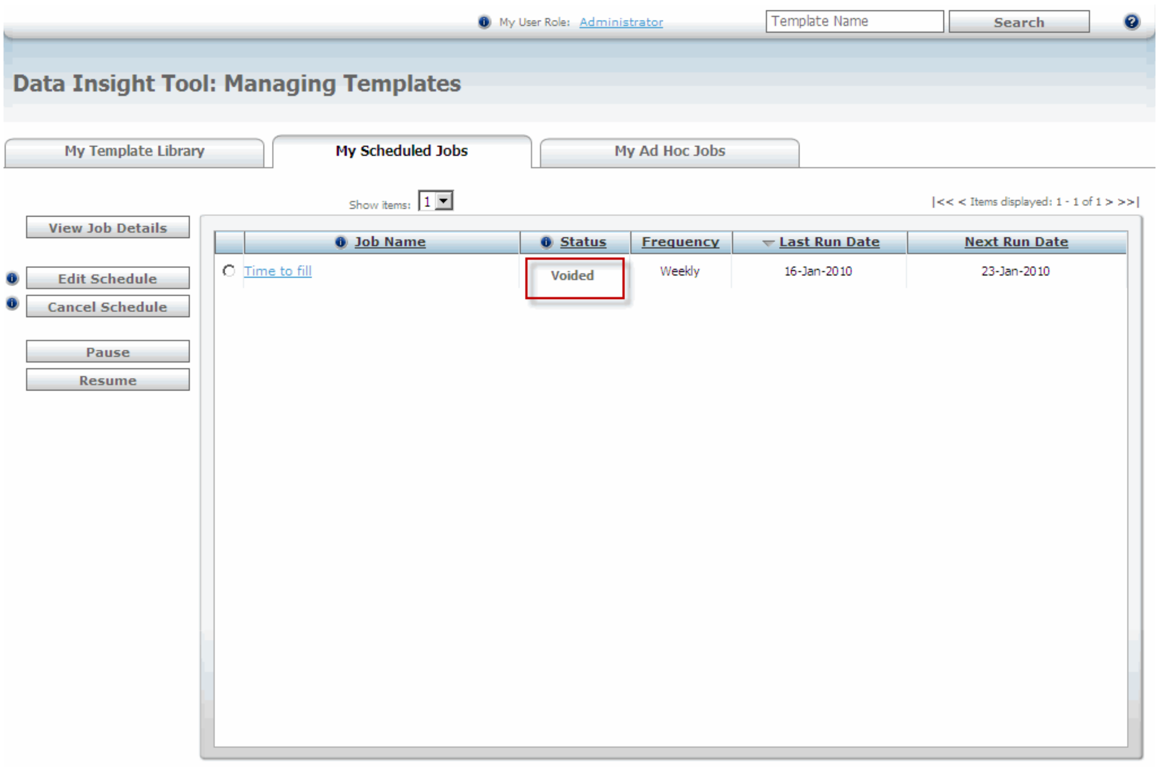
When you edit a template with for which there is a scheduled job, the system warns you that all scheduled jobs using this template will be voided due to the addition of dynamic filters.



If you click **Cancel** on the **Template Summary** page, edits you made to the template are discarded. Scheduled jobs remain intact.

Once you submit the edits to the Template, the system saves the template and voids all existing scheduled jobs using this template. You will have to set up new schedules with the updated template.

Your **My Scheduled Jobs** tab displays the voided job.



On the **My Template Library** tab, the template that was edited no longer displays “Scheduled” in the **Run Mode** column, but reverts to “Not Scheduled” after the scheduled jobs are voided as a result of editing the template.

Editing Private / Public Templates with Dynamic Filter(s)

To edit a dynamic template:

1. Navigate to your **My Template Library**.
2. Select a dynamic template and click **Edit Template**.

If you are editing an existing template:

If you add new dynamic filters to a template that previously did not have dynamic filters, when you click **Save**, existing schedules are voided.

Jobs that were scheduled, were run, and then were voided do not display the **Last Run Date** or the **Next Run Date** on the **My Scheduled Jobs** tab.

If a job was scheduled and then voided before it ran, there is no **Last Run Date** and **Next Run Date**.

Data Insight Tool: "Minimum Score to Administer Assessment" Filter/Field

The **Requisition > Posting Details** category in the Data Insight Tool's Template Workshop includes a new filter and output field: **Minimum Score to Administer Assessment**.

Feature Summary Grid

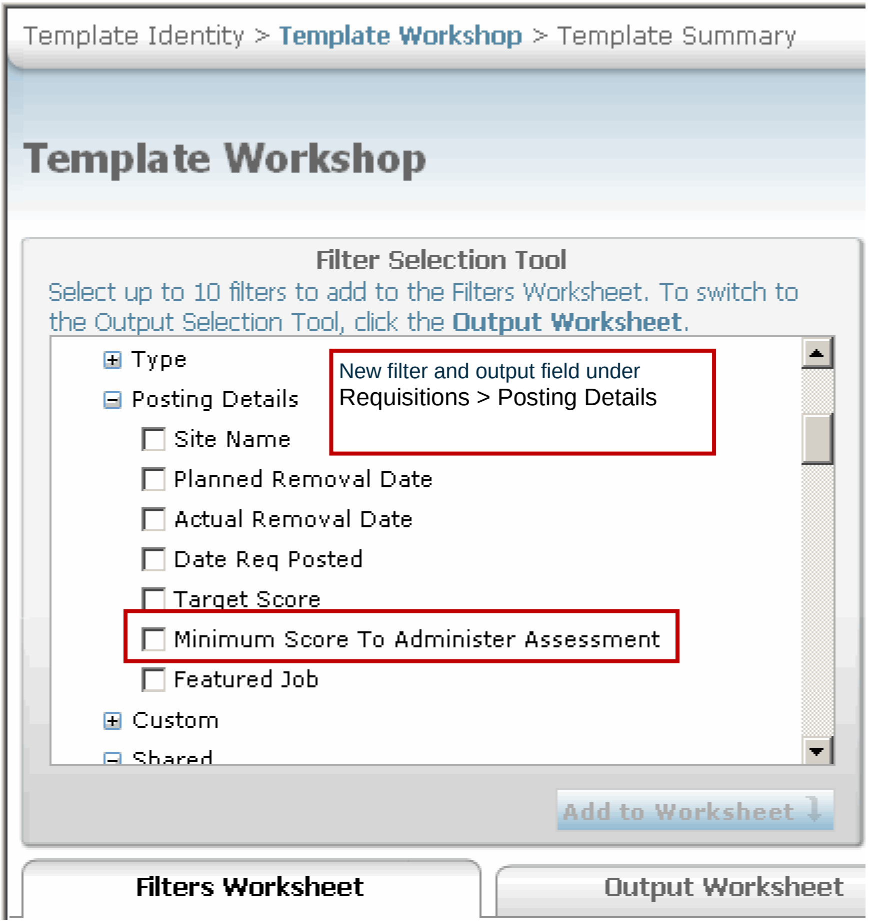
Date Available	US: 11/MAR/2010 EU: 17/MAR/2010
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☐ Workbench Self-Service ☐ 2x BrassRing New UI ☑ 2x BrassRing ☐ Talent Gateways ☐ Agency Manager ☑ Data Insight Tool ☐ 2x SmartApproval ☐ 2x Onboard
Visible Changes	☐ No – contact your CSC for implementation details. ☑ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☑ Automatic – see details below. ☐ Specific conditions required – see details below. ☐Configuration required – contact your CSC for details.

How Do Clients Get this Feature?

This feature is available automatically without configuration to customers who use the Data Insight Tool.

Data Insight Tool User Experience

The **Requisition > Posting Details** category in the Data Insight Tool's Template Workshop includes the following new filter and output field: **Minimum Score to Administer Assessment**.



Data Insight Tool: Four New Filters and Output Fields

The Data Insight Tool has four new filters and output fields listed under **General Fields** and under **Forms**: **Added on**, **Added by**, **Edited on**, and **Edited by**.

Date Available	US: 11/MAR/2010 EU: 17/MAR/2010
Cost	☐ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☐ Workbench Self-Service ☐ 2x BrassRing New UI ☐ 2x BrassRing ☐ Talent Gateways ☐ Agency Manager ☑ Data Insight Tool ☐ 2x SmartApproval ☐ 2x Onboard
Visible Changes	☐ No – contact your CSC for implementation details. ☐ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☐ Specific conditions required – see details below. ☐Configuration required – contact your CSC for details.

Benefits

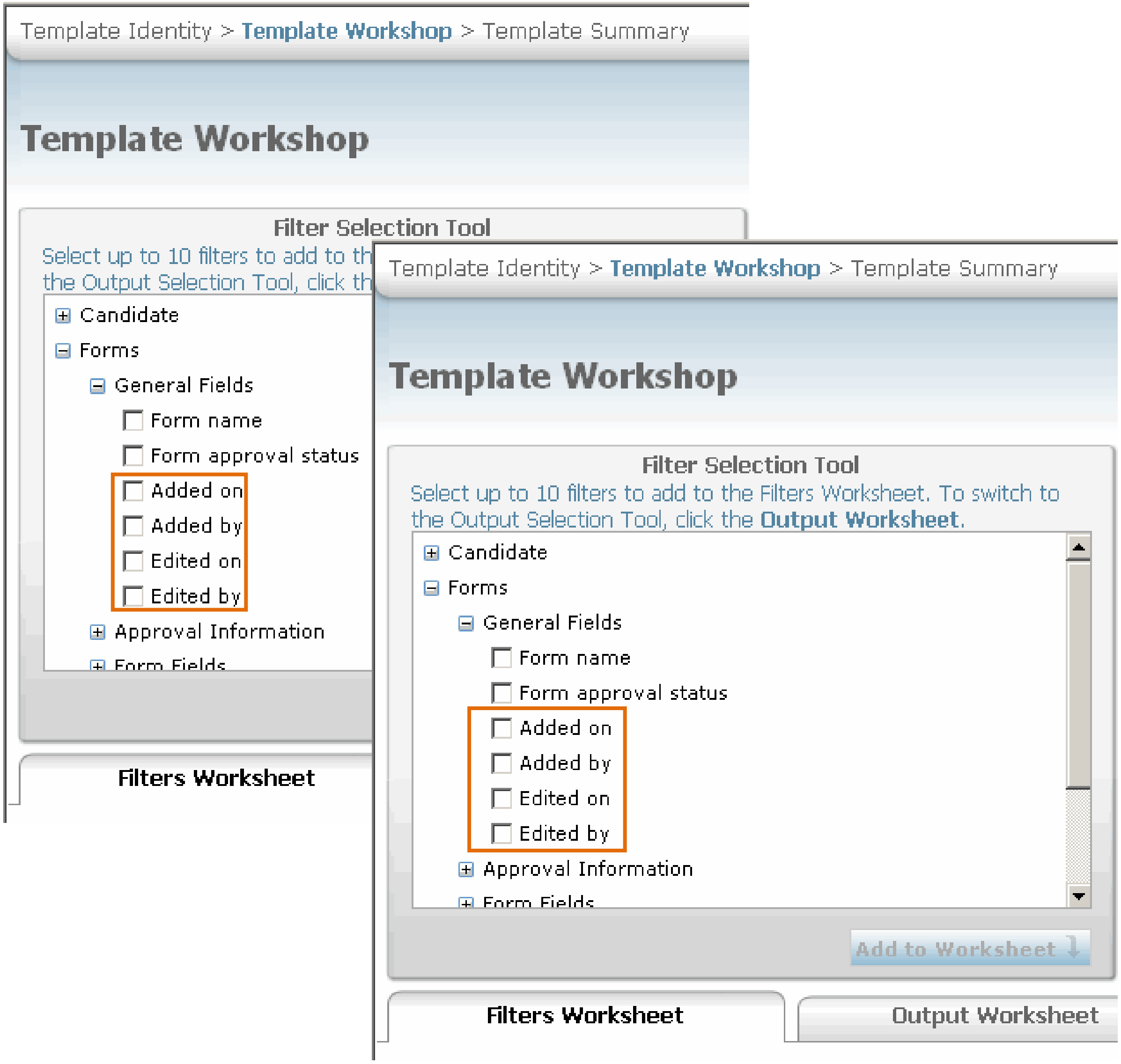
2x BrassRing captures this information for forms, Data Insight Tool users can include it in report templates, and companies can view and extract this data if desired.

How Do Clients Get this Feature?

This feature is available automatically without configuration to customers who use the Data Insight Tool.

Data Insight Tool User Experience

Users with user role access to these fields can add them to their templates as filter fields and/or output fields, as shown in the screen capture below.


Template Identity > Template Workshop > Template Summary
Template Workshop
Filter Selection Tool
Select up to 10 filters to add to the Filters Worksheet. To switch to the Output Selection Tool, click the Output Worksheet.
Candidate
Forms
General Fields
Form name
Form approval status
Added on
Added by
Edited on
Edited by
Approval Information
Form Fields
Add to Worksheet
Filters Worksheet
Output Worksheet

Data Insight Tool: “Common” Category Renamed to “Shared”

The “**Common**” category under **Requisitions** in the Data Insight Tool’s **Template Workshop** has been renamed to “**Shared**” and it now includes custom requisition fields that are shared in more than one requisition form.

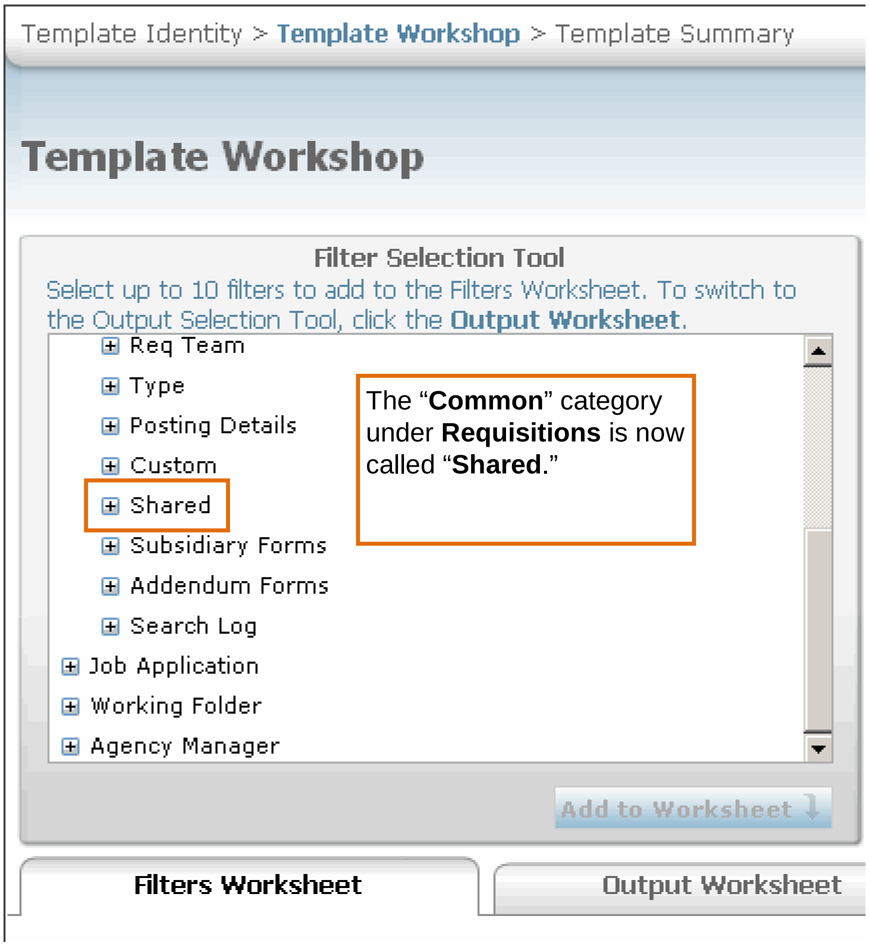
Date Available	US: 11/MAR/2010 EU: 17/MAR/2010
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☐ Workbench Self-Service ☐ 2x BrassRing New UI ☐ 2x BrassRing ☐ Talent Gateways ☐ Agency Manager ☑ Data Insight Tool ☐ SmartApproval ☐ 2x Onboard
Visible Changes	☐ No – contact your CSC for implementation details. ☑ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☑ Automatic – see details below. ☐ Specific conditions required – see details below. ☐Configuration required – contact your CSC for details.

How Do Clients Get this Feature?

This feature is available automatically without configuration to customers who use the Data Insight Tool.

Data Insight Tool User Experience

The “**Common**” category under **Requisitions** in the Data Insight Tool’s **Template Workshop** has been renamed to “**Shared**” and it now includes custom requisition fields that are shared in more than one requisition form.



Employee Referral Gateway: Displaying HR Status and Date

This feature provides an option for your organization to display HR status (including TG HR status masks) and the HR status date on your employee referral gateways. This allows employees to check the status of candidates they have referred.

Date Available	US: 18/FEB/2010 EU: 24/FEB/2010
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☐ Workbench Self-Service ☐ New UI ☐ 2x BrassRing ☑ Talent Gateways ☐ Agency Manager ☐ Data Insight Tool ☐ SmartApproval
Visible Changes	☑ No – contact your CSC for implementation details. ☐ Yes – see the cumulative Visible Changes document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☐ Specific conditions required – see details below. ☑ Configuration required – see details below.

Benefits

Employees who have referred candidates frequently ask recruiters in their organization for the status of those referred candidates. This feature saves recruiters the time they would spend fielding questions from employees about the status of candidates they have referred.

Feature Description

Your organization can now display **HR Status** and the **HR Status date** with other selected job and referral status fields on your employee referral site. This allows employees to check the status of candidates they have referred.

HR Statuses displayed can include TG HR status masks (where your account “masks” certain HR statuses with labels more appropriate for that gateway’s viewers). The system automatically uses the appropriate mask label when displaying a masked HR Status (if any status values are masked).

Employee Referral Gateway

Home Referral status ? Help

Referral status

Job requisition ID	HR status	HR status date	Job title	Referral submission date	Referral name	Referral status	Referral status description	Referral start date
113BR	0-Filed	02-Feb-2010	TQE Manager	02-Feb-2010	Larson, Brett	Un-reviewed		
115BR	First Interview	01-Feb-2010	Kitchens Planner	01-Feb-2010	Lamast, Beth	Un-reviewed		
115BR	Intermediate Status	02-Feb-2010	Kitchens Planner	02-Feb-2010	Larson, Carol	Un-reviewed		
117BR	0-Filed	01-Feb-2010	Asst, Executive Sr	01-Feb-2010	Lamast, Beth	Un-reviewed		
117BR	Third Interview	01-Feb-2010	Asst, Executive Sr	26-Jan-2010	Lamast, Nathan	Un-reviewed		
117BR	Second Interview	01-Feb-2010	Asst, Executive Sr	01-Feb-2010	Lamast, Amy	Un-reviewed		

How Do Clients Get this Feature?

Display of these fields is controlled in Talent Gateway administration. Please contact your CSC for more information about enabling their display.

SAML SSO Extended to Employee Referral Gateways

Clients can already implement SAML-based Single Sign On (SSO) for KRB and Talent Gateways. As of this release, they can elect to use the SAML SSO implementation for Employee Referral Gateways as well.

SAML is the Security Assertion Markup Language. According to Wikipedia, it “is an xml-based standard for exchanging authentication and authorization data between two security domains.” (See http://en.wikipedia.org/wiki/Saml for more information.)

Single Sign On (SSO) is the capability for users of a system to log in once only and have access to multiple systems within the enterprise environment for which their role or user type has privileges.

Feature Summary Grid

Date Available	US: 28/Jan/2010 EU: 03/Feb/2010
Cost	☐ No additional cost ☑ Additional cost – contact your CSC for details.
Product	☑ Talent Gateways – Employee Referral Gateways
Visible Changes	☑ No – contact your CSC for details. ☐ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see feature description below. ☑ Specific conditions required – see feature description below. ☑ Configuration required – contact your CSC for details.

Benefits

Clients can use a unified SAML SSO implementation for KRB, Talent Gateways, and Employee Referral Gateways.

Feature Description

Employee Referral Gateways (ERGs) can use the SAML SSO implementation or the original proprietary SSO implementation available before this release.

The SAML SSO authentication process checks if the posted form is from an SSO or non-SSO gateway and proceeds accordingly. It checks for additiona data passed in the xml file to determine if it is a SAML SSO gateway or the proprietary SSO gateway type.

The SAML SSO feature for Employee Referral Gateways works with or without Data Privacy turned on.

Best Practice Recommendations

Limitations and Known Issues

How Do Clients Get this Feature?

The suite of SAML SSO integrations is part of the Kenexa Global Talent Management's Professional Services Offerings. Please contact your CSC for more information.

Employee Referral Gateway User Experience

Who does this: Employees using Employee Referral Gateways at their company

When a logged in user (an employee) clicks the link to employee referral gateway, the SAML SSO gateway launches successfully. The user is already logged in and the "landing logged in" page displays. If employees have accessed the ERG previously and submitted referral information, that information is available for them to edit.

When the privacy setting is enabledfor the SAML SSO ERG, the user is already logged in as expected and the "landing logged in" page displays.

Users can search for openings, select requisitions, and submit a candidate for one or more posted requisitions. Referred candidates are able to submit their general or req-specific resumes.

2xB users who own the requisition can perform actions on employee-referred candidate such as file the candidate to a requisition, change the candidate's HR status, add forms to the candidate's Talent Record, and so forth.

Kenexa Tasks

Pre-Conditions

PSE must implement the SAML SSO integration for the client.

The client must have at least one encryption key group [per SSO TG functionality] loaded for the correct database (in correct environment) and SAML protocol enabled / certificates installed (backend, by Software Engineering team).

Workbench

Who does this: IC or CSC

SSO ERG Enablement

To enable SSO TG [ERG] functionality:

1. In Workbench, select client and go to Tools > Talent Gateways > Admin.
2. Select the [full] TG and click Edit.
3. Select SSO Talent Gateway = Yes and select the appropriate encryption key group. [Test plan does not say this, but I think it has to be an ERG as well.]
4. Click Save.
5. Synchronize changes with Talent Gateways.

Employee Referral History – Req ID Display

For better candidate referral tracking, candidate Referral History now displays the Req ID.

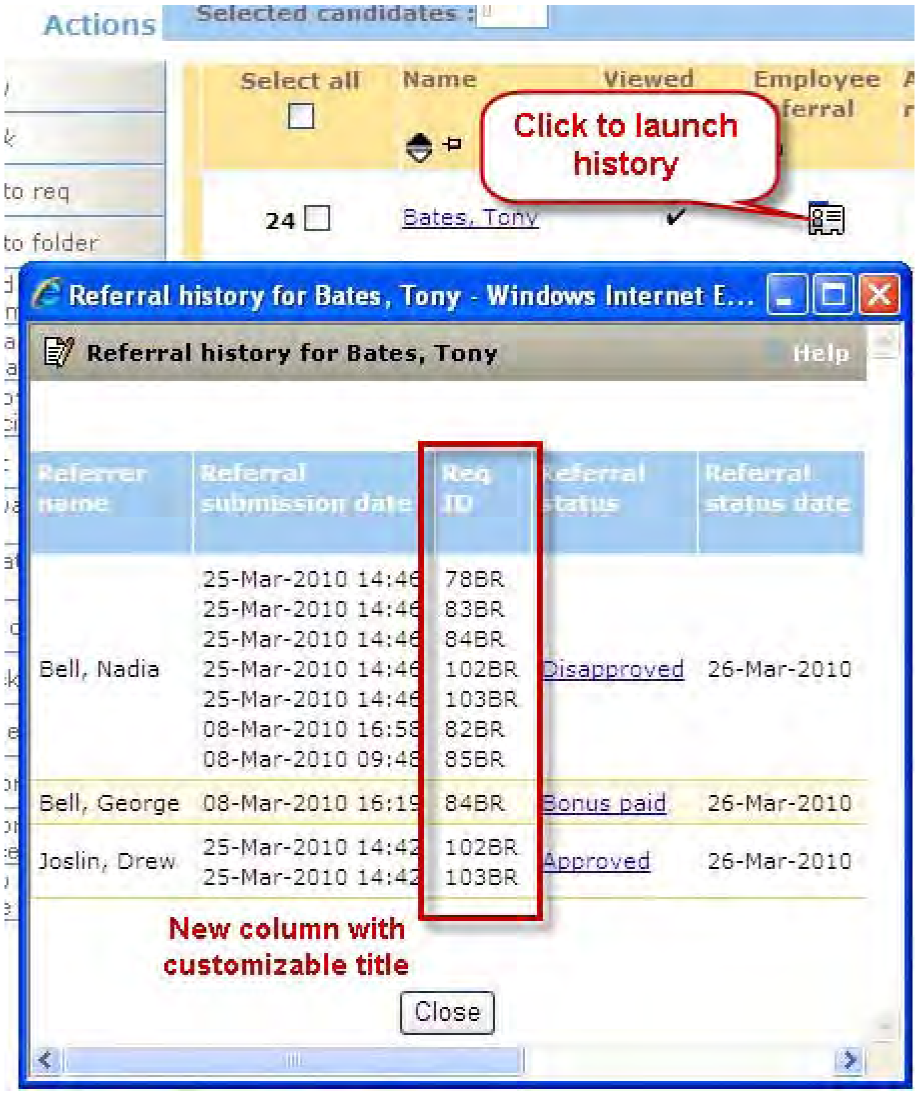
Date Available	US: 01/APR/2010 EU: 01/APR/2010
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☐ Workbench Self-Service ☐ New UI ☐ 2x BrassRing ☐ Talent Gateways ☐ Agency Manager ☐ Data Insight Tool ☐ SmartApproval
Visible Changes	☐ No – contact your CSC for implementation details. ☐ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☐ Specific conditions required – see details below. ☐ Configuration required – see details below.

Benefits

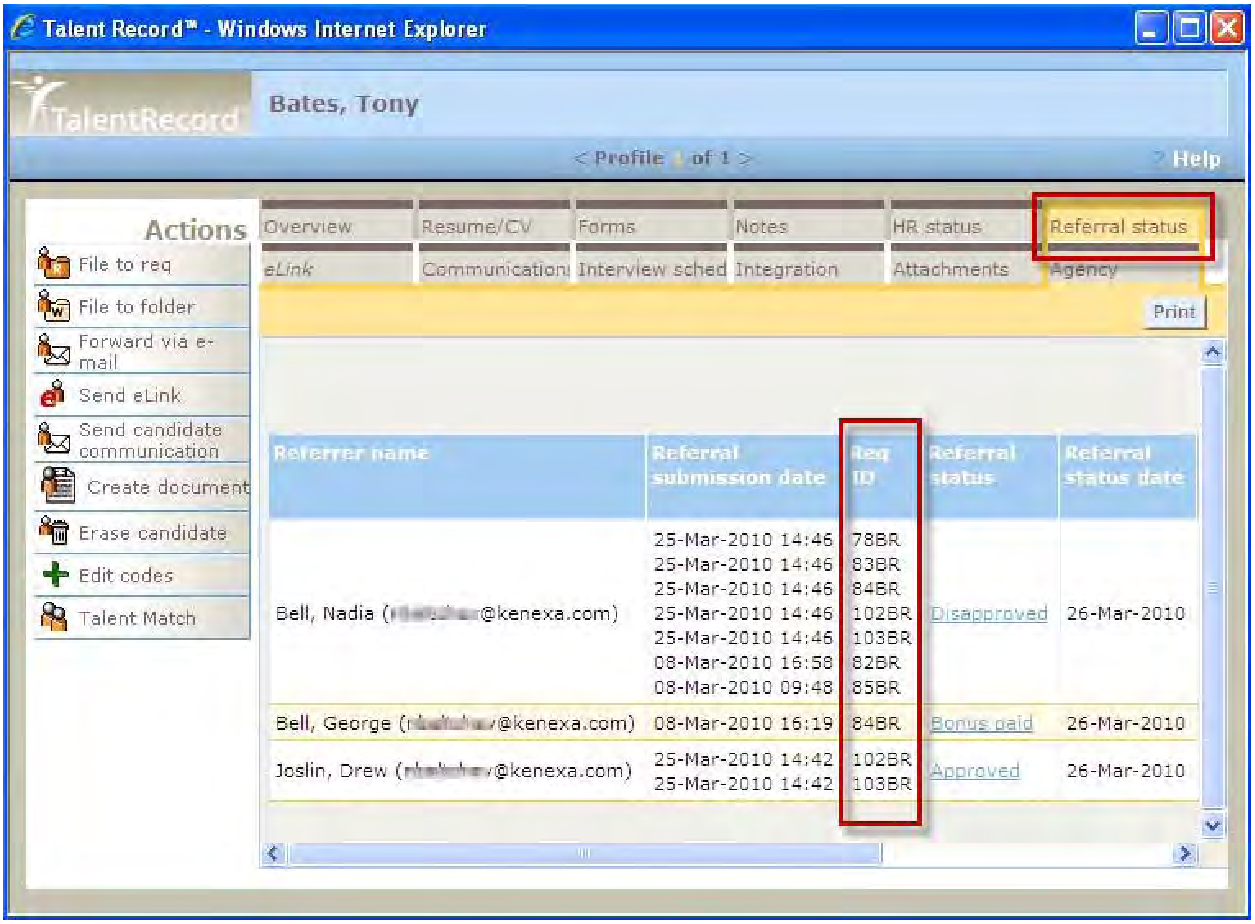
Users see at a glance the Req ID for which the candidate was referred.

Feature Description

Referral History now displays the Req ID for more convenient employee referral tracking. Referral History is shown in a pop-up window when 2xB users click the Employee Referral icon on a referred candidate's Talent Record. The column contains data only; the Req IDs are not active links to the reqs.



The column is also displayed on the **Referral status** tab of the Talent Record.



Limitations and Known Issues

The column contains data only; the Req IDs are not active links to the reqs.

How Do Clients Get this Feature?

This feature is available automatically without configuration.

Gateway Questionnaire Posting Preview

Recruiters can preview or review details of Gateway Questionnaires when they are in the process of posting a job requisition.

Date Available	US: 11/Mar/2010 EU: 17/Mar/2010
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product or Module	☐ Workbench ☑ Workbench – Clients ☑ 2x BrassRing - New UI ☑ 2x BrassRing - Classic ☑ Talent Gateways ☐ Agency Manager ☐ Data Insight Tool ☐ SmartApproval ☐ Candidate Export
Visible Changes	☑ No – contact your CSC for implementation details. ☐ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☐ Specific conditions required – see details below. ☑ Configuration required – contact your CSC for details.

Benefits

Recruiters can review Gateway Questionnaire questions on the spot and no longer have to remember the contents of different questionnaires.

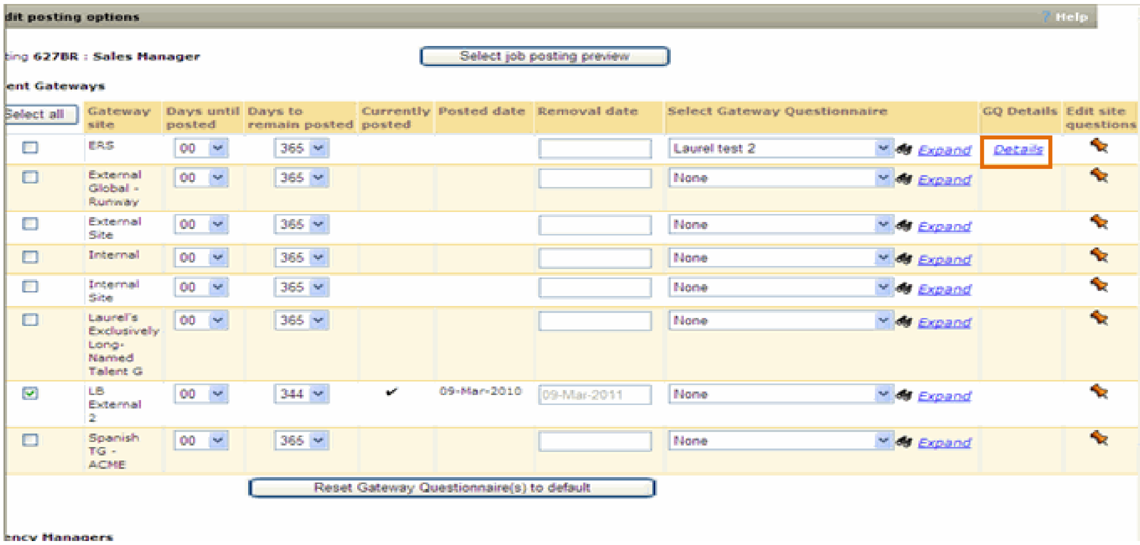
Feature Description

When this feature is enabled, the **Details** link displays in the Gateway Questionnaire column on the posting page. Clicking the **Details** link opens a new page displaying the GQ information in a tree format.

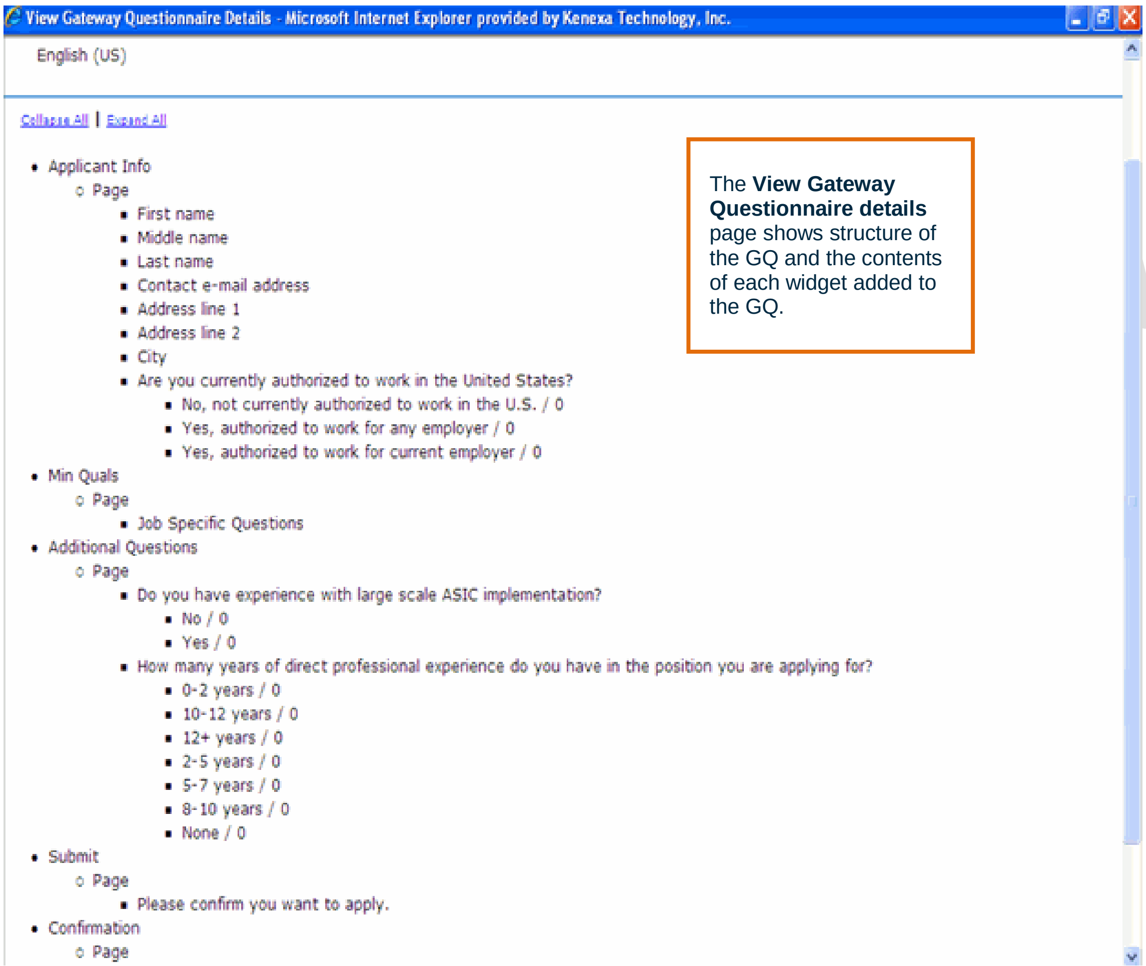
The procedure is:

1. Select the Gateway Questionnaire you want to preview. (The Details link becomes active when you select the GQ.)
2. Click the Details link in the **Select Gateway Questionnaire** column. The GQ details tree consists of the selections made when building the Gateway Questionnaire.

Important: No candidate responses are displayed. (Therefore, no masking of encrypted fields is required.)



3. The **View Gateway Questionnaire Details** page opens.



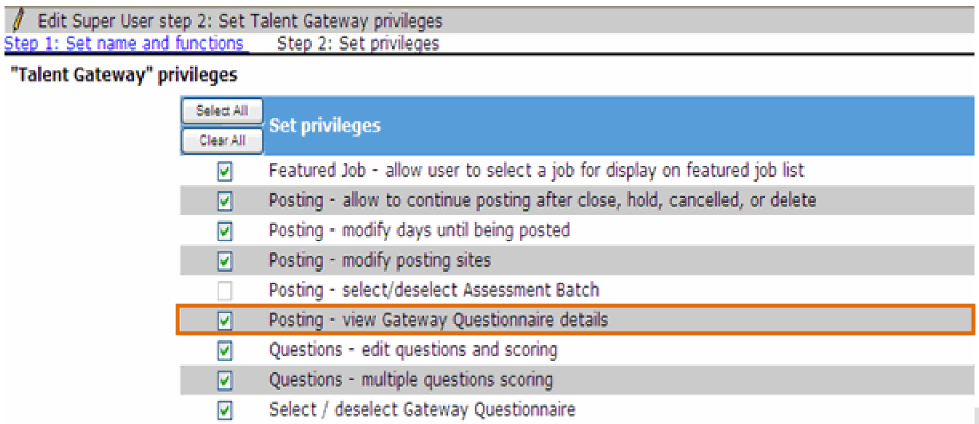
The **View Gateway Questionnaire details** page shows structure of the GQ and the contents of each widget added to the GQ.

How Do Clients Get this Feature?

Workbench Self-Service

Who does this: Certified Workbench User, Tier 2

Your certified Workbench user or Kenexa consultant must enable the new Talent Gateways user type privilege **Posting – view Gateway Questionnaire details** for 2xB user types who post requisitions. The privilege is unchecked (off) be default. It can be turned on or off at any time.



Gateway Questionnaires – JSQ Pass/Fail Branching

Your organization can now handle potential candidates differently based on whether or not they achieve the required minimum score for job-specific questions on a GQ.

Date Available	US: 17/DEC/2009 EU: 23/DEC/2009
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☑ 2x BrassRing New UI ☑ 2x BrassRing Classic ☑ Talent Gateways
Visible Changes	☐ No – contact your CSC for implementation details. ☑ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☑ Specific conditions required – see details below. ☐ Configuration required – see details below.

Benefits

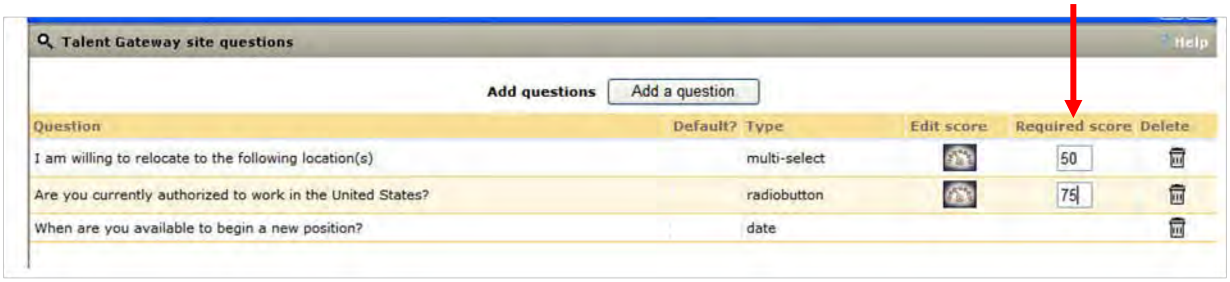
Pass/Fail branching streamlines the process for handling and communicating with potential candidates who either meet or fail to meet your minimum score requirements. It also provides the ability to report on Pass/Fail data for candidates.

Feature Description

Pass/Fail branching allows your organization to handle potential candidates differently based on whether or not they achieve the required score for job-specific questions on a GQ. You can:

- Select different destination pages of the GQ for potential candidates who achieve the required score (pass) or a lower score (fail) for job-specific questions. For example, you may direct failing candidates to a page that lets them know they have not met minimum requirements, while directing passing candidates to a section with further assessments.
- Select a TG form field to store results of the JSQ questions, either Pass or Fail. Results are added to the form field, and displayed on the Job Response form and Talent Gateway Form, but not shown to candidates.
- Prevent the filing of “failed” candidates to the req. (Pass/Fail criteria is determined by the Required Score found on the Edit Site Questions page.)

2xB users set the required score for a requisition's job-specific question (from the req select **Edit posting options** > **Edit site questions**).



Certified Workbench users who set up the GQ pages can select the branching options for those who pass or fail the questions.

How Do Clients Get this Feature?

This feature is available automatically without configuration.

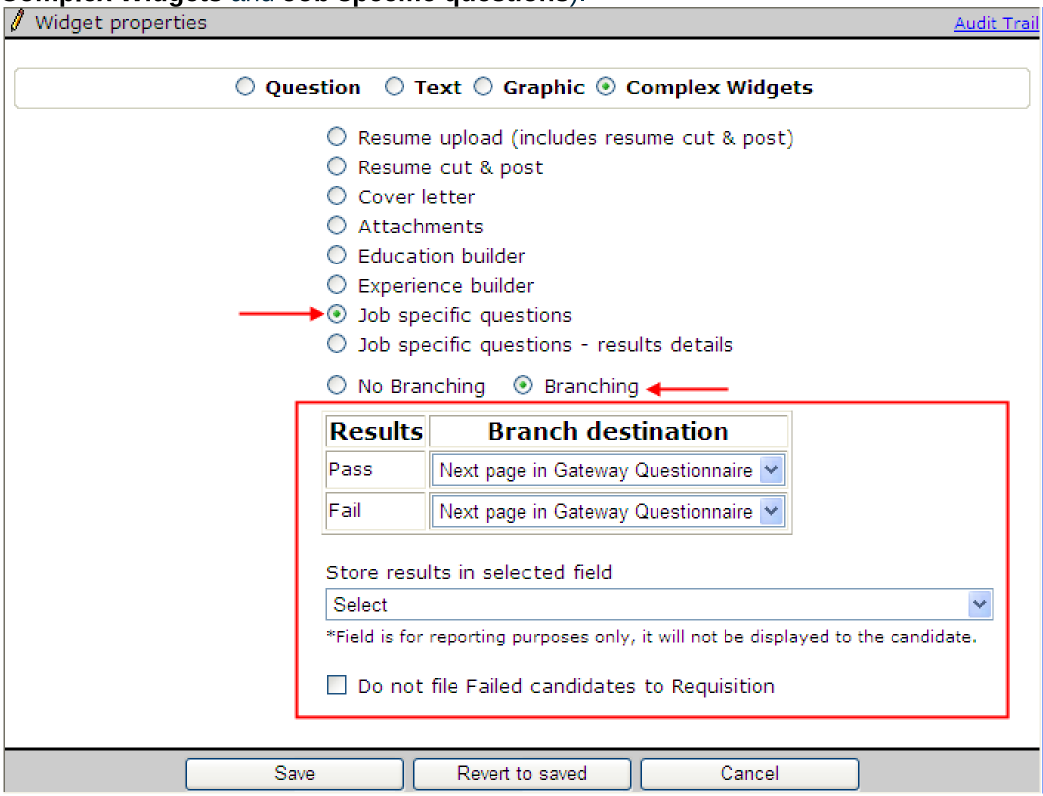
Workbench Self-Service

Who does this: Certified Workbench User, all tiers

To enable score branching in Workbench, you must select the **Branching** option for Job Specific Questions widgets for pages for which you desire branching.

1. Select **Tools > Gateway Questionnaire**.
2. Click **Administer sections/pages** icon for the GQ for which you are enabling Pass/Fail branching.
3. Click **Administer widget**s icon for the desired section/page.
4. Select the J**ob specific questions** widget to edit, or add it if necessary (double-click on a region or click **Add new widget** in the Actions toolbar. On the **Widget properties** screen that opens, click

Complex Widgets and **Job specific questions**).



5. Click **Branching** (current behavior remains the same with **No Branching** selected).
6. In the boxed **Results** and **Branch destination** grid area, select the GQ pages to which passing and failing candidates should be sent.
7. To store the results of the JSQ questions, either Pass or Fail, select a TG form text field. The results are added to the form field and displayed on the Job Response form Talent Gateway Form, but not shown to candidates.
8. To prevent candidates who fail to pass the JSQ questions from being filed to the req, check **Do not file Failed candidates to Requisition**. (Pass/Fail criteria is determined by the Required Score found on the Edit Site Questions page.)
9. Click **Save**.

Business Rules

Candidates who fail the JSQ and are not filed to the req will be allowed to reapply (so long as ReqAllowReapplies is set to **Yes**).

Candidates who pass the JSQ but are processed as an Incomplete Submission and saved in 2xB are are not filed to the req. However, they will be allowed to reapply (so long as ReqAllowReapplies is set to **Yes**).

Candidates who Pass the JSQ and complete their submission are filed to the req.

If branching is enabled, no additional branching is allowed on the page.

Gateway Questionnaires: Preventing Empty Submissions

Several improvements help prevent incomplete submissions when candidates are completing Gateway Questionnaires (GQs):

- Only the GQ Previous button allows candidates to return to a previous page.
- Gateway Questionnaires now display a “Wait” indicator while candidates’ page or form submissions are in process.
- GQ Back, Next, Home, and navigation buttons are disabled during submission or in case of an error.

Date Available	US: 01/APR/2010 EU: 07/APR/2010
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☐ Workbench Self-Service ☐ New UI ☐ 2x BrassRing ☑ Talent Gateways ☐ Agency Manager ☐ Data Insight Tool ☐ SmartApproval
Visible Changes	☑ No – contact your CSC for implementation details. ☐ Yes – see the cumulative Visible Changes document sent out for each build in the release.
How Do I Get this Feature?	☑ Automatic – see details below. ☐ Specific conditions required – see details below. ☐ Configuration required – see details below.

Benefits

This feature should prevent or reduce the problem of incomplete form submissions from candidates.

Feature Description

In the past, candidates have been able to create incomplete form submissions for the same job application while modifying form data during the GQ application process. The result of clicking “Back” and “Next” or using browser/keyboard “Go Back” functionality to modify a previous form page can result in incomplete forms being submitted to the candidate’s Talent Record.

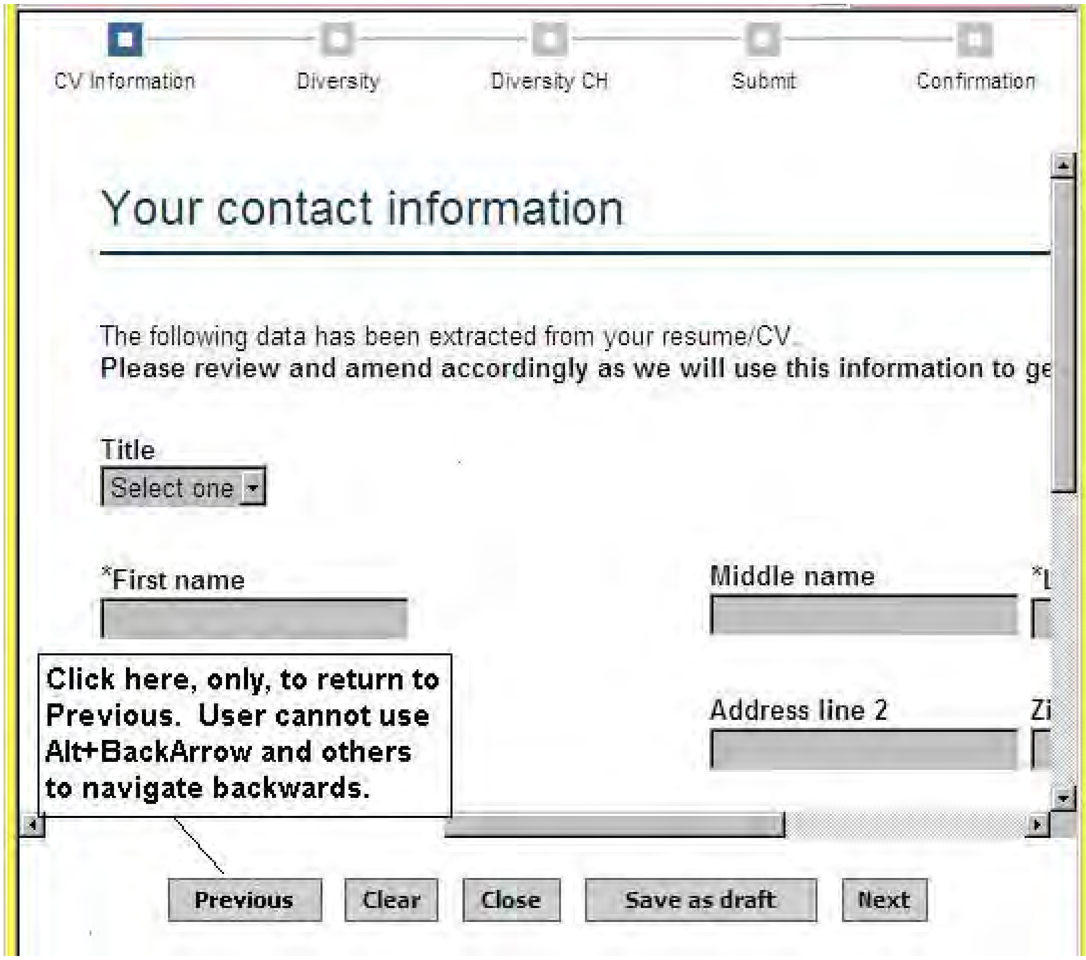
This new functionality:

- Prevents candidates from going back to a previous page during the GQ application process except by using the Previous button.
- Displays a “Wait” indicator if the action takes longer than expected after candidates have clicked Next, Submit or Save as Draft, to alert them that they must wait until their page or form submission is complete.
- Disables the GQ Previous/Next buttons while candidates are submitting form data (disables whatever buttons are configured as Back or Previous and Forward or Next).

- Disables Home, Back, or Next buttons and the GQ navigation buttons at the bottom of the window when a system error occurs.

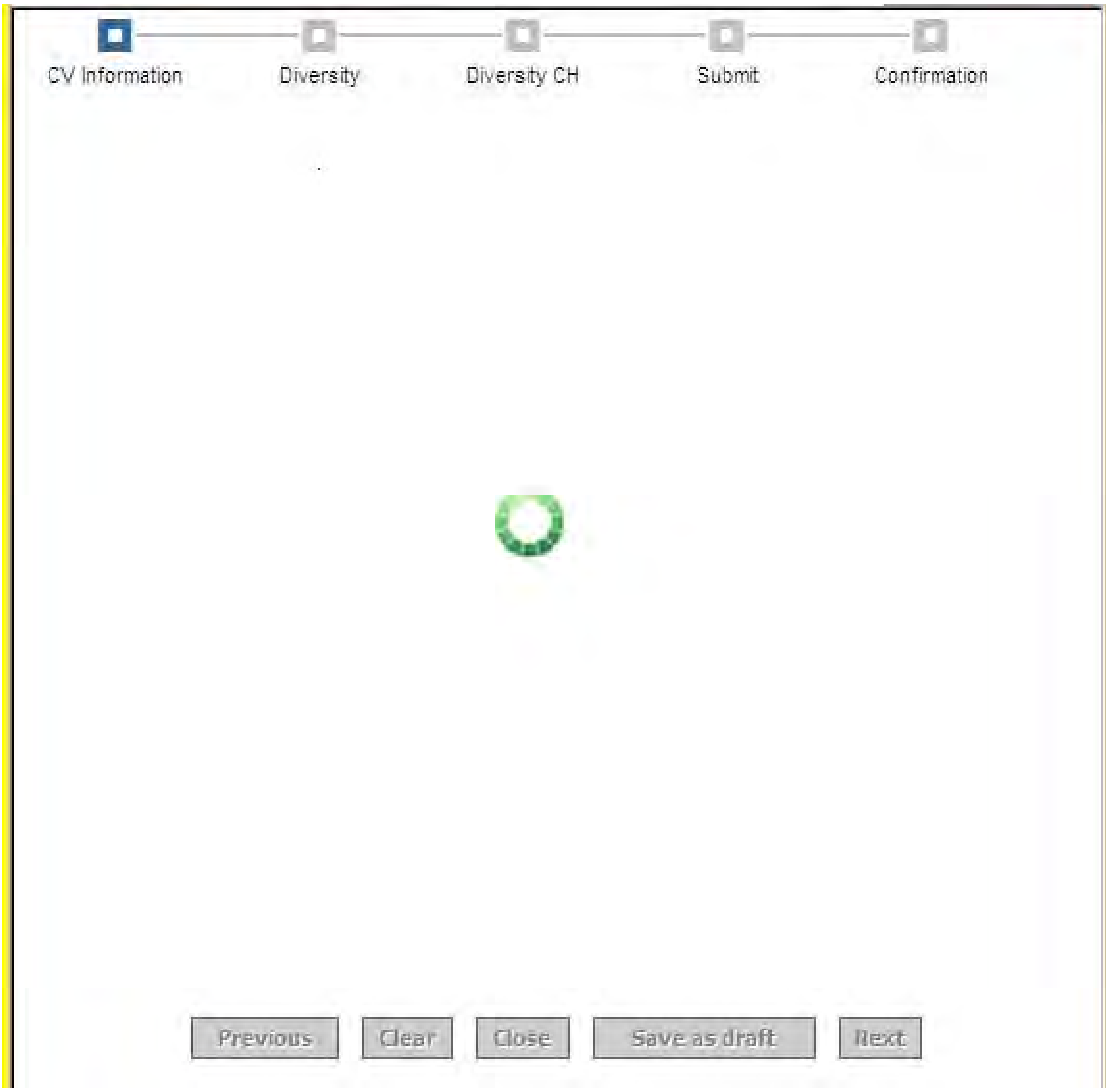
Previous Button Required for Previous Page

Key or button navigation to the previous page during a GQ application, except by using the GQ Previous button, is completely disabled once the candidate begins filling out a GQ form.



Wait Indicator and Disabled GQ Previous and Next Button Navigation

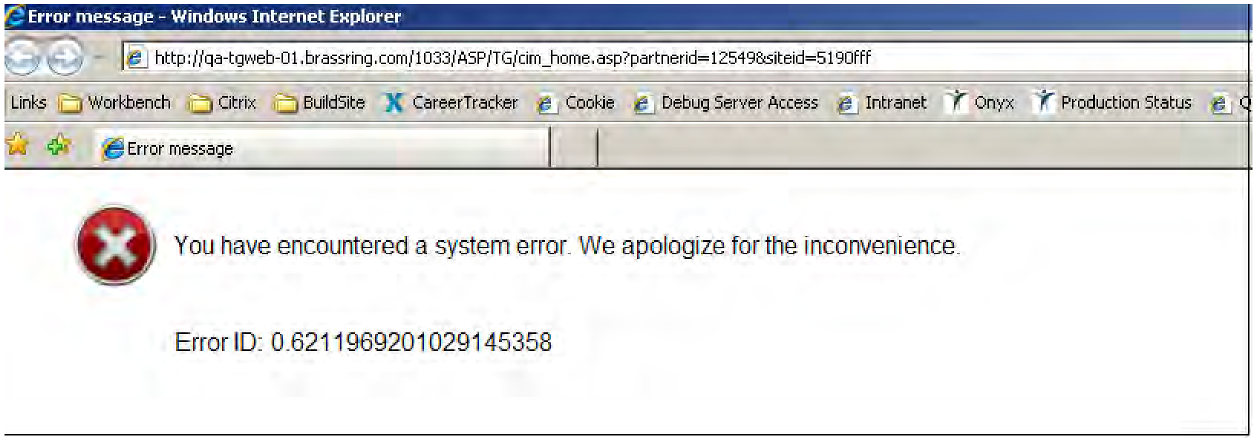
When candidates apply to a job with a GQ, begin filling out the GQ form, and then click **Submit**, **Next** or **Save as Draft**, the following figure shows the indicator and disabled GQ Previous and Next navigation buttons.



Disabled Buttons after Error

If a system error occurs, the GQ Back and Home buttons are hidden, and the GQ navigation buttons at the bottom of the screen are disabled.

User Interface:



Limitations and Known Issues

The following buttons will not be involved in this new functionality:

- Preview (for Resume/Cover letter)
- View Saved Draft
- Continue (from Saved draft)
- Continue (from Login page)
- Continue (for Assessments)
- Close (with close confirmation text)
- Close (without close confirmation text)

How Do Clients Get this Feature?

This feature is available automatically without configuration.

Gateway Questionnaires – Processing Incomplete Submissions

Your organization can now configure the ability to capture and store data within 2x BrassRing for candidates who do not complete their job submission after answering minimum qualification questions on Gateway Questionnaires.

Date Available	US: 17/DEC/2009 EU: 23/DEC/2009
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☐ Workbench Self-Service ☑ 2x BrassRing New UI ☑ 2x BrassRing Classic ☑ Talent Gateways
Visible Changes	☐ No – contact your CSC for implementation details. ☑ Yes – see the cumulative Visible Changes document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☑ Specific conditions required – see details below. ☐ Configuration required – see details below.

Benefits

This feature provides a means of better communicating to candidates why they are not moving forward in the application process. It also ensures adverse impact analysis can be done on all applicants rather than only those who successfully complete the application after responding to the questions.

Feature Description

You can capture and store data within 2xB for candidates who do not complete their job submission after answering minimum qualification questions on Gateway Questionnaires. A designated text form field is used to track whether applicants completed their submission for a position after completing GQ questions, or cancelled prior to submission. This field is used only when a new GQ page property, **Process Incomplete Submission,** is enabled for one or more completed pages in the GQ.

Certified Workbench users who set up the GQ pages can turn the option on and designate the tracking form field, and 2xB users then see the results on the candidate's Talent Gateway form and the Job Response Form. For a processed incomplete submission, the form field shows "Incomplete Submission." The field is blank for those candidates who fully submit.

How Do Clients Get this Feature?

This feature is available automatically, but requires that:

- **Process Incomplete Submission** GQ page property be enabled for one or more pages in the GQ.

- **Field Used to Track Complete vs Incomplete Submissions** be selected on the Gateway Questionnaire properties page.

Workbench Self-Service

Who does this: Certified Workbench User, all tiers

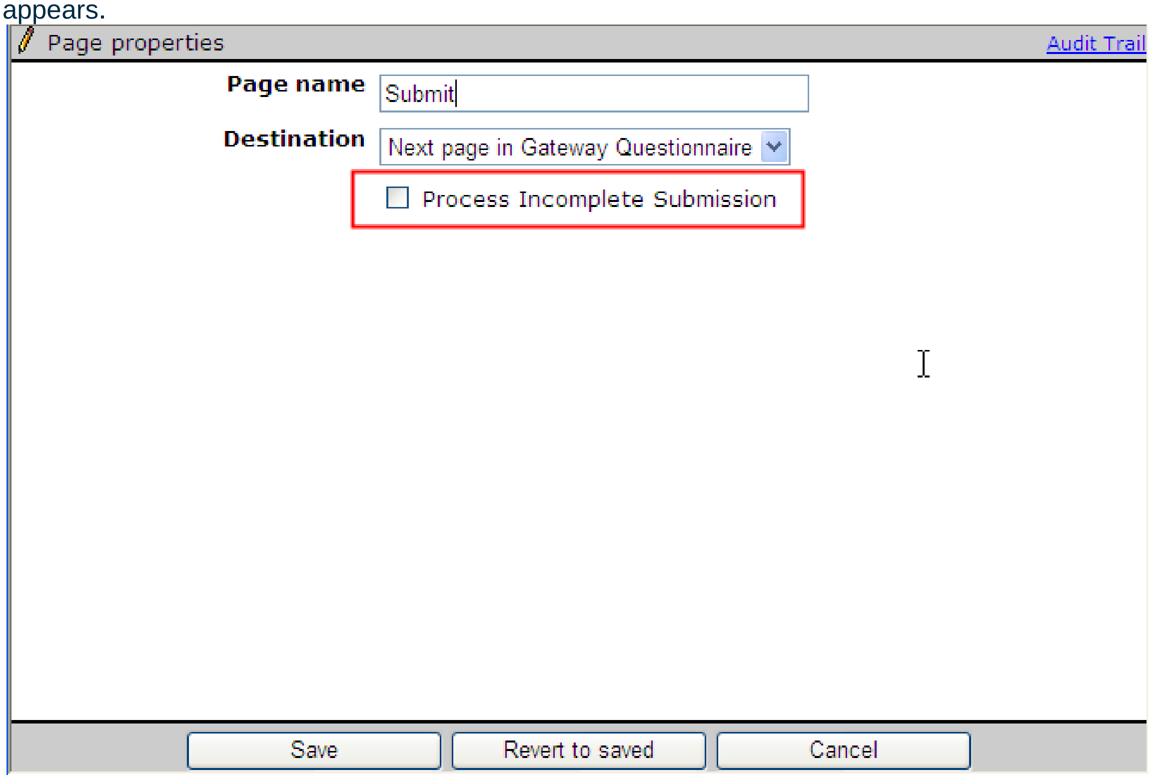
With the Process Incomplete Submission feature, you can capture and store data within 2xB for candidates who do not complete their job submission after answering minimum qualification questions on Gateway Questionnaires. When enabled, the system captures the candidate's data and sends it to 2xB regardless of whether the candidate completes their full submission. The candidate must click **Next**, **Previous**, or **Save draft** after entering their data on the page. If they quit prior to clicking one of these buttons, that page data is lost.

To turn on the feature in Workbench, you:

- Enable the GQ page property
- Select the tracking field

To enable the GQ page property:

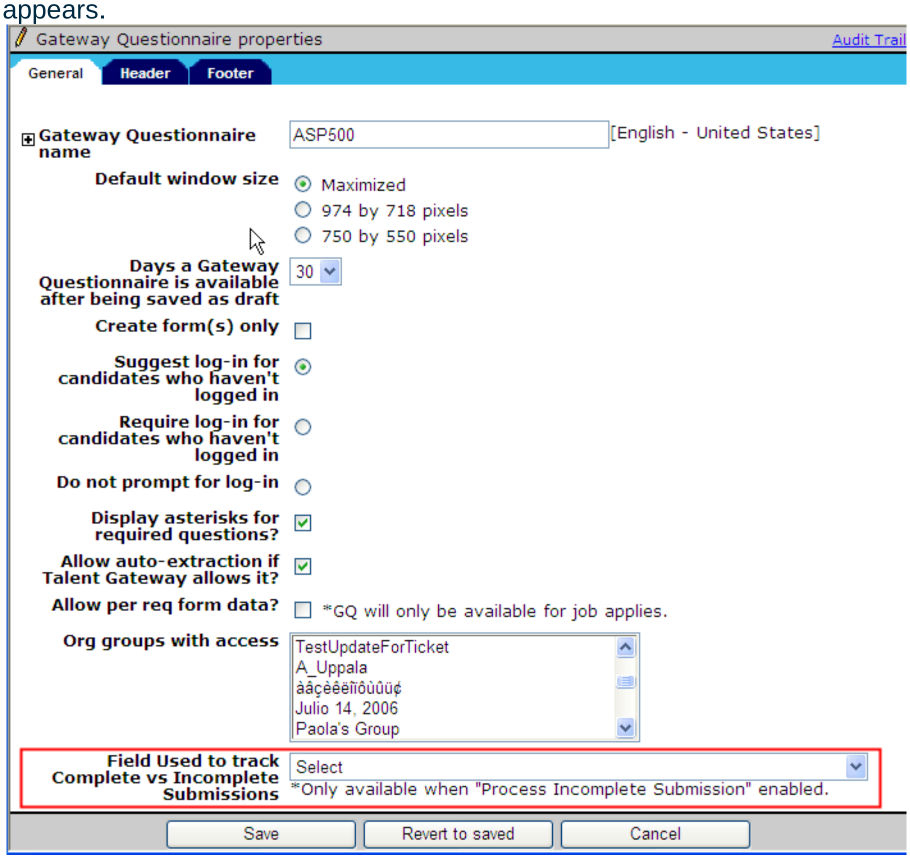
1. Select **Tools > Gateway Questionnaire**.
2. Click **Administer sections/pages** icon for the GQ you are editing (or add a new section).
3. Select a page and click its **Edit properties** icon (or add a new page). The GQ **Page properties** page appears.



4. Check **Process Incomplete Submission**.
5. Click **Save**.

To select the tracking field:

1. Select **Tools > Gateway Questionnaire**.
2. Click **Edit Properties** icon for the GQ you are editing. The **Gateway Questionnaire properties** page appears.



3. Select a tracking field for **Field Used to Track Complete vs Incomplete Submissions** All text fields from your organizations TG forms are available
4. Click **Save**.

Business Rules

When an applicant enters data and clicks **Next**, **Previous**, or **Save as Draft**, the information is stored in a temporary table. When the applicant completes the submission, the data is removed from the table once processed. A utility retrieves partial submission data older than 24 hours (except data “Saved as Draft”).

Incomplete submissions are not filed to the Req for which the applicant initially started to apply. They are stored both on the Job Response form and the Talent Gateway form, following the ordering logic that is in place.

Data “Saved as Draft” is retrieved after 7 days and pushed into 2xB, but not filed to the Req folder.

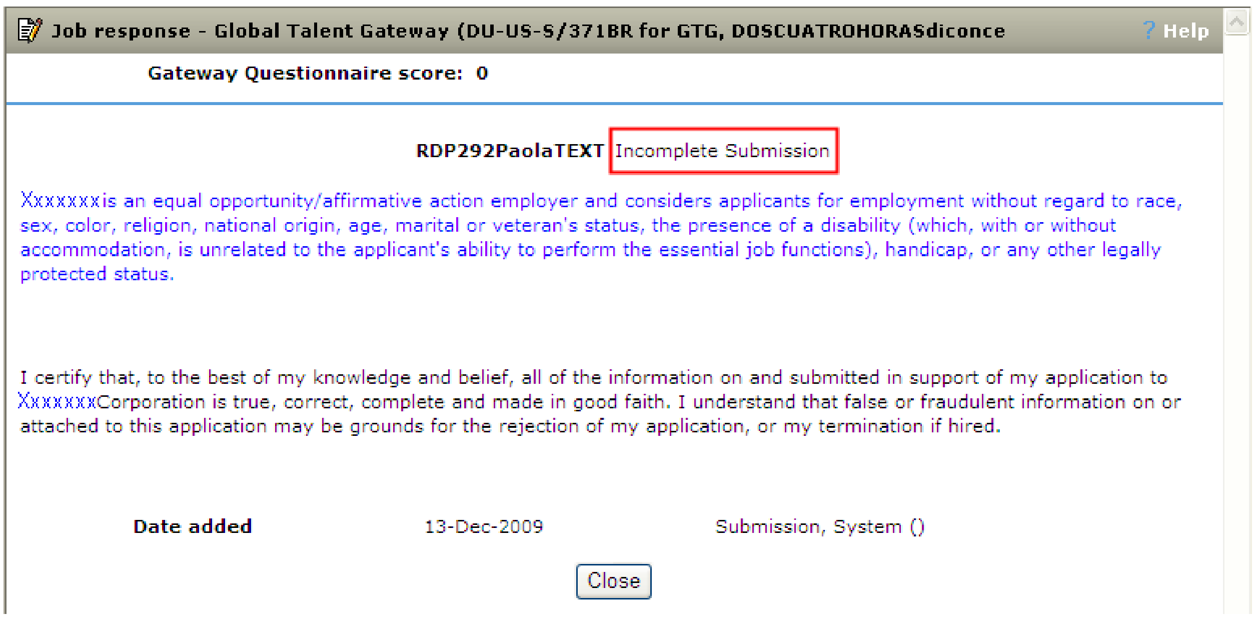
If the candidate has a TG profile, that data is also sent with the processed incomplete submission.

Best Practice Recommendations

Build the GQ so that all required stacking information precedes Process Incomplete Submission pages. Otherwise, information necessary to process the incomplete submission (such as contact data) may not be available, resulting in lost submissions.

2x BrassRing User

When the feature is enabled, 2xB users see the results on the candidate's Talent Gateway form and the Job Response Form. The field is blank for those candidates who completed their submission. For a processed incomplete submission, the form field shows "Incomplete Submission."



Gateway Questionnaires – Providing Candidates with JSQ Results

Your organization can now provide candidates with the details of how they scored on each of a GQ's job-specific questions.

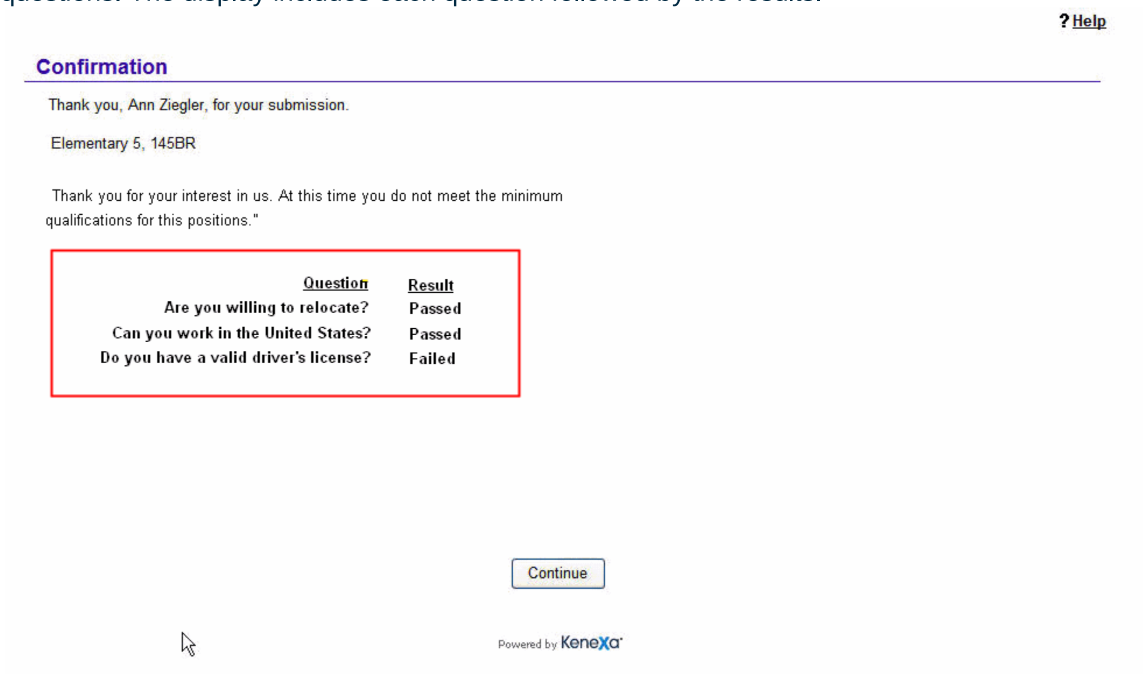
Date Available	US: 17/DEC/2009 EU: 23/DEC/2009
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☐ Workbench Self-Service ☑ New UI ☑ 2x BrassRing ☑ Talent Gateways ☐ Agency Manager ☐ Data Insight Tool ☐ SmartApproval
Visible Changes	☐ No – contact your CSC for implementation details. ☑ Yes – see the cumulative Visible Changes document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☑ Specific conditions required – see details below. ☐ Configuration required – see details below.

Benefits

Score results provide another means for communicating with potential candidates about their job application.

Feature Description

Your organization can choose to display to applying candidates their Pass/Fail results for job-specific questions. The display includes each question followed by the results.



To display results, Certified Workbench users who set up the GQ pages add the **Job specific questions – results details** widget for any desired pages of the GQ.

Best Practice Recommendations

You should use Pass/Fail branching in conjunction with displaying job-specific question results to candidates. That way you can present appropriate text and options based on whether the candidates have passed (and will be proceeding further in the selection process) or have failed (and may not be continuing).

How Do Clients Get this Feature?

The **Job specific questions – results details** widget is available automatically. To display results, the results widget must be added to appropriate pages of the GQ.

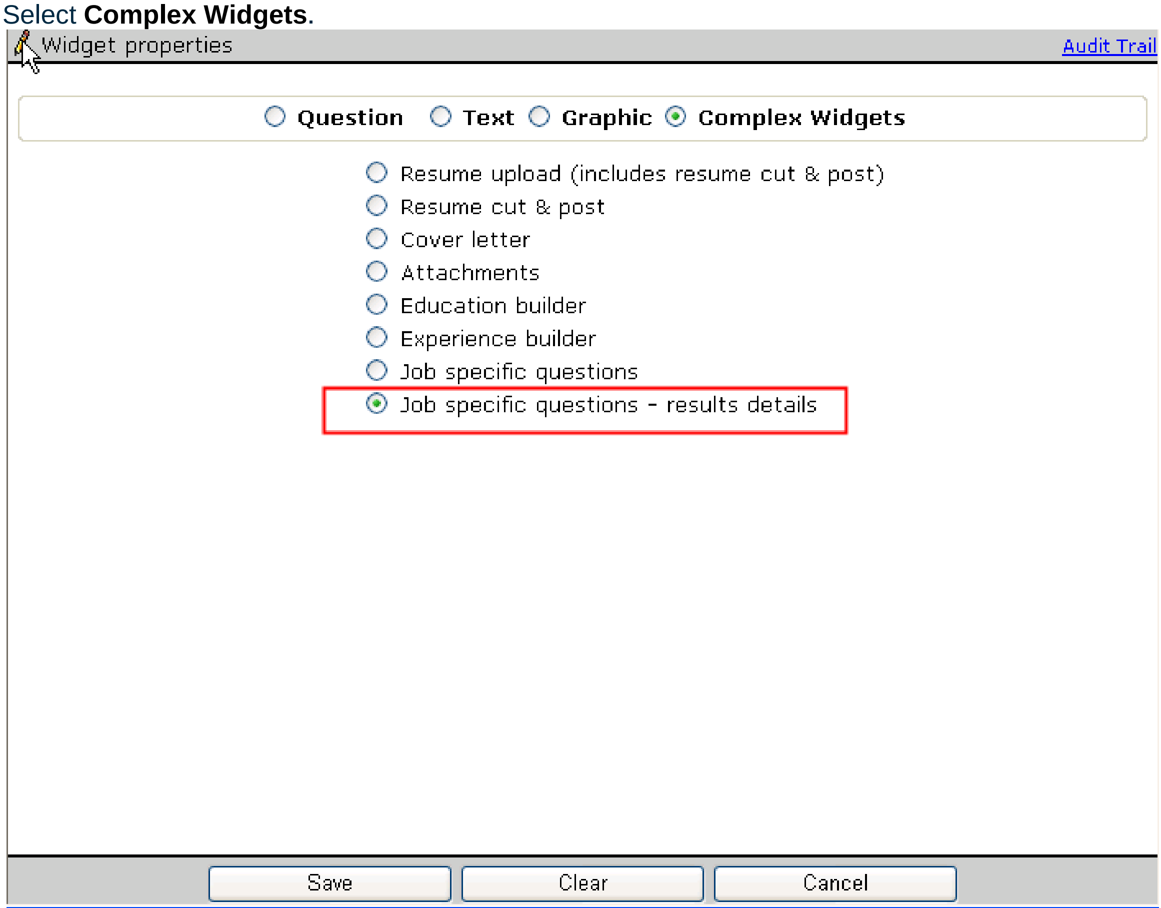
Workbench Self-Service

Who does this: Certified Workbench User, all tiers

To enable the display of job-specific question results for candidates, in Workbench you must place the **Job specific questions – results details** complex widget *after* a **Job Specific Questions** widget for the desired GQ pages. (For any path, the results widget must be preceded by a **Job specific questions** widget.)

To add the results display widget:

1. Select **Tools > Gateway Questionnaire**.
2. Click **Administer sections/pages** icon for the GQ for which you are enabling the results display.
3. Click **Administer widget**s icon for the page.
4. To add the **Job specific questions – results details** widget, either double-click on a region or click **Add new widget** in the Actions toolbar. The **Widget properties** screen opens.
5. Select **Complex Widgets**.



6. Select **Job specific questions – results details**.
7. Click **Save**.

Business Rules

Job specific questions – results details complex widget can only be placed after the **Job Specific Questions** widget. It can be placed on any page in the path after the JSQ widget.

Block Update to HR Status until Forms are Approved

Customers can block the ability for 2x BrassRing users to update a candidate to one or more designated HR statuses if the specified candidate form(s) are not attached. Now customers using that feature can also block the update if any of the specified forms require approval and have not yet been approved.

Date Available	US: 17/DEC/2009 EU: 23/DEC/2009
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☑ 2x BrassRing New UI ☑ 2x BrassRing Classic
Visible Changes	☑ No – contact your CSC for implementation details. ☐ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☐ Specific conditions required – see details below. ☑ Configuration required – see details below.

Benefits

This enhancement lets clients be sure that all necessary information is not only completed, but approved by appropriate parties, prior to moving to the next step in the process.

Feature Description

Your organization may require certain information to be on file for candidates prior to moving them forward in the hiring process (for example, an application, background screening, or assessments) and into an HR Status that will trigger a candidate export. An HR Status attribute is available that causes the system to block an update to the status if required forms are not present.

With this enhancement, if that **Block HR Status update when selected form(s) are not attached** attribute is set for your account, you can also block the update to the HR status if any of the specified forms require approval but do not have a status of Approved. To do so, after Kenexa staff set the attribute and specify the required forms, they also check **Forms requiring approval need to be in an 'Approved' status**. (You can use this feature even if none of the forms selected currently requires approval.)

At the same time, you may want to have Kenexa edit the error message text the system displays to 2xB users attempting an HR Status update when required forms are not attached. The default text is:

Error: Form(s) [insert form name(s)] **are required for the selected HR Status. Candidate(s) missing the required forms may not be updated at this time.**

You could substitute text similar to this so that the message will reflect the additional requirement that forms be approved:

Error: Form(s) [insert form name(s)] **are required for the selected HR Status. Candidate(s) missing the required forms or form approvals cannot be updated at this time.**

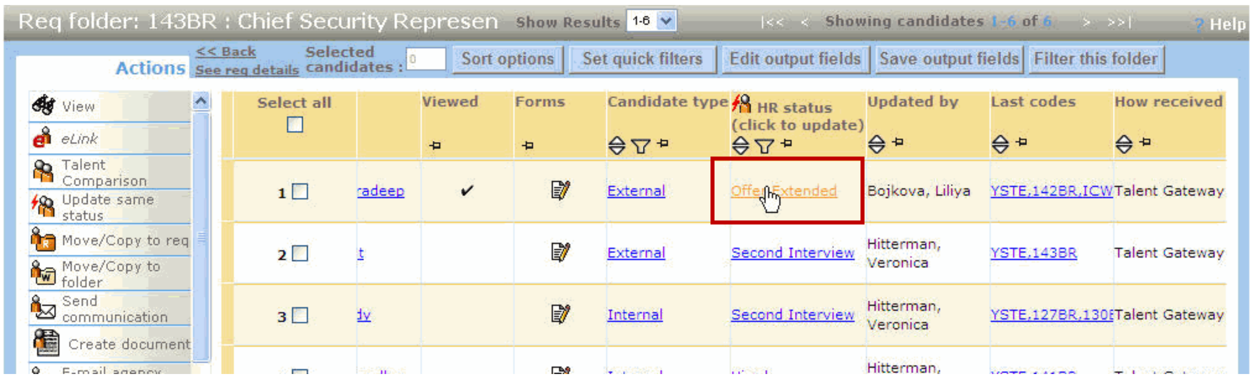
Note that all the required forms are listed in the error message, not just those that are missing or unapproved.

Updating Candidates in 2xB

2xB users have several ways to update HR Statuses for one or multiple candidates in both the new UI and classic 2xB.

Updating HR Status for a Single Candidate

Click to update HR status for one candidate from a folder:



--OR—

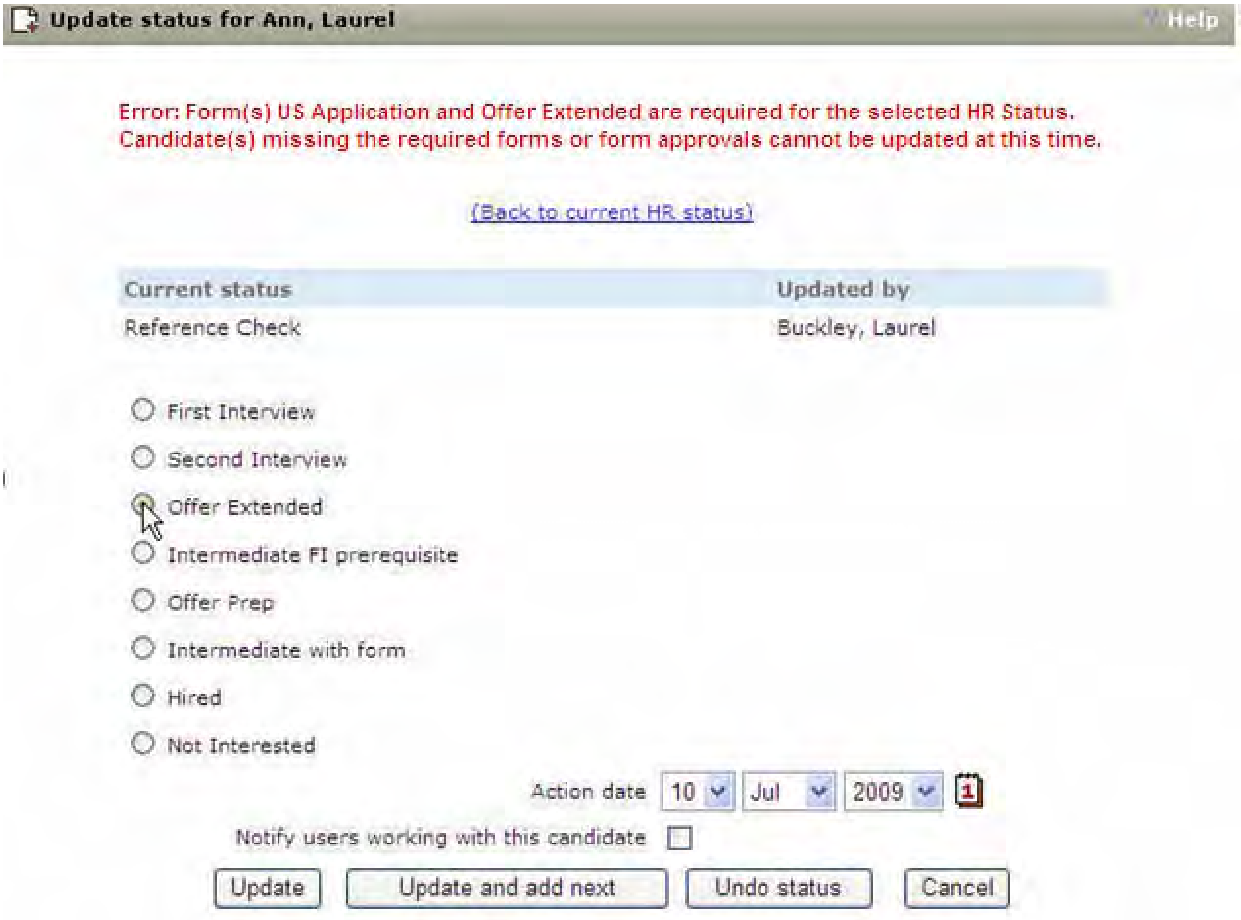
Click to update HR status from the Talent Record:

With the “Block update” attribute and approval requirement enabled, the following rules apply everywhere that 2xB users can update the HR status for a single candidate:

When you click **Update** or **Update and add next**, the **Update status** window displays with the selected candidate. The system checks whether:

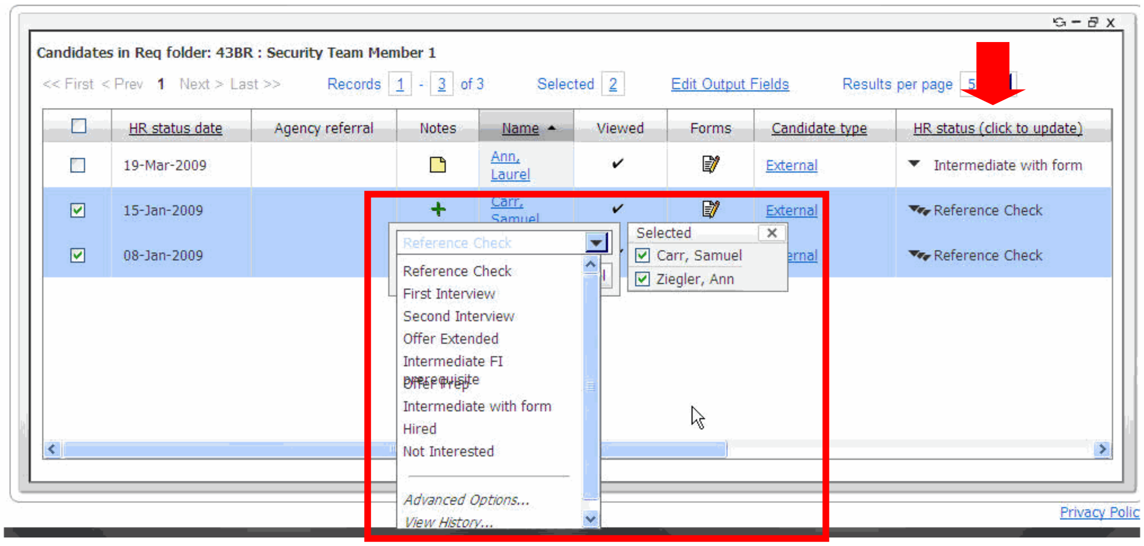
- The required forms (according to the HR status setup) are attached.
- Any forms requiring approval have an approval status of **Approved**.

If a candidate does not have all the required forms, or if a form's approval status is anything other than **Approved**, such as **Pending** or **Declined**, the update is not performed. The candidate is de-selected and 2xB displays the error message.

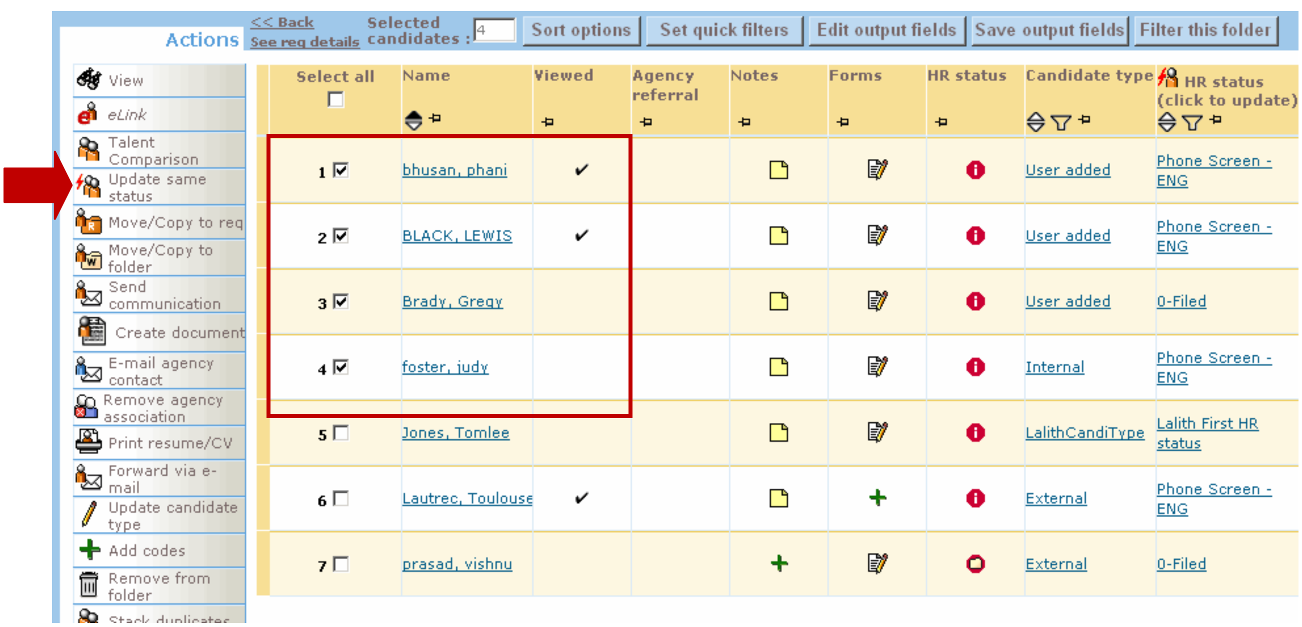


Updating HR Status for Multiple Candidates

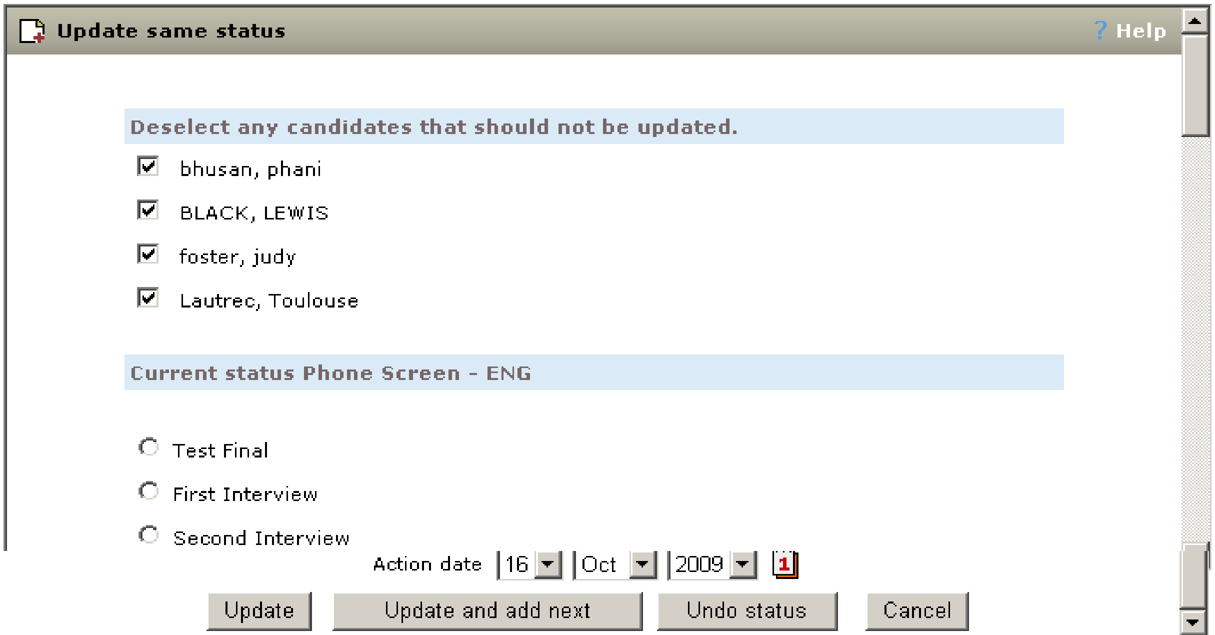
Both in the new UI and in Classic 2xB, users can select multiple candidates with a matching HR Status and select an action to update all to a new HR Status. In the new UI, users see a screen similar to the following when updating the same status for multiple candidates:



In classic 2xB, users see the following:



For either interface, the user is brought next to the **Update same status** confirmation screen.



With the "Block update" attribute and approval requirement enabled for the HR Status, the system checks whether:

- The selected HR status is associated with a Candidate Export. If it is, the system blocks the action and displays the following error message to the user.
  "**This HR Status is associated with a candidate export process and can only be used during a single candidate update**.
- The required forms (according to the HR status setup) are attached. When the 2xB user is taking action *outside the req folder*, the system checks only for *single-per-candidate forms* (no checking for single-per-candidate/per-req forms, since if such a form is required, users can perform an HR Status update within a Req folder only).
- Any forms requiring approval have an approval status of Approved.

  If a candidate does not have the required forms, or if a form's approval status is anything other than **Approved**, such as **Pending** or **Declined**, the update is not performed. The candidate is de-selected and 2xB displays the error message:
  Error: Form(s) [insert form name(s)] **are required for the selected HR Status. Candidate(s) missing the required forms may not be updated at this time.**

Limitations and Known Issues

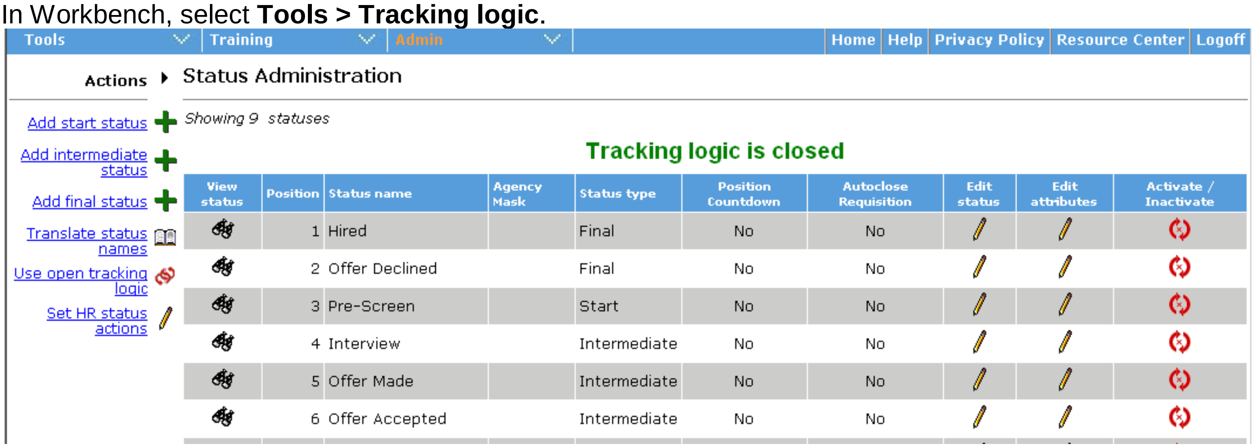
The default text on the "Block HR Status update when selected form(s) are not attached" error message is not automatically updated when accounts enable the requirement that forms need to be in an Approved status.

Another feature, **Update HR Status across Reqs when Hired**, automatically updates candidates that have been hired into a final status across any additional Reqs to which they are filed. This provides a means to ensure that any candidate who is hired is taken out of consideration for other Reqs. It is enabled through an Automation Manager trigger (Disposition Hired Candidates across all Reqs), If the HR status selected for a status update has the restriction "**Forms requiring approval need to be in an 'Approved' status**" checked, the restriction will be ignored when candidates are updated to this status via the Automation Manager trigger.

How Do Clients Get this Feature?

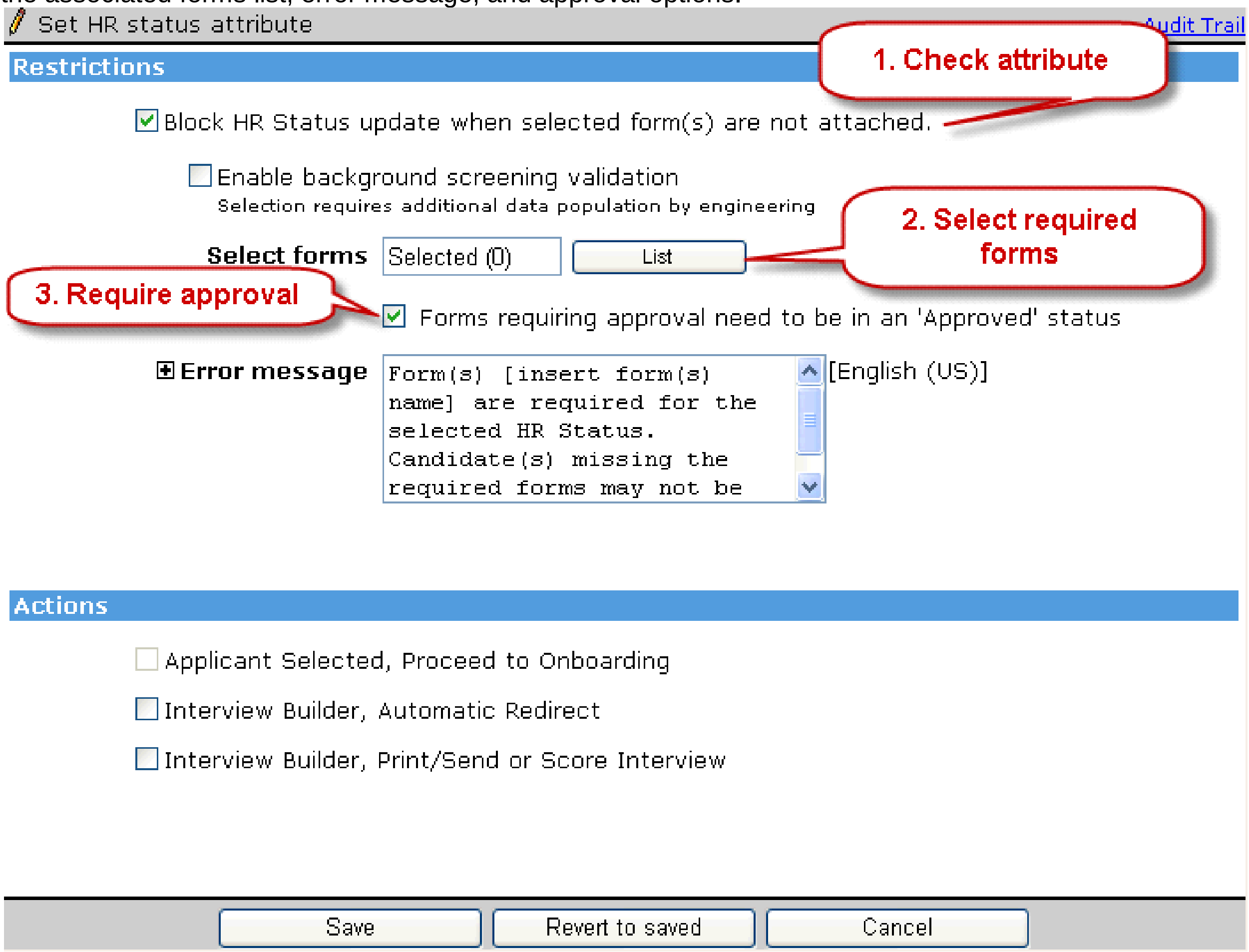
This feature is controlled by an option on the HR Status attribute **Block HR Status update when selected form(s) are not attached**. Please contact your CSC for more information about enabling this feature.

1. In Workbench, select **Tools > Tracking logic**.

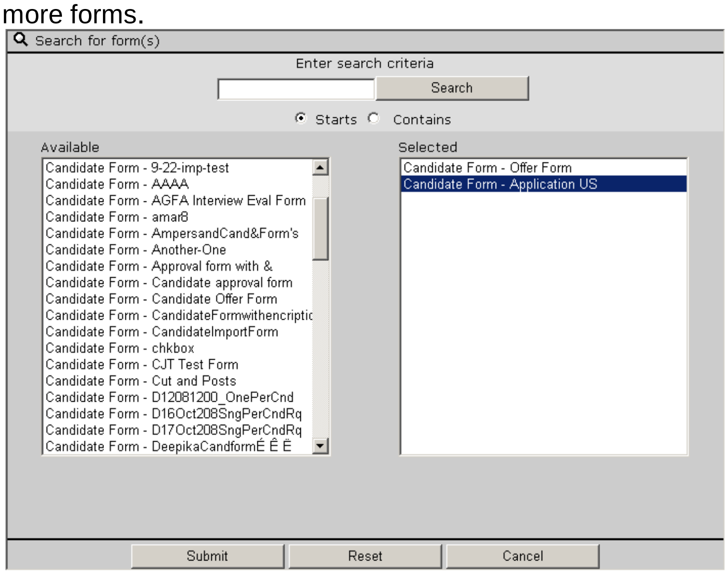


2. On the **Status Administration** page, click the pencil icon in the **Edit attribute** column for an HR status for which you want to block updates when forms are missing or unapproved. The **Set HR Status attributes** page displays.

3. Check the setting **Block HR Status update when selected forms are not attached**. This activates the associated forms list, error message, and approval options.



4. Click **List** to search for and select one or more forms that must be present and approved for candidates to be updated to this HR status. In the **Search for form(s)** window that lists all active single-per-candidate and single-per-candidate/per-req forms for your organization, select one or more forms.



5. To require form approval for the update, check **Forms requiring approval need to be in an 'Approved' status**.
6. You can customize the error message (and any translations) to be displayed when forms are missing, and it is recommended that you do so if also requiring the forms to be approved. The default error message text is for all applicable languages, but does not mention the approval requirement.
7. Click **Save** when you are finished. Workbench updates the HR status attributes and error message text (if applicable).

Background Check Vendors

HireRight

Customers can use HireRight, the background screening vendor. This integration uses the Background Check Common Service, implemented in late 2009.

Feature Summary Grid

Date Available	US: 11/Mar/2010 EU: 17/Mar/2010
Cost	☐ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☑ 2x BrassRing New UI ☑ 2x BrassRing Classic
Visible Changes	☑ No – contact your CSC for implementation details. ☐ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☐ Specific conditions required – see details below. ☑ Configuration required – contact your CSC for details.

Sterling

Customers can use Sterling as a background screening vendor. This integration uses the Background Check Common Service, implemented in late 2009.

Date Available	US: 01/Apr/2010 EU: 07/Apr/2010
Cost	☐ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☑ 2x BrassRing New UI ☑ 2x BrassRing Classic
Visible Changes	☑ No – contact your CSC for implementation details. ☐ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☐ Specific conditions required – see details below. ☑ Configuration required – contact your CSC for details.

Integrations: Kenexa Mapping Tool Overview

Integration Automation supports the seamless exchange (import and export) of multiple categories of data between 2x BrassRing and client information systems. As a new offering, customers can purchase *Integration Projects*, consisting of one or more *Integration Types*. The available integration types are:

Imports
Foundation data import (requisitions)
Foundation data import (candidates)
Job Code Default Data import
Req import
User data import
Form data import
HR status update
Candidate import
Single Sign On

Exports
Kenexa schema
Kenexa schema with req
HRXML schema

Once implementation of this feature starts, your Kenexa Integration Consultant works closely with your designated integrations Workbench user to maintain and extend your Integration projects. Please contact your CSC for more information.

Date Available	US: 2nd Qtr 2010 EU: 2nd Qtr 2010
Cost	☐ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☑ Workbench ☑ Workbench Self-Service ☑ Integrations ☑ 2x BrassRing New UI ☑ 2x BrassRing ☐ Talent Gateways ☐ Agency Manager ☐ Data Insight Tool ☐ 2x SmartApproval ☐ 2x Onboard
Visible Changes	☑ No – contact your CSC for implementation details. ☐ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☐ Specific conditions required – see details below. ☑ Configuration required – contact your CSC for details.

Benefits

Once implemented, customers can elect to update and maintain their purchased Integration Projects through Workbench, minimizing the need for special requests to Kenexa Systems Engineering. Your designated Workbench user must complete Tier 0 Workbench training before gaining access to the system. Please contact your CSC for more information.

Feature Description

(**Note:** This feature does not affect your organization's existing Integration Projects, if any.

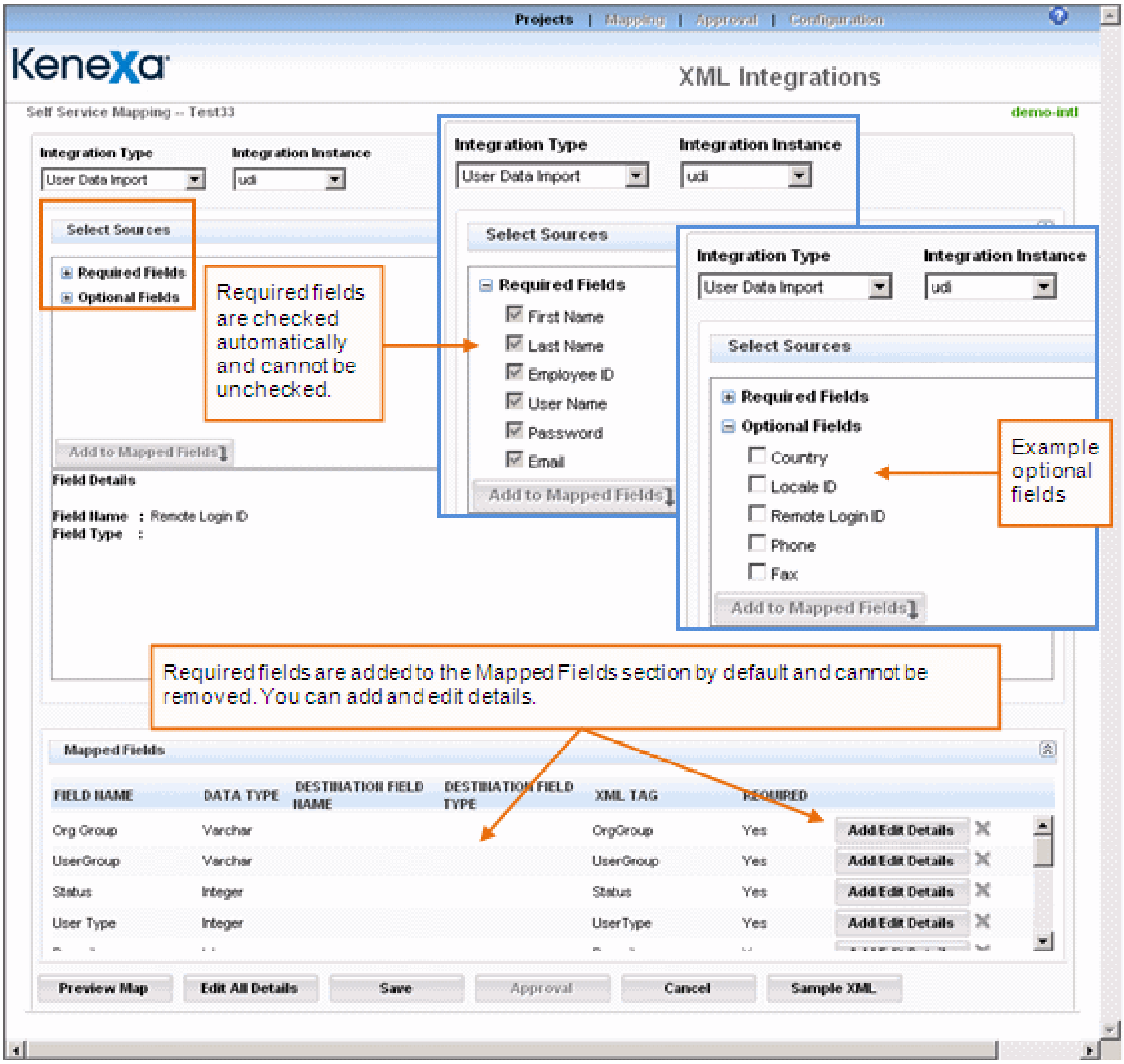
The Mapping Tool is a self-service tool for performing the following tasks for integration projects:

1. Mapping (client user)
2. Approving (Kenexa Integration Consultant)
3. Signing Off (client user)
4. Configuring for Staging (client user)
5. Publishing to Production (Kenexa Integration Consultant)

Who can do this: Certified Workbench Users – Tier 0 (proposed) will be able to perform these tasks in partnership with their Kenexa Integration Consultant.

See an example of the mapping screen for User Data Import on the next page.

Mapping Example: User Data Import



Kenexa Tasks

Sanjay Kumar is giving internal training on the following dates:

- Tues. (4/27) 9am-10:30am CT / 10am-11:30am ET
- Weds. (4/28) 1:30pm-3pm CT/ 2:30pm-4pm ET

For more information, see the document entitled, "*Kenexa Mapping Tool for Integrations*." This information is also included in Workbench online Help.

Table of Contents

Kenexa Mapping Tool

The *Kenexa Mapping Tool*, accessed in Workbench, is a tool for mapping, approving, and configuring integration projects for publication to the Staging and Production databases. It is one tool of several within Kenexa 2x BrassRing's *Integration Automation* module. Integration Automation supports the seamless exchange of multiple categories of data between 2x BrassRing and client information systems.

The integration mapping process consists of, for each integration *project*, *mapping* field relationships between Kenexa 2x BrassRing and client systems, *approving* the mapped relationships, and *configuring* the approved project for publishing to Staging and Production. Each integration project consists of the collection of *integration types* purchased by your organization. See the glossary of terms on page 44 and relevant sections in the documentation for more information.

Certified Workbench Users with Tier 0 certification can map, sign off on, and configure for publishing new integration projects and administer existing projects through a Web interface. Your organization may choose to assign different tasks to more than one user.

Audience

These instructions are addressed to Kenexa users or certified Workbench users who are charged with performing integrations mapping, approval, configuration for publication, and administration tasks. They assume that XML integration projects have been added for your organization in a previous step, and that you are ready to use the Mapping Tool.

Glossary

Term	Definition
Approval	The process of approving mapped projects.
Client System	The customer's information system(s), such as an HRIS, with which 2x BrassRing exchanges data.
Configuration	The configuration process for pushing mapped and approved integration projects to the Staging or Production databases.
Integration Instance	An integration instance is a named member of a Project. It has a single Integration Type and associated set of Instance Properties. A Project consists of one or more Instances.
Instance Properties	Instance Properties are the attributes of an Integration Type Instance.
Integration Type	A specific type of import, export, or update that can be accomplished through automated XML integrations. The supported integration types are: ▪ User Data Import ▪ Foundation Data Import ▪ Job Code Default Data Import ▪ Requisition Import ▪ Form Data Import ▪ HR Status Update ▪ Candidate Import (with Form Import and/or HR Status Update) ▪ Requisition Field Association Import ▪ Single Sign-On for 2x BrassRing and Talent Gateways ▪ Candidate Export (Legacy Candidate Export, Legacy Candidate Export with Requisition Information, and HRXML Candidate Export).
Mapping	A correspondence specified between a field in an external system and a field in 2x BrassRing.
Project	A Project consists of at least one integration type purchased by your company or organization. A project can include many integration types. See the full list of integration types under "Integration Type" in this table. Most organizations have one or two projects, but they can purchase multiple projects if necessary.

XML Tag	The valid xml markup text specified for a field (for example, <firstname></firstname>).

Task Flow and Ownership

Your Kenexa consultant(s) work with your organization to collect the information required for your XML integration mapping project or projects. Once that information is collected, your organization's designated Certified Workbench user(s) with Tier 0 certification can perform Mapping Tool tasks.

For each project, the appropriate user performs the following tasks in the designated order.

Certified Workbench user tasks are in rows with the yellow background.

Order	Who does this…	Task Description	For more information…
1	Client and Kenexa Integration Consultant	Determine which integration types are included in the integration project to be mapped.	Contact your CSC.
2	Client and Kenexa Integration Consultant	Collect field mapping information for each integration type included in the integration project.	Contact your CSC.
3	Kenexa Integration onsultant	Determine the order for mapping those integration types.	See "*Mapping Order for Integration Types*" page 19 for more information. You will receive specific instructions for mapping in your environment.
4	Client's designated certified Workbench user(s)	Map each integration type in the prescribed order:	See the section "*Mapping Order for Integration Types*" on page 61 for more information.
4a	"	Create a draft project on the Project Details page if no draft exists.	See page 7.
4b	"	Map integration types contained within the draft project according to the instructions for each type.	See pages 11, 56, and individual sections for each integration type.
4c	"	Send the mapped project for approval (partial or complete).	See page 25.
4d	"	Create a version of the draft project.	See page 31.
4e	"	Send the version for approval.	See page 31.
5	Kenexa Integration Consultant	Reviews integration mapping for the version sent for approval and either: Rejects the version and sends it back Approves the version	See "Approver's Workflow: Approving a Project Version" on page **Error! Bookmark not defined.**.

6	Client's designated certified Workbench user	Signs off on the *approved* version and holds it OR Signs off on the *approved* version, signaling that it is ready for configuration for Staging or Production	See "Signing Off on an Approved Project" on page 37
7	Kenexa Integration consultant OR Client's designated certified Workbench user(s)	Configure the approved project for publication to your organization's Staging database.	See page 47.
9	Kenexa Integration Consultant OR Client's designated certified Workbench user(s)	Configure the approved project for publication to your organization's Production database.	See page 51.

Preparation for Integration Mapping

The steps below assume that your organization's integration project has been added to the Integrations database and is ready for mapping.

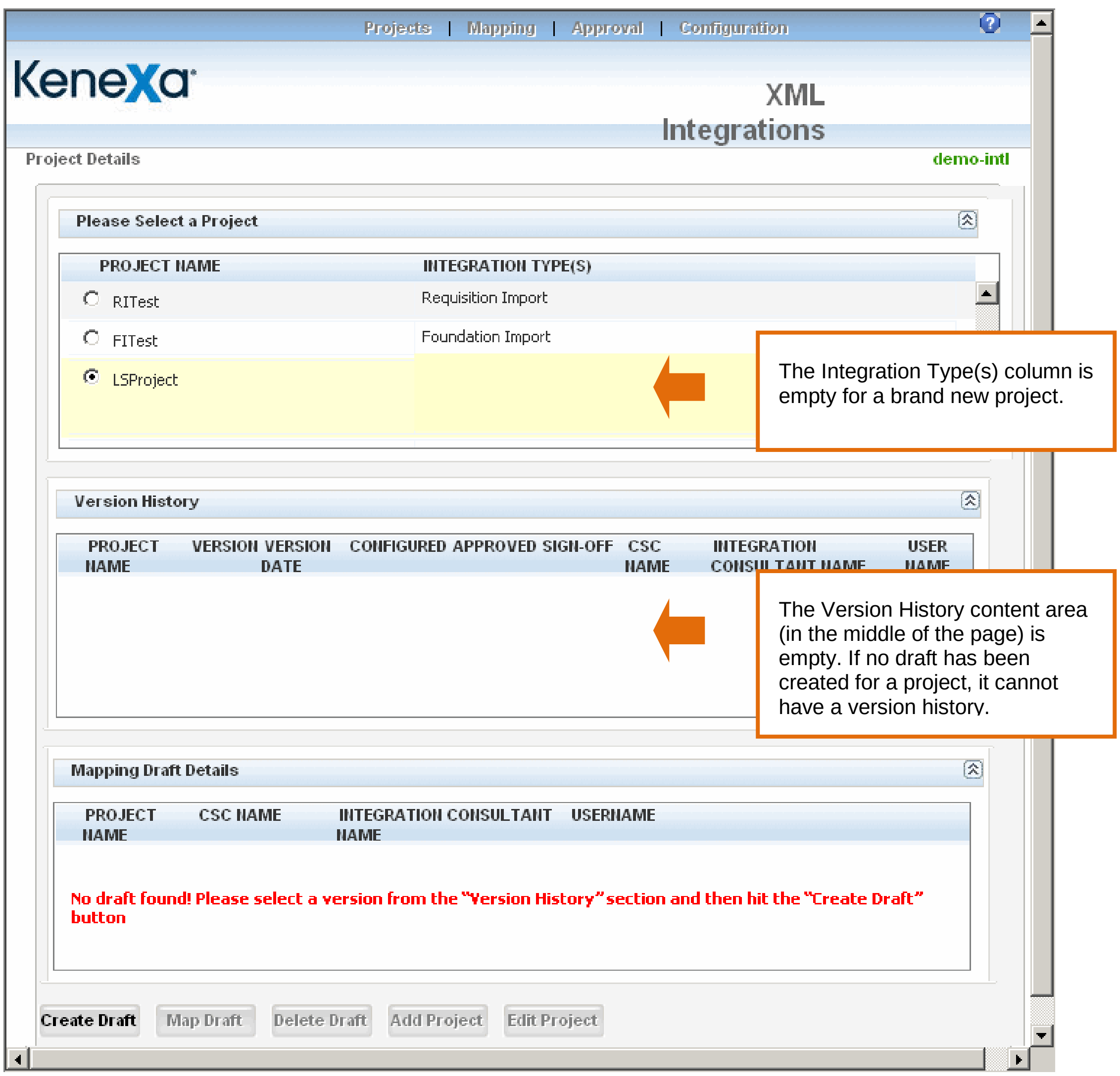
1. Your organization must designate users to become Workbench certified for the self-service Integration Mapping tasks.
2. Designated users must complete Workbench training for Tier 0. (Contact your CSC for more information.
3. Certified Workbench users obtain login credentials for Workbench. Contact your CSC for more information.
4. When you are ready to start the integration mapping tasks, ensure that you have the integration mapping worksheets collected for this project in hand. This information specifies the order in which you should perform mapping tasks and provides detailed mapping content.

Creating a Draft Project

Before mapping an integration type that is part of a project, you must create a **Draft Project** if one does not exist already.

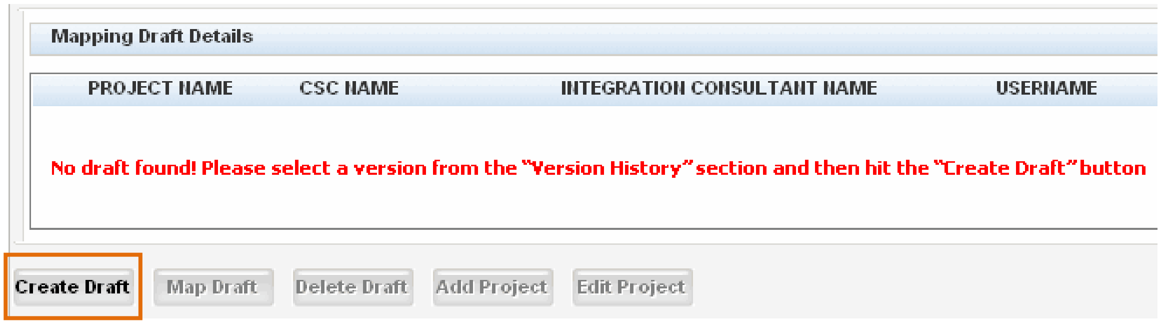
To create a draft project:

1. In Workbench, select **Tools > Integrations > Mapping Tool**. The **Project Details** page displays. The integration project(s) added for your organization are listed in the top content area under **Please Select a Project**. In most cases, there will be one, or only a small number of projects.
2. Select the radio button for the project for which you are creating a draft version in the **Please Select a Project** area of the **Project Details** page, as shown below.

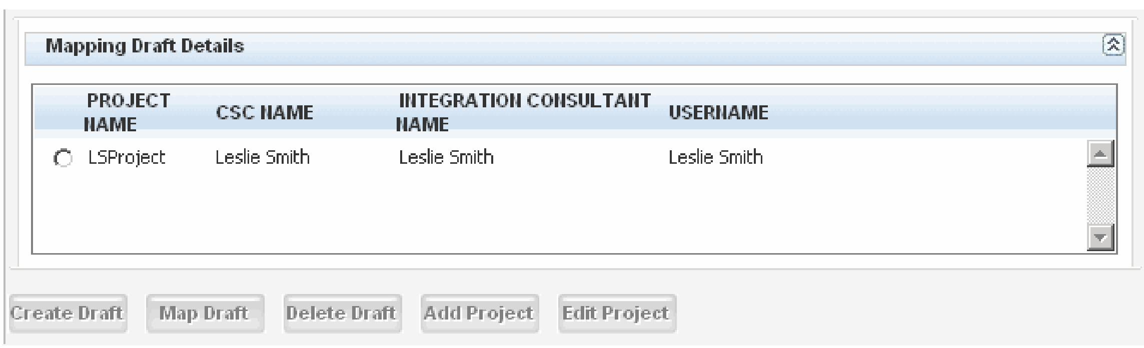


3. In the **Mapping Draft Details** section of the page, the "**No draft found! ...**" message displays. The **Create Draft** button on the task bar at the bottom of the page is enabled.

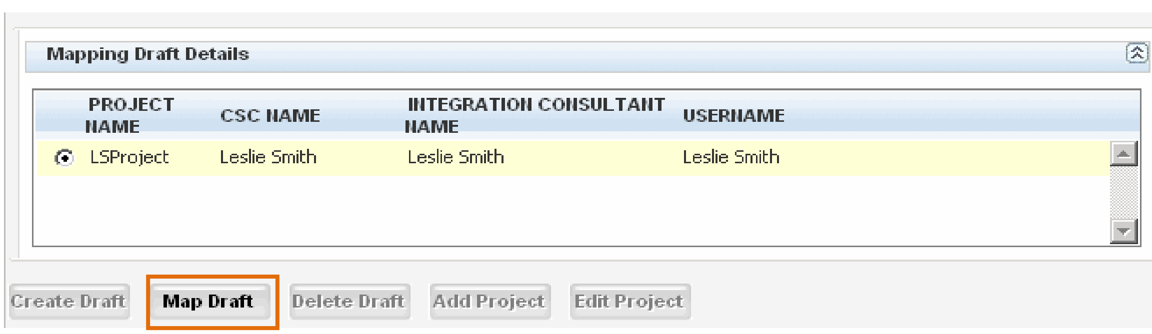
   Note: You must create a draft version of the project before you can start mapping.



4. Click the **Create Draft** button.
5. The draft version of the project appears in the **Mapping Draft Details** area. The initial draft version of a project does not have a version number.



6. Select the radio button for the project. The **Map Draft** button is enabled.



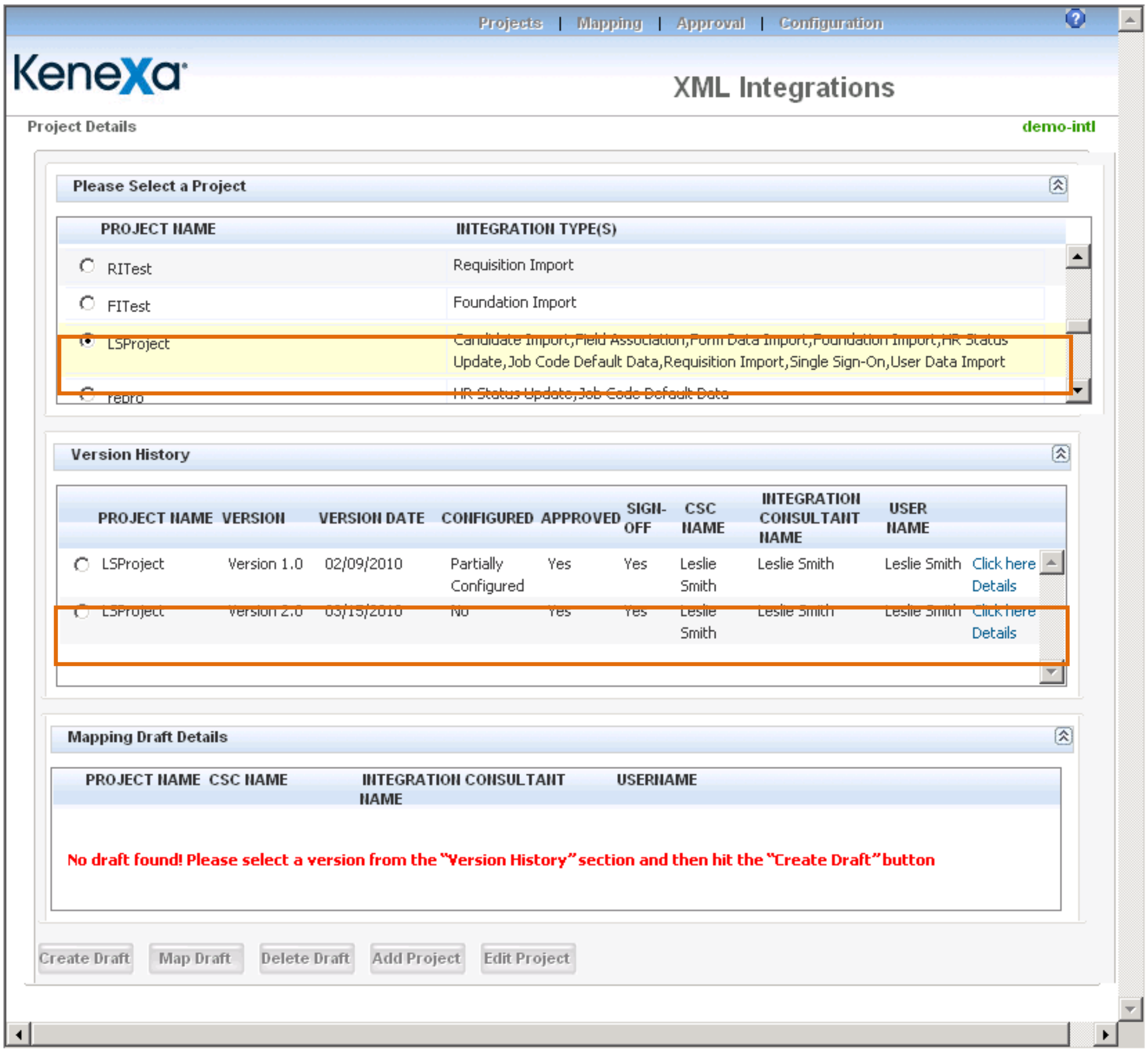
7. Follow the instructions on page 11 for mapping a draft project.

Creating a Subsequent Draft Project

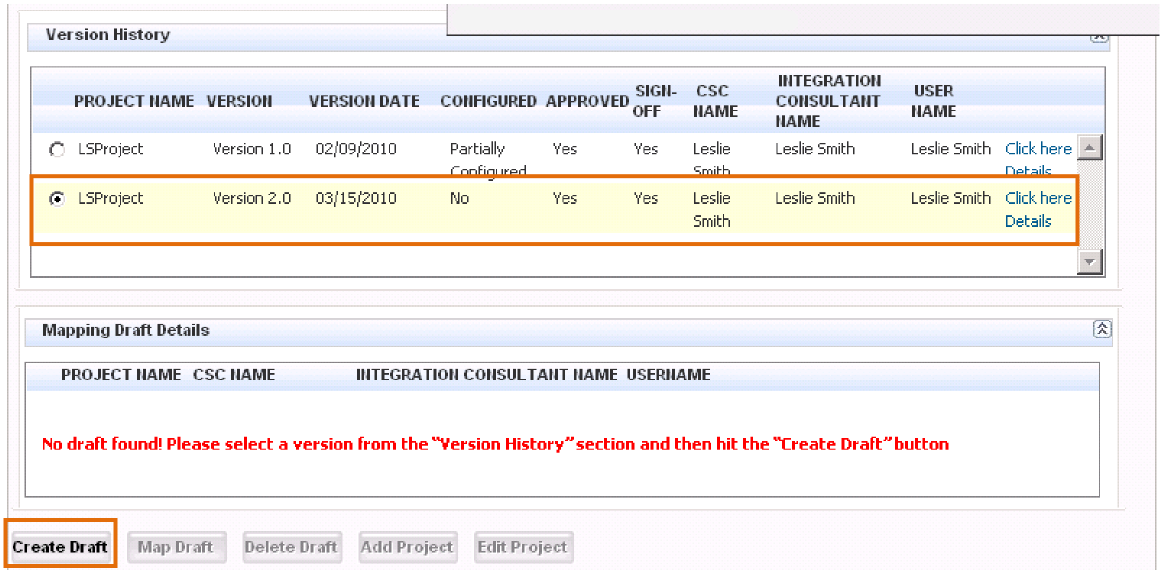
You can map projects in stages. You can send a version for approval and resume mapping another part of the project (for example, you can start mapping a different integration type). Before doing that, you must create a new version of the project.

To continue mapping a project for which a version has been sent for approval (or already approved):

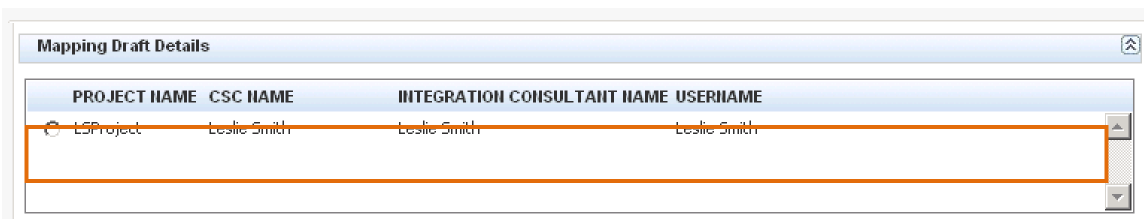
1. On the **Project Details** page, select the project in the **Please Select a Project** section if it is not already selected.



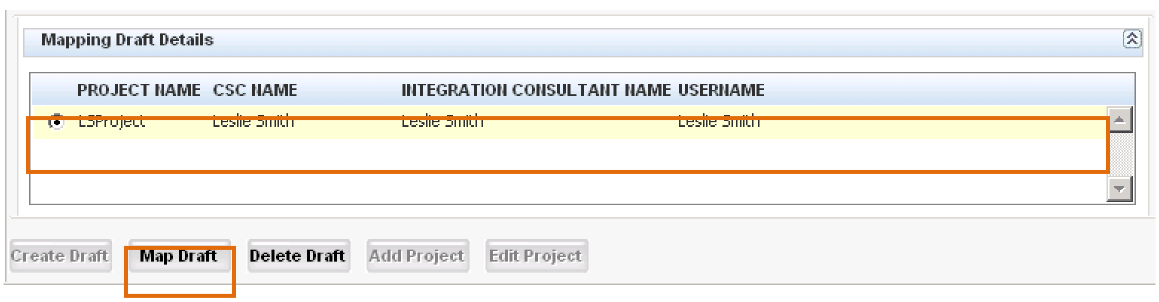
2. Select the latest version of the project in the **Version History** area.



3. Click **Create Draft**. A new draft version of the project is added to the **Mapping Draft Details** section.



4. Select the radio button for the new draft version of the project.



5. Click the **Map Draft** button. The **Self-Service Mapping** page for this version of the project displays.
6. Follow instructions on page 11and for the specific integration type you want to map.

Mapping a Draft Project

These instructions assume that you have created a draft version of the project. (Note: By definition, you can do the mapping task *only* on a draft version of the project.)

To display the mapping page for the project:

1. Select the radio button for the project that you want to map in the top content area of the **Project Details** page.
2. Select the radio button for the same project in the **Mapping Draft Details** section of the page. (If the project is brand new and no draft has been created, see page 7 for information on how to create a draft project.)
3. Click the **Map Draft** button.

4. The **Mapping** page for this project launches. No values are selected or added.

The next section describes how to complete the **Mapping** page.

Completing the Mapping Page

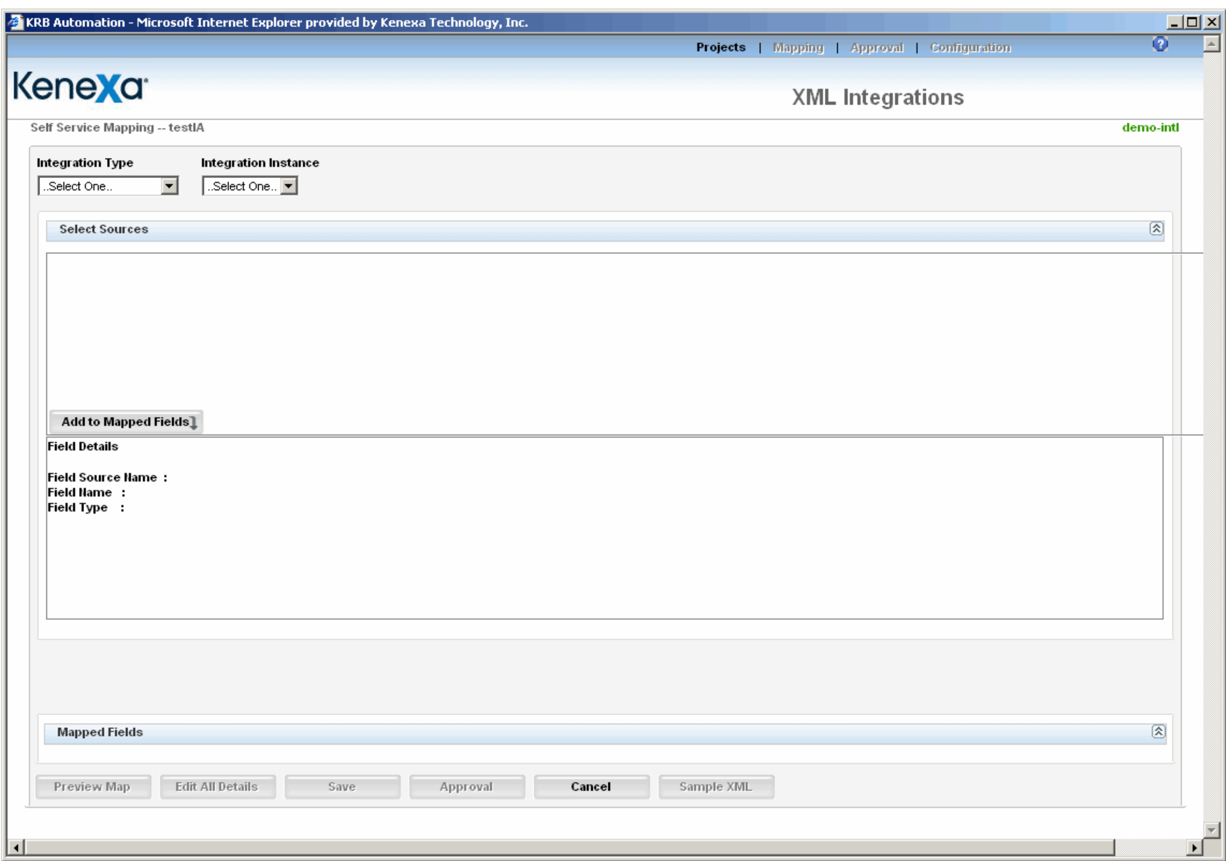
This section describes how to complete the **Mapping** page for the draft project you selected on the **Project Details** page.

Ensure that you have the integration mapping information collected for this project in hand. This information specifies the order in which you should perform mapping tasks and provides detailed mapping content. Also, see the “*Appendix*” starting on page 25 for additional information.

Your goal on this page is to perform, in the prescribed order, mapping between 2x BrassRing fields and your organization’s information system fields for each integration type belonging to the project. You will map fields for one integration type at a time.

Mapping in Stages: You can do integration type mapping in stages—you don’t have to do all the mapping for a project or even a single integration type in one session. See page 26 for instructions on how to resume mapping for a partially mapped project.

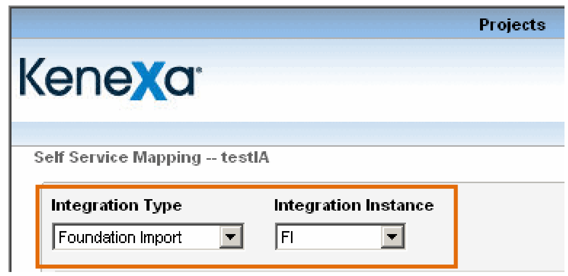
The **Mapping** page is empty when you start to map an integration type for the first time.



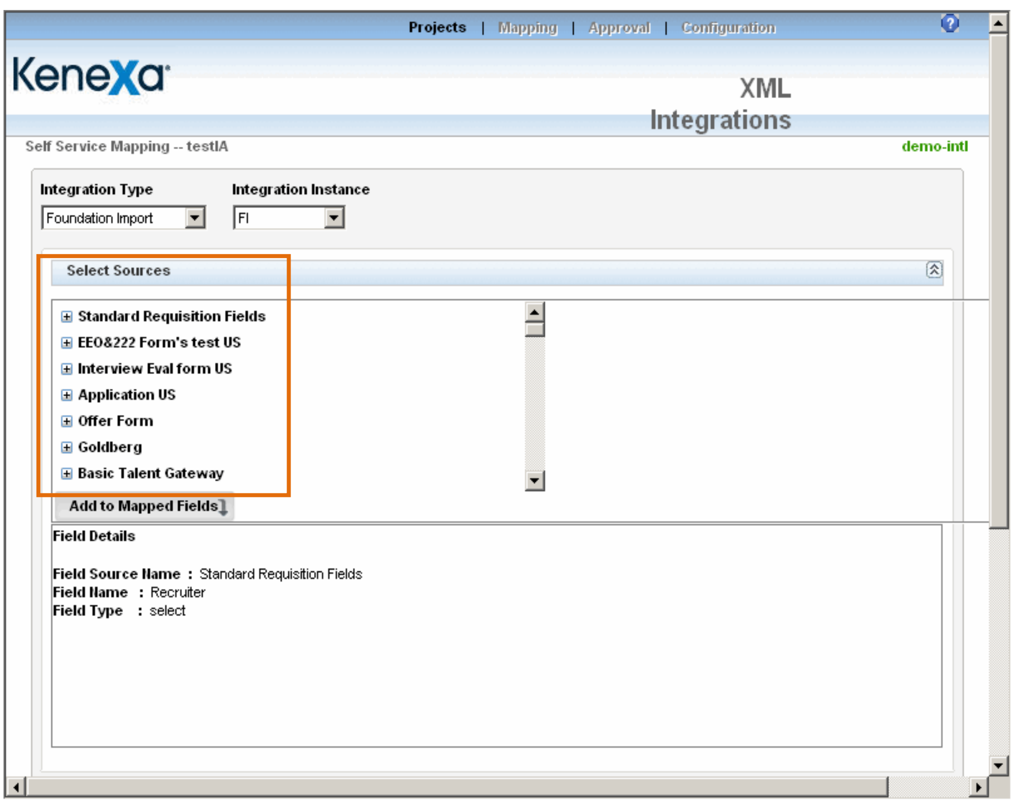
1. Select the **Integration Type** for which you will perform mapping. The list displays all of the available integration types that are part of the selected project. See the Appendix starting on page 55 for more information about each integration type.

2. Select the **Integration Instance** for the selected **Integration Type**. The list displays all the instances that are available for the selected integration type. (Your mapping worksheets should included information about which instance to select if there is more than one instance.)

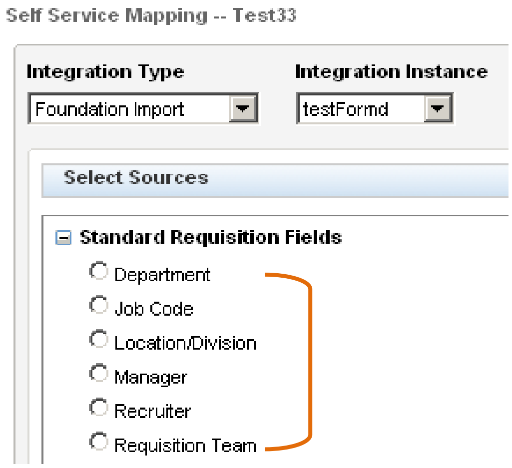
In the example, the *Foundation Import* is selected for the **Integration Type** and *F1* is selected as the **Integration Instance**.



Once the **Integration Type** and **Integration Instance** are selected, the **Select Sources** content area displays an expandable list of categories of data that are available for mapping for the selected integration type. For example, the sources for the Foundation Import are Standard Requisitions Fields, Requisition Forms, Talent Gateway Forms, Candidate Forms, and other data. This list represents all possible sources from within 2x BrassRing for that integration type. For information about sources for each integration type, see the "*Integration Type Details Summary Table*" on page 56.

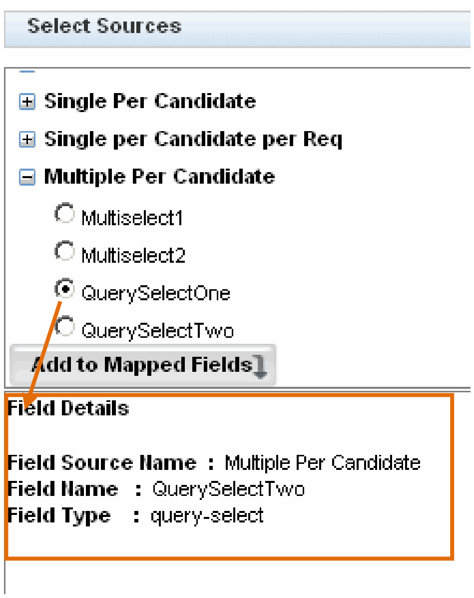


3. Click the plus sign to expand the list under a source category, as shown in the example below.



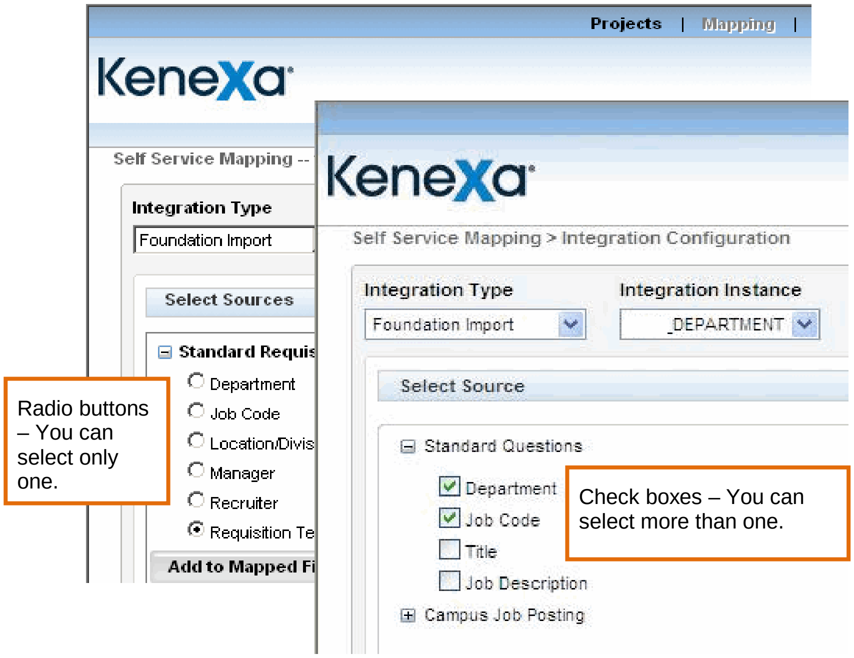
To see information about an individual field in the expanded list, select or hover the mouse pointer over the field to display details in the **Field Details** section.

Note: The **Field Details** section always displays the details of the last field you selected or hovered over.

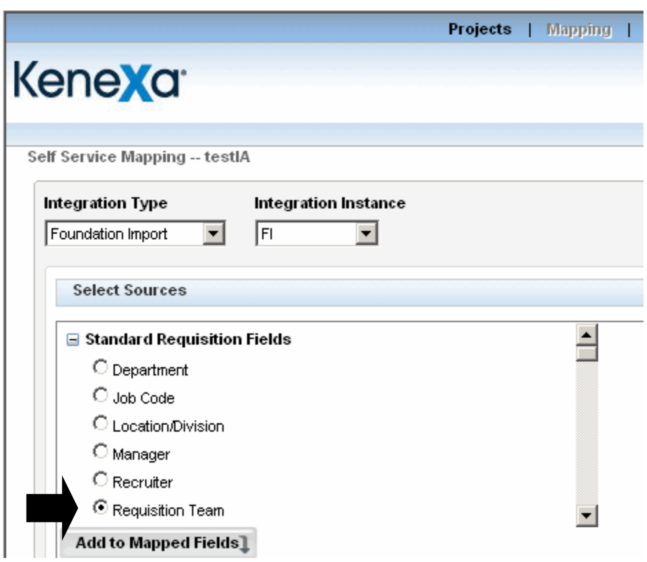


The section includes the source of the field (**Field Source Name**), the database name for the field (**Field Name**), and the field's type (**Field Type**) such as single-select, multi-select, query-select, and so forth. See the "*Integration Type Details Summary Table*" on page 56 for detailed information about sources for each integration type.

Integration Mapping [XMAP] provides different selection methods for each source associated with each integration type. Two examples of selection methods are *radio buttons* and *check boxes*.



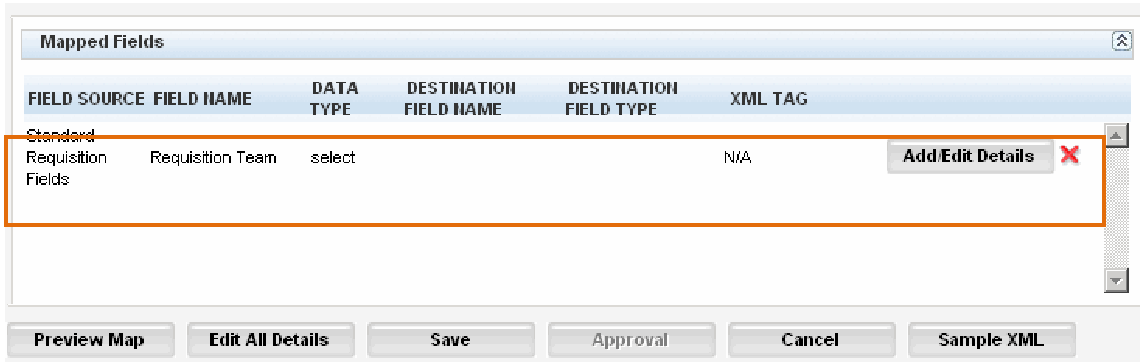
4. Scroll to the source category, expand the list of sources under that category, and select the desired source. (In the example below, the category **Standard Requisition Fields** is expanded, and the **Requisition Team** is selected.)



5. Click **Add to Mapped Fields**. The selected source is added to the **Mapped Fields** area at the bottom of the page.

6. **Important!** – Click **Save** before trying to add another field. (If you select another field before saving, a message displays warning you that you will lose unsaved fields selected for mapping.)

7. Fields are added successively to the top of the list in the **Mapped Fields** section of the page.



Preview Map: Click **Preview Map** to view the mapped fields at any time. See page 19 for more information.

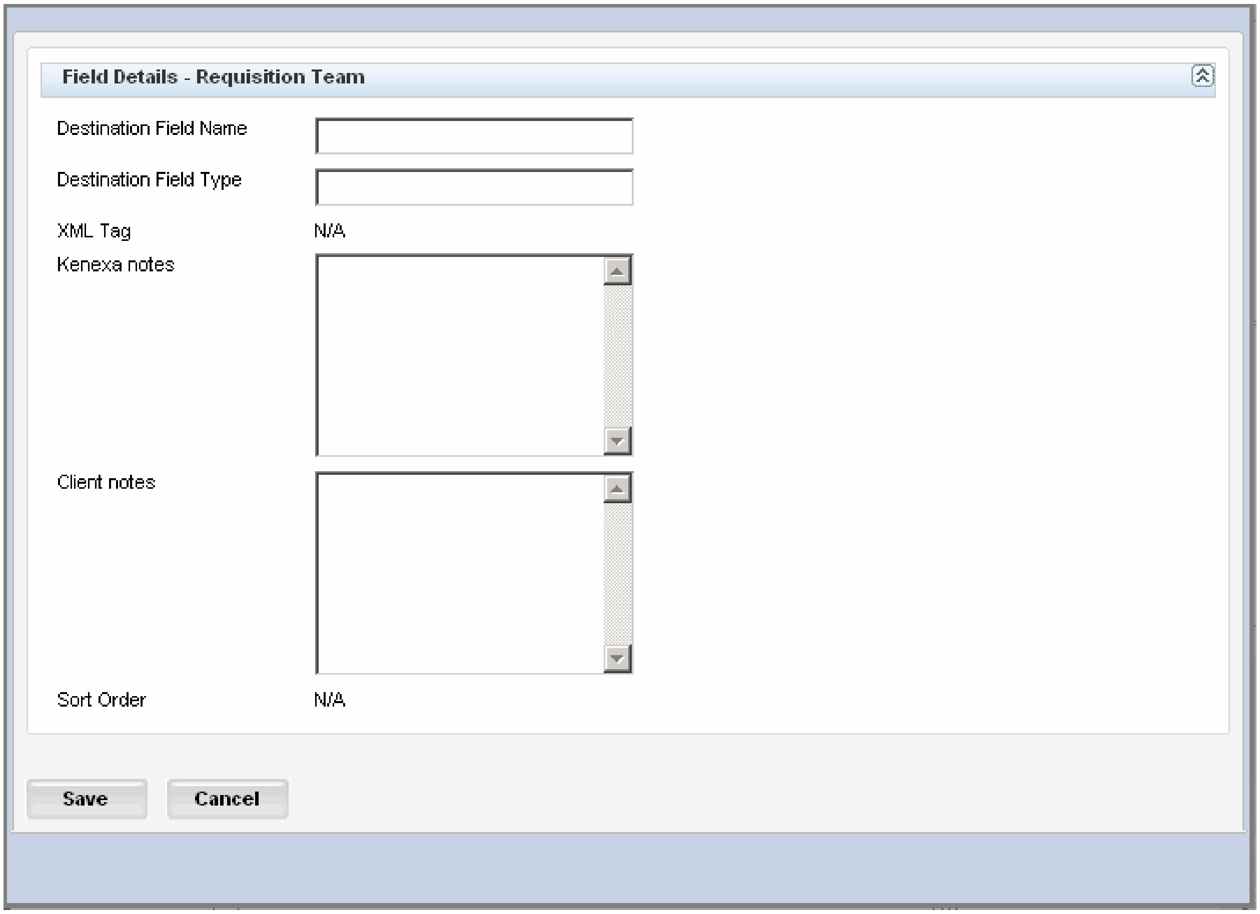
Edit All Details: Click **Edit All Details** to access any of the integration types for which fields have been mapped. See page 21 for more information.

Sample XML: Click **Sample XML** to see the XML that is generated for the field once it is mapped. See page 23 for more information.

: Click the red X to remove the row from the **Mapped Fields** section You can also remove a field from the list of mapped fields by de-selecting it in the **Select Sources** section.

8. Click **Add/Edit Details** to add or edit details for each mapped field. Note: There are no details to display and edit for the following integration types: **SSO Integration type**, **HRStatus update**, and **Field Association**.

9. The **Field Details** page for that field source opens.



10. Complete the fields on this page using your mapping worksheets. Also, the information immediately below and the *“Integration Type Detail Summary Table”* on page 56 provide general guidelines for these fields:

    Destination Field Name – Enter the client-defined destination field name that corresponds to the field name in the client’s system. This field accepts up to 50 alphanumeric characters.

    Destination Field Type – Enter the data type for the destination field above.

    XML Tag – This is a custom tag included for destination fields for selected integration types. This field is available and active only for **Job Code Default Data Import**, **Requisition Import**, and **Candidate Export**. For more information, see the *Integration Type Detail Summary Table* on page 56 for more information and the individual sections for each of those integration types.

    Kenexa notes – Kenexa users can enter notes in this field of up to 4000 characters if desired. You can edit all Kenexa notes except for Field Association notes.

Client notes – Kenexa or Client users can enter client-specific notes in this field of up to 4000 characters if desired. The field stores previously entered notes if they exist. The notes are editable.

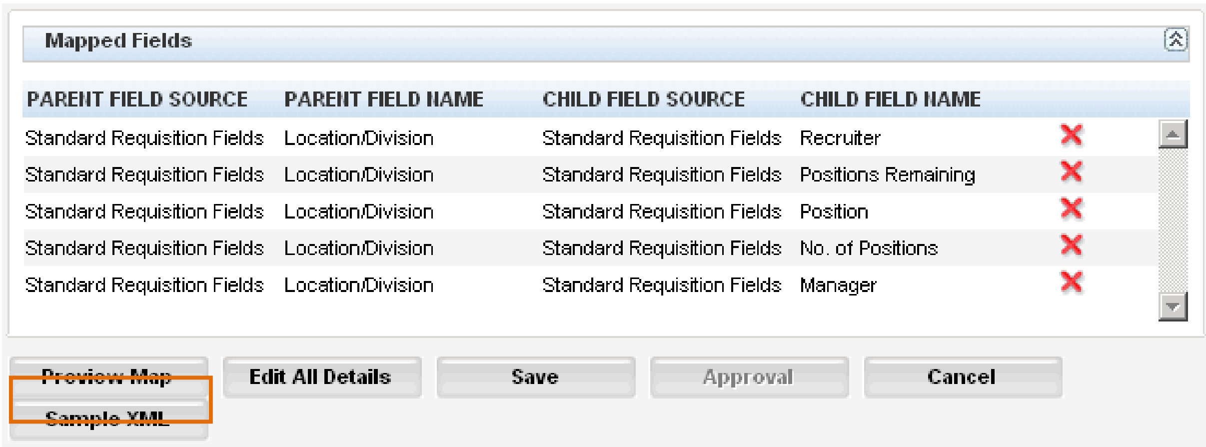
Sort Order – This value applies only to the Candidate Export integration type and is disabled for all other integration types. This value specifies the order of this XML tag relative to other XML tags within a candidate export.

11. Click **Save** when you are finished. If necessary, you can click **Cancel** to exit without saving anything.
12. Repeat this procedure in the prescribed order as described in your mapping worksheets. For a general idea of the order, please see page 61.
13. When field mapping is complete and you are ready to send a set of mappings for approval, you (or the designated Approver) must create a **version** of the draft project. See page 31 for more information.

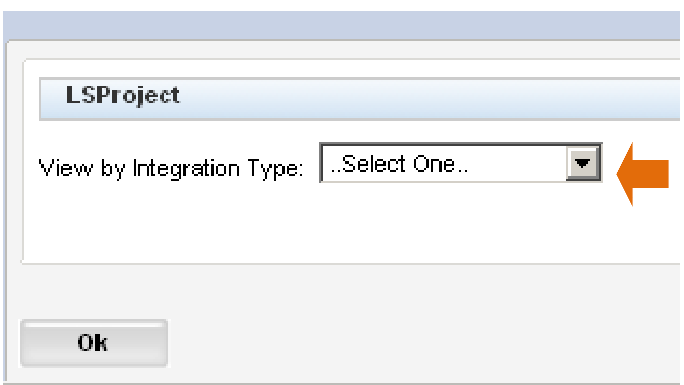
Previewing Mapped Fields

When working on the Mapping page for an integration type and instance, you can preview the fields you have added to the **Mapped Fields** section:

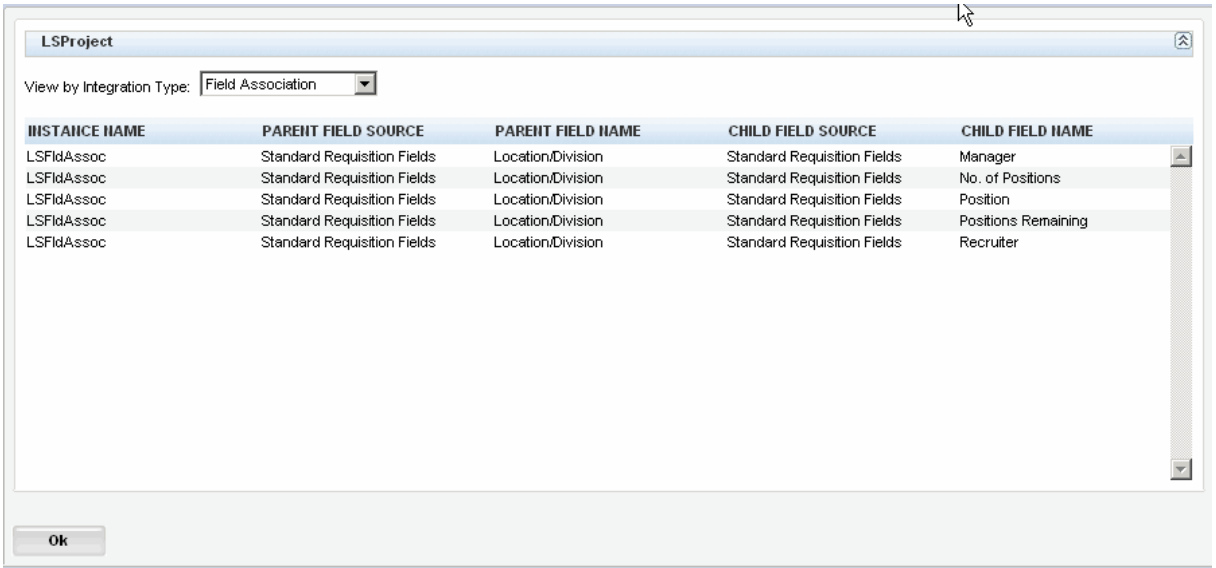
1. Click **Preview Map** to view all fields selected so far in a new window.



2. The **Project Details** window displays. Select the integration type you want to view from the dropdown list. You can select “All” integration types. It lists



3. The project page displays all the integration types that are associated with the project in alphabetical order (**Integration Type**, **Instance Name**). Each page displays up to ten (10) records. If there are more than ten (10) records to display, you can click a link to display subsequent pages



INSTANCE NAME	PARENT FIELD SOURCE	PARENT FIELD NAME	CHILD FIELD SOURCE	CHILD FIELD NAME
LSFldAssoc	Standard Requisition Fields	Location/Division	Standard Requisition Fields	Manager
LSFldAssoc	Standard Requisition Fields	Location/Division	Standard Requisition Fields	No. of Positions
LSFldAssoc	Standard Requisition Fields	Location/Division	Standard Requisition Fields	Position
LSFldAssoc	Standard Requisition Fields	Location/Division	Standard Requisition Fields	Positions Remaining
LSFldAssoc	Standard Requisition Fields	Location/Division	Standard Requisition Fields	Recruiter

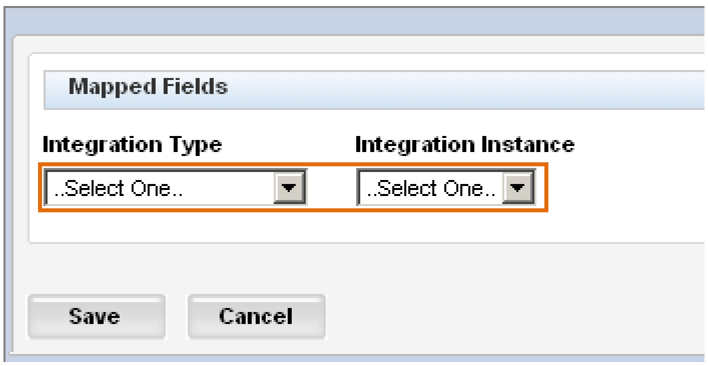
4. Click **OK** to exit this page.

Editing All Details

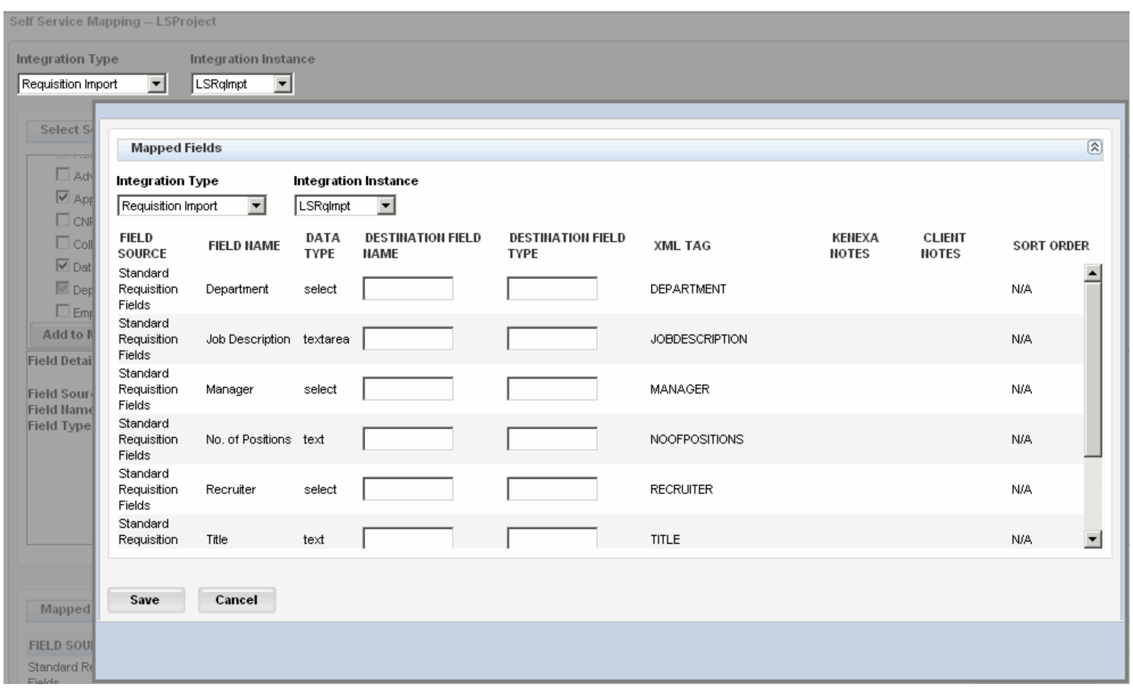
To edit any mapped field added for any integration type and instance that is available in this project, click the **Edit All Details** button. This button is not active and clickable on the **Mapping** page until at least one row has been added to the **Mapped Fields** section.

Note: You cannot edit details for the **SSO** (Single Sign On) and **HRStatus** integration types.

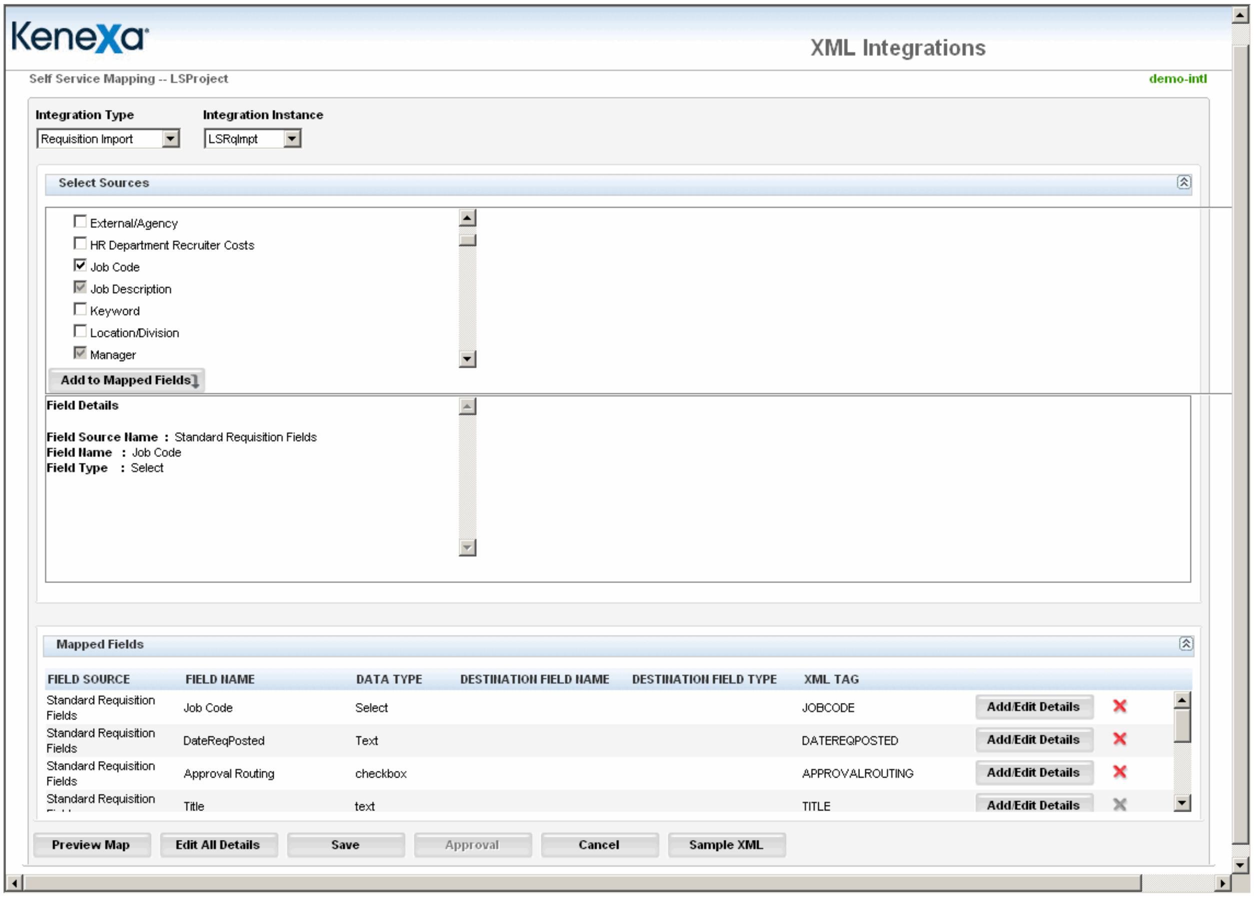
The **Mapped Fields** page displays. You can select any integration type within the project that is eligible for editing from this page.



In the example below, **Requisition Import** and **LSReqImpt** are selected. You can edit the **Destination Field Name** and **Destination Field Type** for each field. Click **Save** when you are finished.

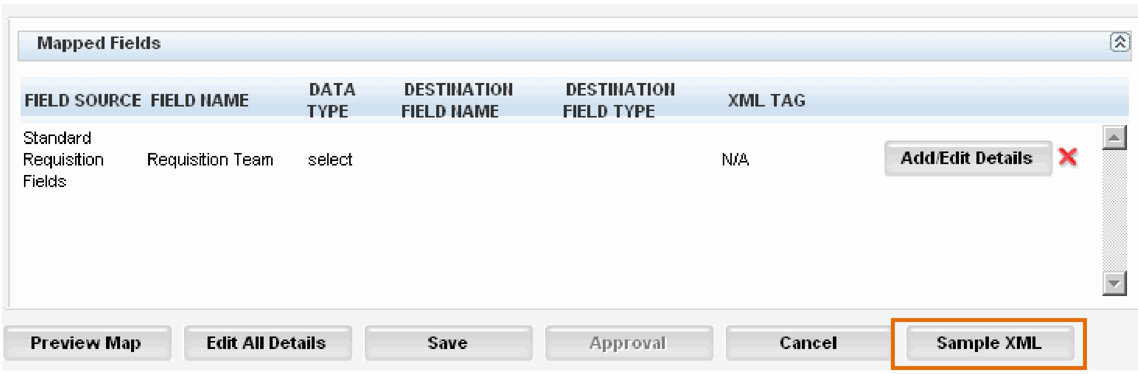


Mapping Tool for Integrations

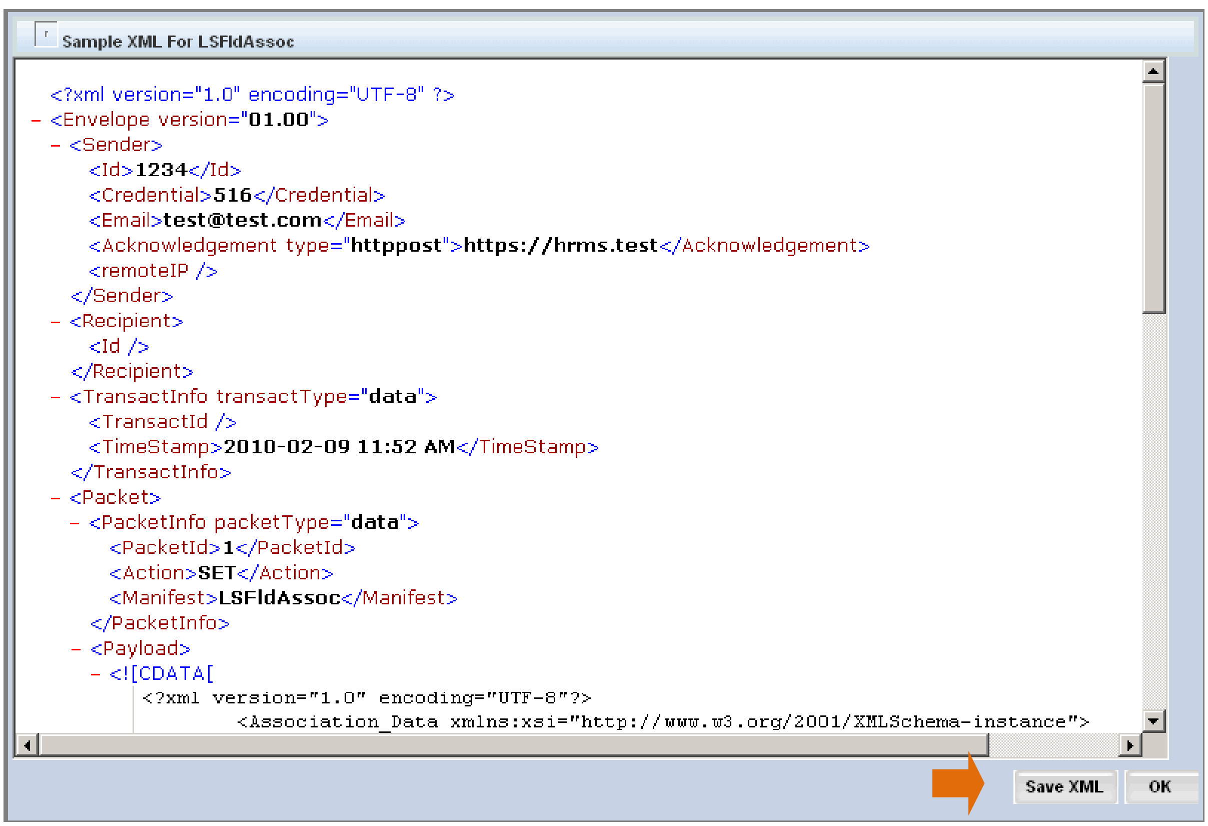


Viewing the Sample XML

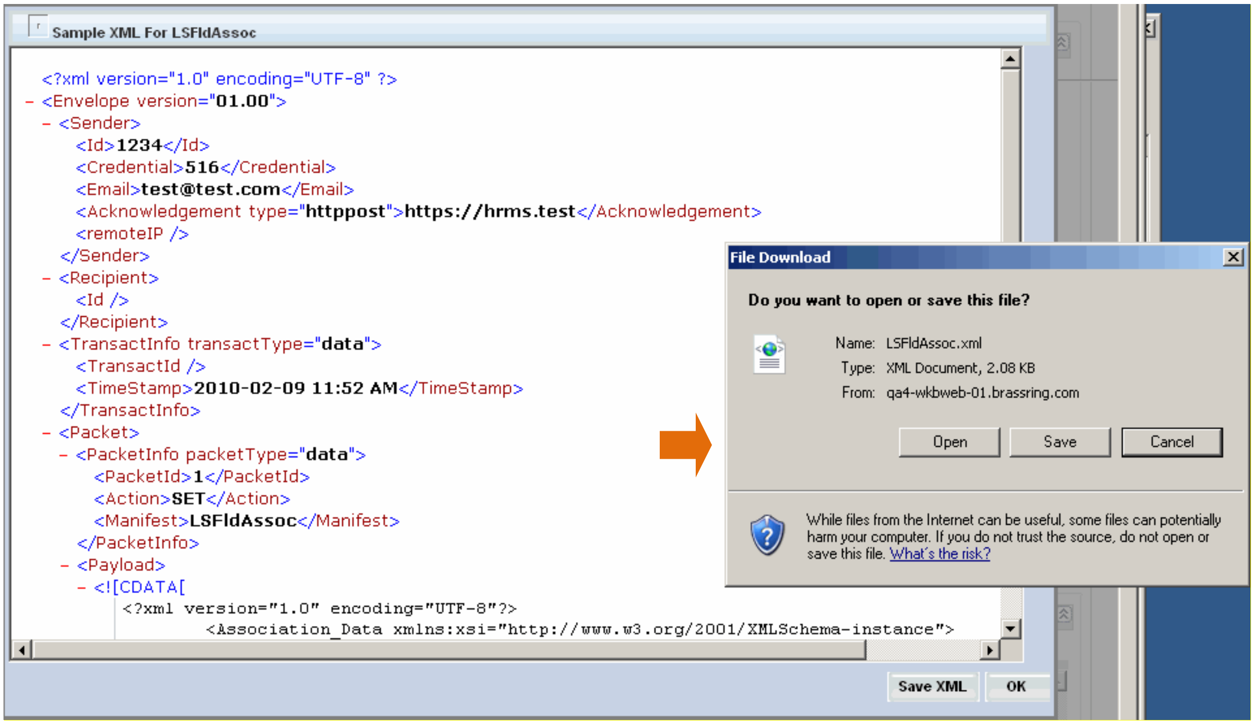
Click **Sample XML** to view an example of the XML based on the data that was selected for mapping.



The **Sample XML** window opens for the field mapping.



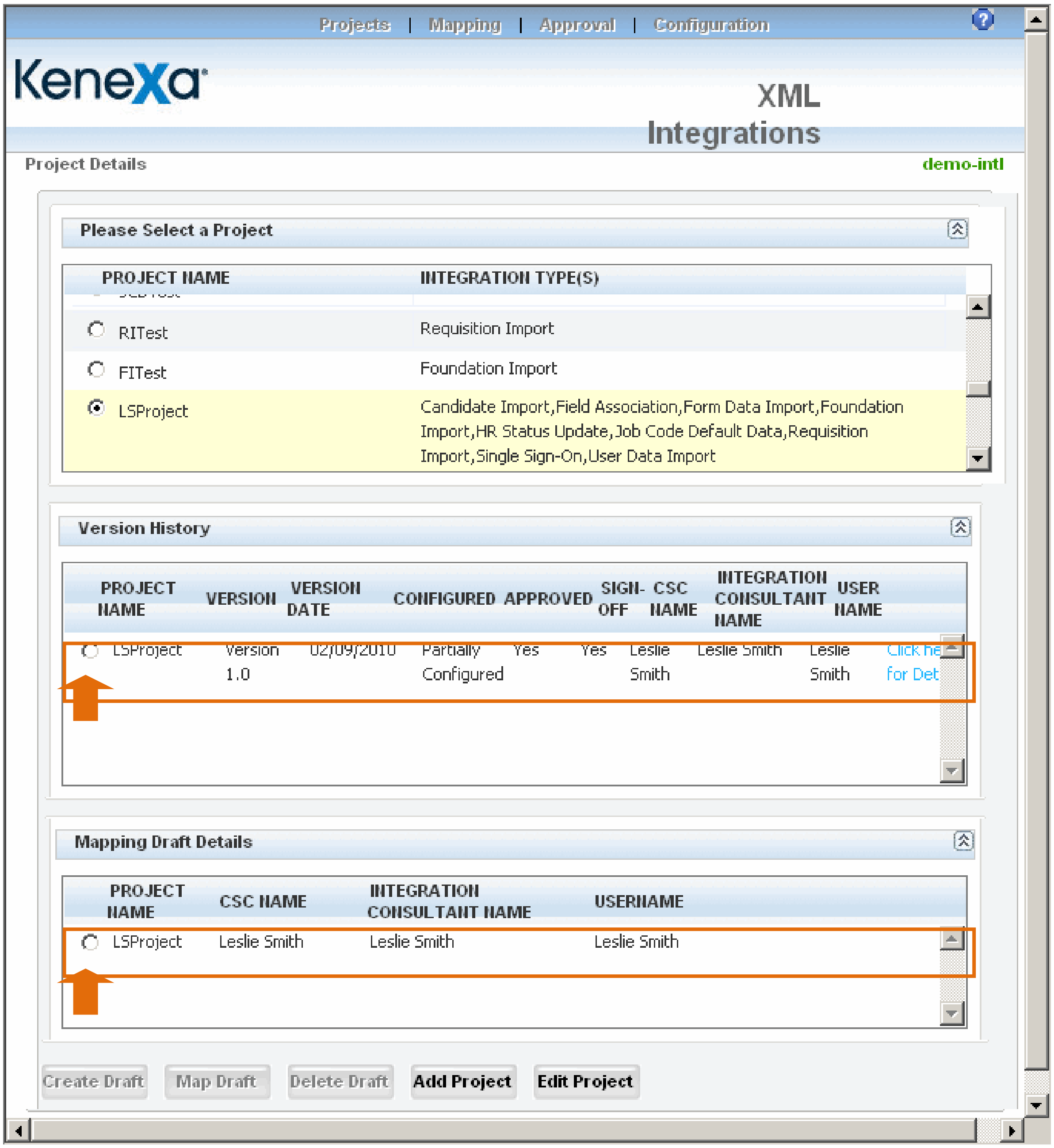
You can click **OK** to close the window. Alternatively, you can click **Save XML** to save a copy of the xml file to your hard drive or network drive:


Sample XML For LSFldAssoc
<?xml version="1.0" encoding="UTF-8" ?>
- <Envelope version="01.00">
- <Sender>
<Id>1234</Id>
<Credential>516</Credential>
<Email>test@test.com</Email>
<Acknowledgement type="httppost">https://hrms.test</Acknowledgement>
<remoteIP />
</Sender>
- <Recipient>
<Id />
</Recipient>
- <TransactInfo transactType="data">
<TransactId />
<TimeStamp>2010-02-09 11:52 AM</TimeStamp>
</TransactInfo>
- <Packet>
- <PacketInfo packetType="data">
<PacketId>1</PacketId>
<Action>SET</Action>
<Manifest>LSFldAssoc</Manifest>
</PacketInfo>
- <Payload>
- <![CDATA[
<?xml version="1.0" encoding="UTF-8"?>
<Association_Data xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
Save XML
OK
File Download
Do you want to open or save this file?
Name: LSFldAssoc.xml
Type: XML Document, 2.08 KB
From: qa4-wkbweb-01.brassring.com
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Exporting Project Details to Excel

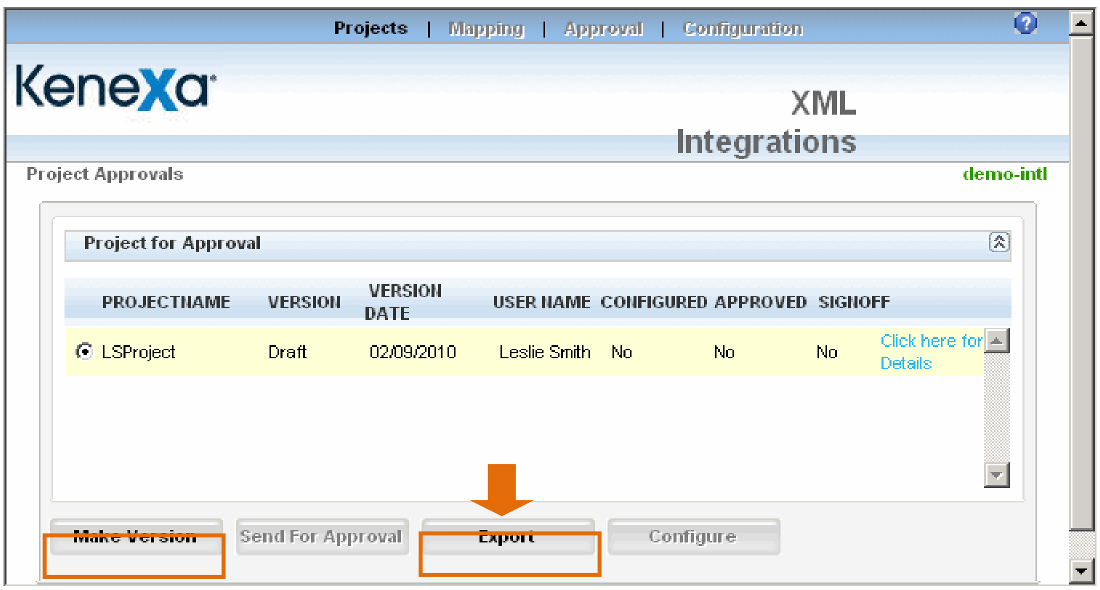
You can export mapped field detail to Excel for the draft project or for a version of the project from the **Project Approvals** page.

1. Select either a Version in the **Version History** section, or a Draft project in the **Mapping Draft Details** section of the **Project Details** page.

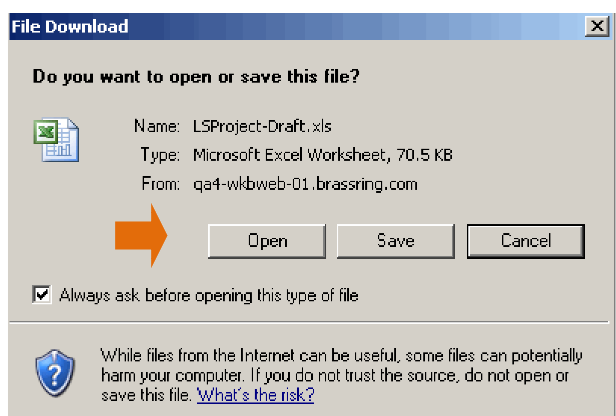


2. Once either the versioned or the draft project is selected, the **Approval** link in the top navigation bar at the top of the page becomes active.

3. Click the **Approval** link. The **Project Approvals** page opens.
4. Select the radio button for the draft version of the project. The **Make Version** and **Export** buttons become enabled.



5. Click **Export** to export the mapping details for the selected project (in this case, the draft project for LSProject) to Excel.
6. A typical **File Download** window displays. You can save the Excel file or open it on the spot (and save it afterward if desired.)



Partially Mapped Projects

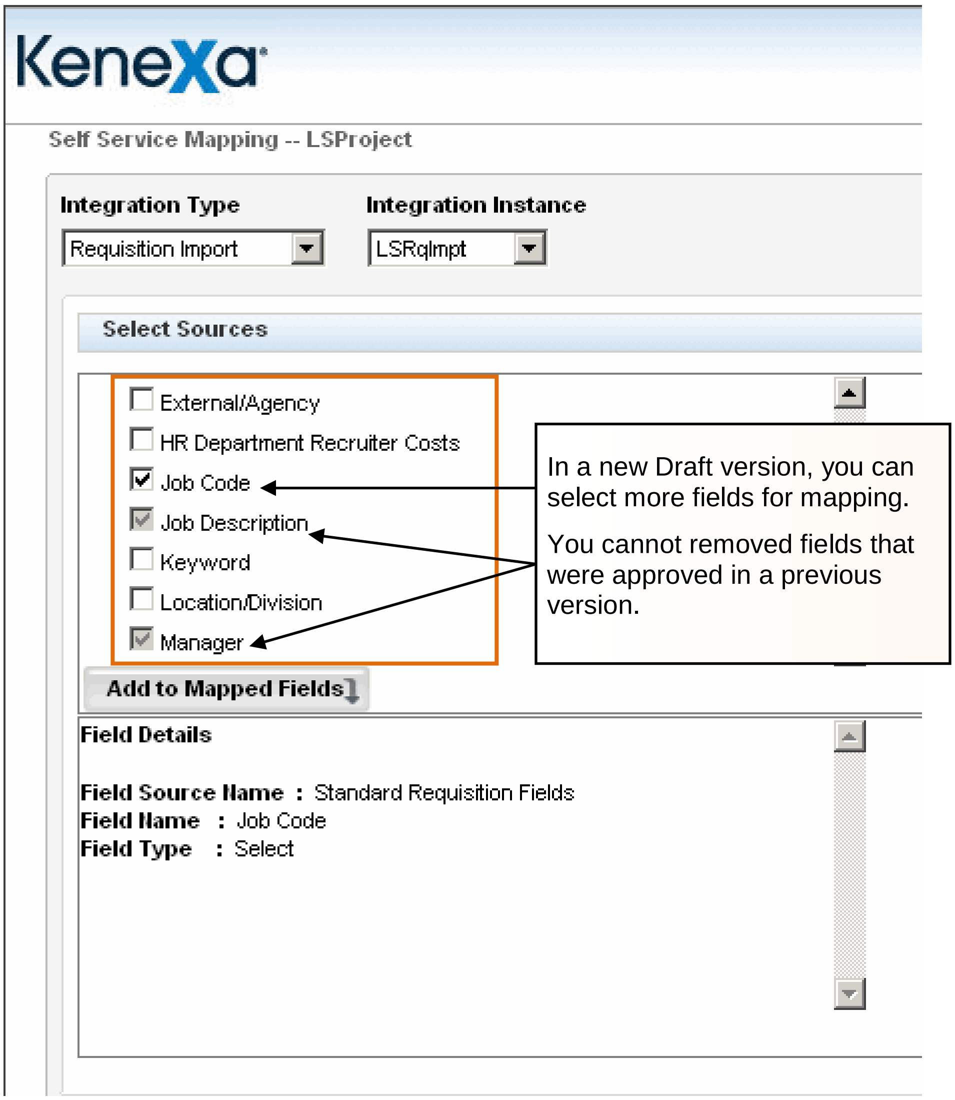
You can complete field mapping for an integration type, a group of integration types, all integration types, or even a part of one integration type. To resume mapping a project, you must create the next **Draft** version of the project. See the section, "*Creating a Subsequent Draft Project*" on page 8 for detailed steps. Here is a quick review:

1. On the **Project Details** page, select the project for which you want to continue mapping in the list of projects at the top of the page.
2. In the **Version History** area, select the version of the project from which you want to create the next draft project.
3. Click the **Create Draft** button.
4. A new draft version (unnumbered) of the project appears in the **Mapping Draft Details** section. Select its radio button.
5. Click **Map Draft** to open the **Mapping** page and resume mapping of the project.

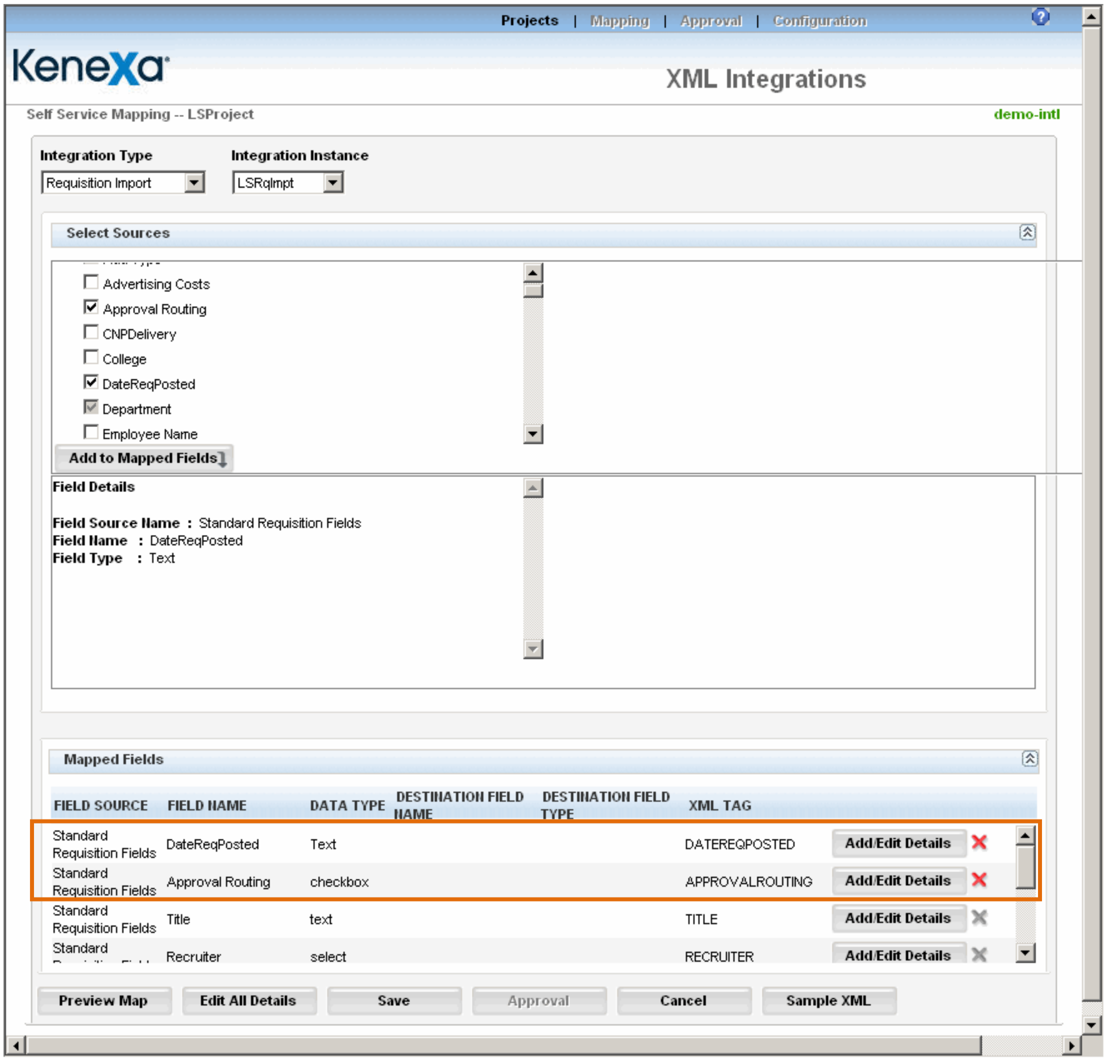
Mapping a Subsequent Draft - Differences

There are differences in what you see for the first draft and a subsequent draft:

In the **Select Sources** area, you can select additional fields to be mapped. You cannot de-select (uncheck) fields that were mapped previously for this instance and have been officially approved.



In the example below, new fields have been selected and added to the **Mapped Fields** section. They are listed on top of the approved fields.


Projects | Mapping | Approval | Configuration
Kenexa
XML Integrations
Self Service Mapping -- LSProject
demo-intl
Integration Type
Requisition Import
Integration Instance
LSRqImpt
Select Sources
Advertising Costs
Approval Routing
CNPDelivery
College
DateReqPosted
Department
Employee Name
Add to Mapped Fields
Field Details
Field Source Name : Standard Requisition Fields
Field Name : DateReqPosted
Field Type : Text
Mapped Fields
FIELD SOURCE
FIELD NAME
DATA TYPE
DESTINATION FIELD NAME
DESTINATION FIELD TYPE
XML TAG
Standard Requisition Fields
DateReqPosted
Text
DATEREQPOSTED
Add/Edit Details
Standard Requisition Fields
Approval Routing
checkbox
APPROVALROUTING
Add/Edit Details
Standard Requisition Fields
Title
text
TITLE
Add/Edit Details
Standard
Recruiter
select
RECRUITER
Add/Edit Details
Preview Map
Edit All Details
Save
Approval
Cancel
Sample XML

Editing Details for Previously Approved Fields

As a certified Workbench user, you cannot edit an **Approved** version of a project but you can change field details for previously mapped fields in a subsequent Draft version of a project.

To do so, navigate to the **Mapping** page for the integration type and instance you want to change in the next draft version of the project. (See "*Partially Mapped Projects*" page 26 for instructions for creating the next draft version.) In the example below, we navigated to the **Requisition Import** mapping page for the instance **LSReqImpt**.

In the **Mapped Fields** area, you can click **Add/Edit Details** for any previously mapped and approved field to access the **Field Details** page for that field and edit it as necessary. Note: You cannot delete the previously mapped and approved field. You can delete a mapped field that has not yet been approved.

Project Approval

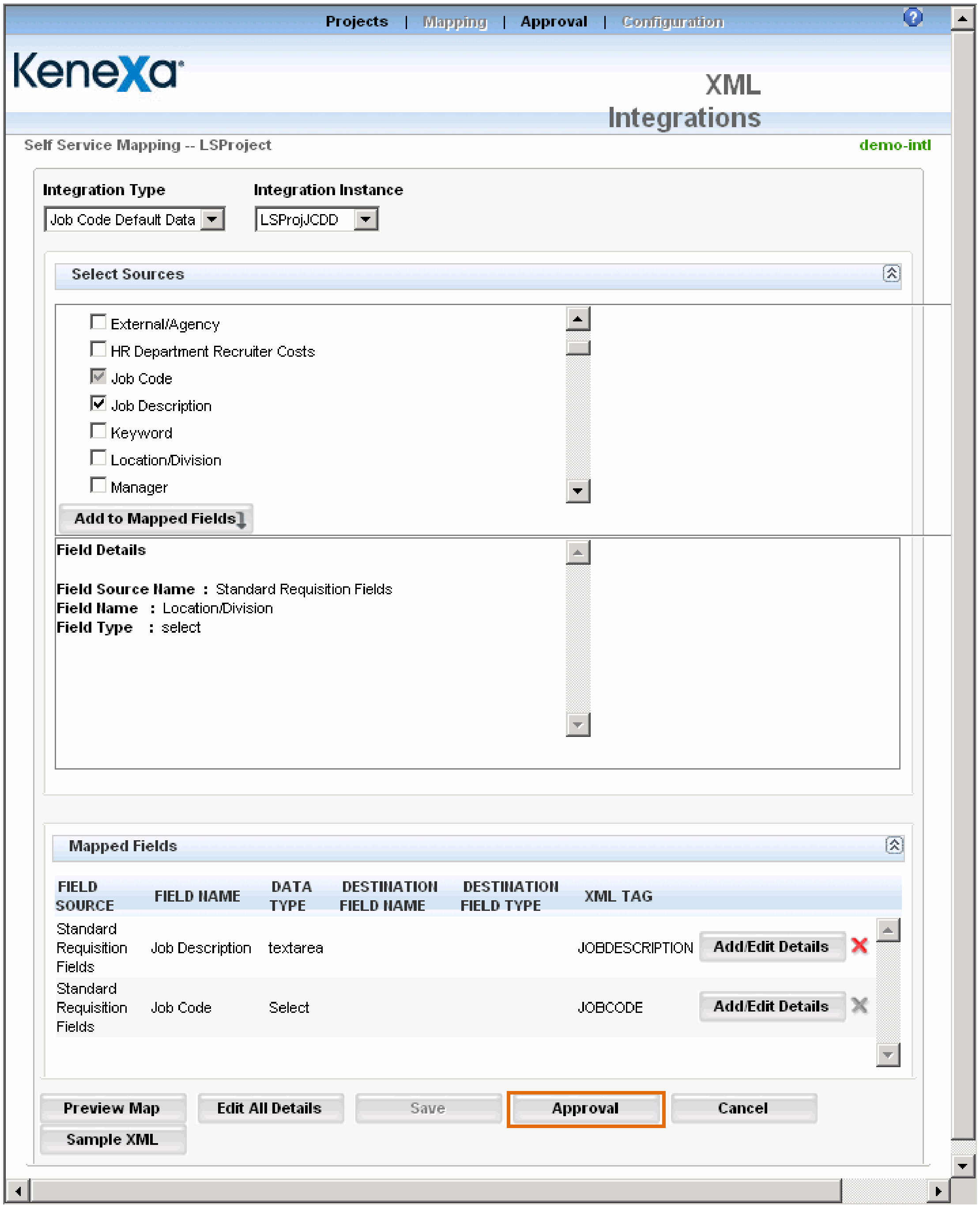
The approval process consists of the following actions:

1. **Making a version:** Usually, the designated mapping user who is part of the client's organization takes this action. In this step, you create a numbered version of the project from the draft version. You might do this immediately upon completing a substantial mapping task or you might do it after reviewing what you have mapped over several sessions. See page 32 for more information.
2. **Sending a project for approval:** Usually, the designated mapping user who is part of the client's organization takes this action. See page 34 for more information.
3. **Reviewing a project:** Usually, the designated approver is the client's assigned Kenexa Integration Consultant, and he or she takes this action. Reviewing a project results in either accepting or rejecting a project. See page **Error! Bookmark not defined.** for more information.
   - **Rejecting a project:** This is part of reviewing the project. The designated approver enters a reason for rejection and, by doing so, effectively sends the project back to the mapping user.
   - **Accepting a project:** This is part of reviewing a project. The designated approver accepts the project and, by doing so, effectively sends the project to the designated sign-off user who is part of the client's organization. The mapping user and the sign-off user could be the same person.
4. **Signing off on a project:** Usually, the designated sign-off user is from the client's organization; it could be the Mapping user or it could be someone else. Once the approved project is sent to the sign-off user, he or she signs off on the project.

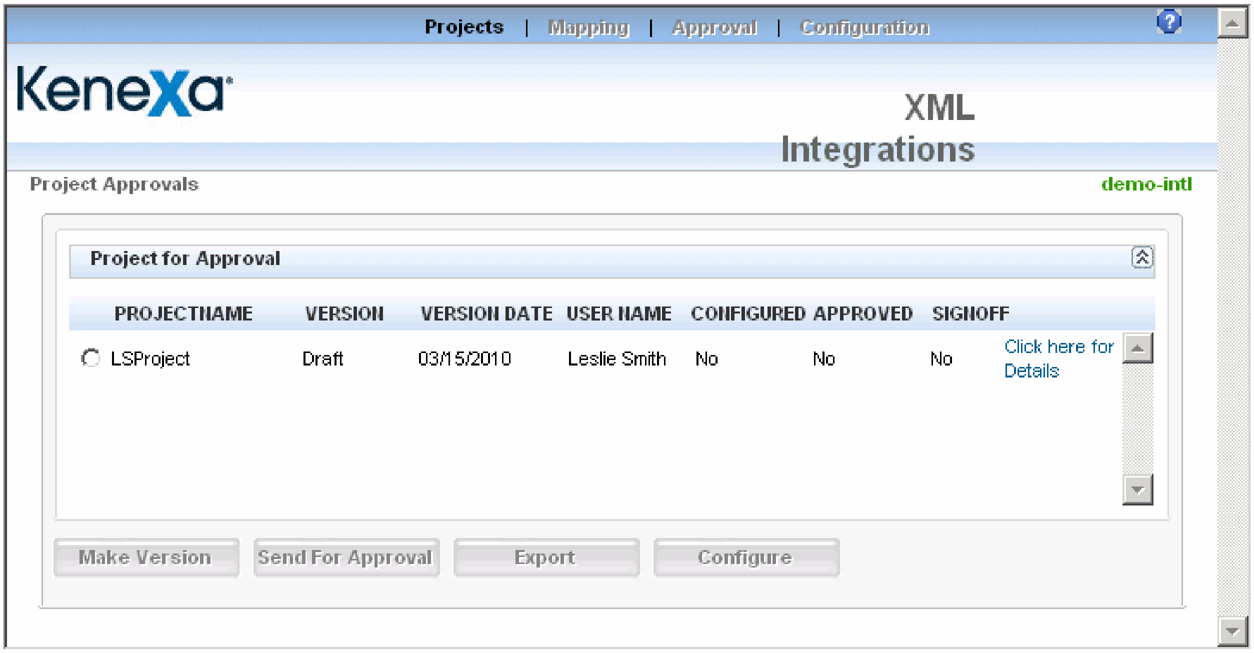
Once the project is signed off on, it is ready for configuration. See page 47 for more information.

Making the Project Version

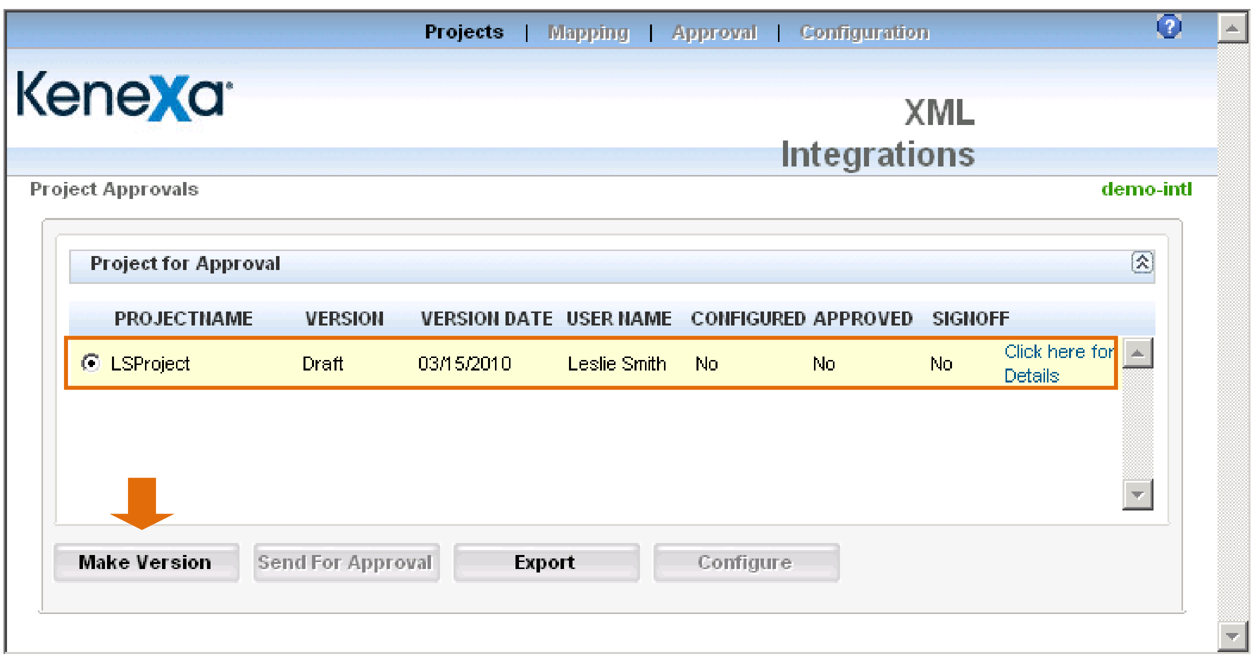
You can start the approval process immediately upon finishing a mapping task. You cannot send a Draft version of a project for approval—you must create a version first. This section describes how to make a version. In this example, we just finished mapping fields for Job Code Default Data:



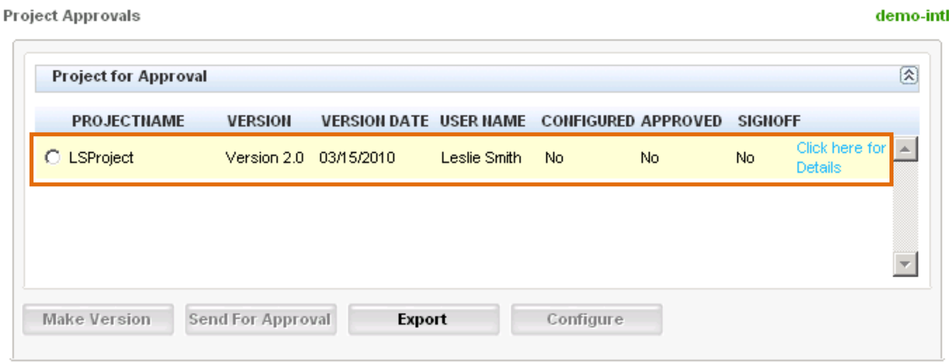
1. Click the **Approval** button at the bottom of the **Self-Service Mapping** page.
2. The **Project Approvals** page displays:



3. Select the Draft project:



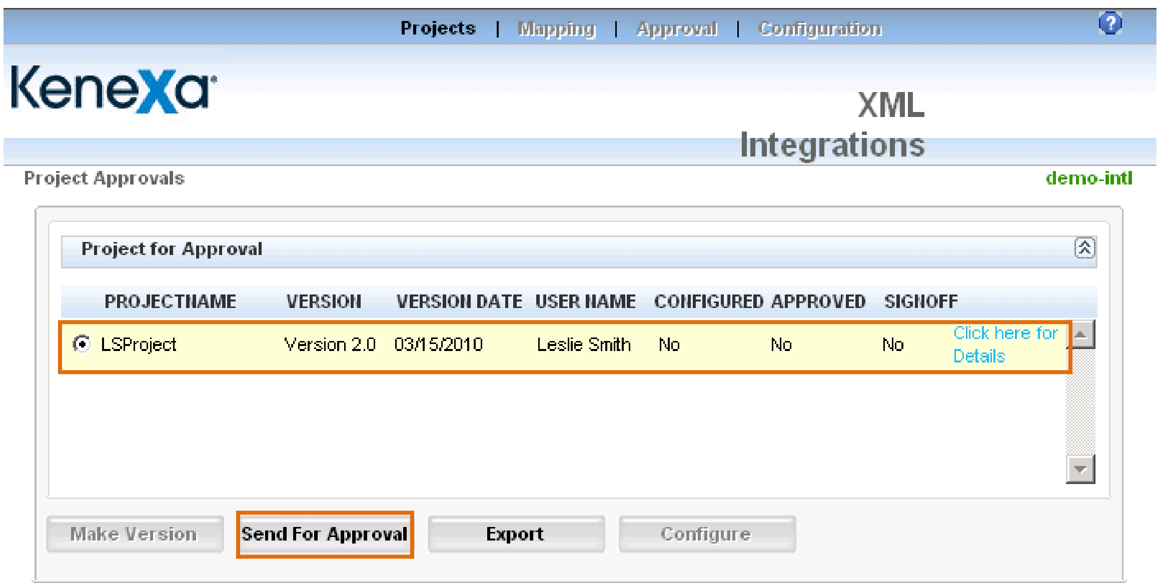
4. Click the **Make Version** button. The new version is created:



Sending the Project Version for Approval

Once the numbered version is created, the **Send for Approval** button is enabled.

1. Click the **Send for Approval** button:



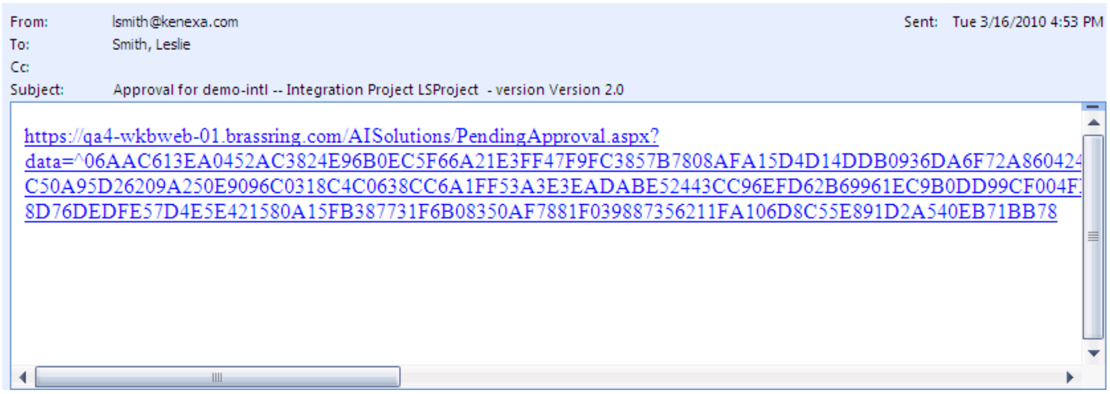
2. A message displays informing you that an e-mail notification has been sent to the designated approver, usually your company's Integration Consultant.

To understand the Approver's workflow, see page 35.

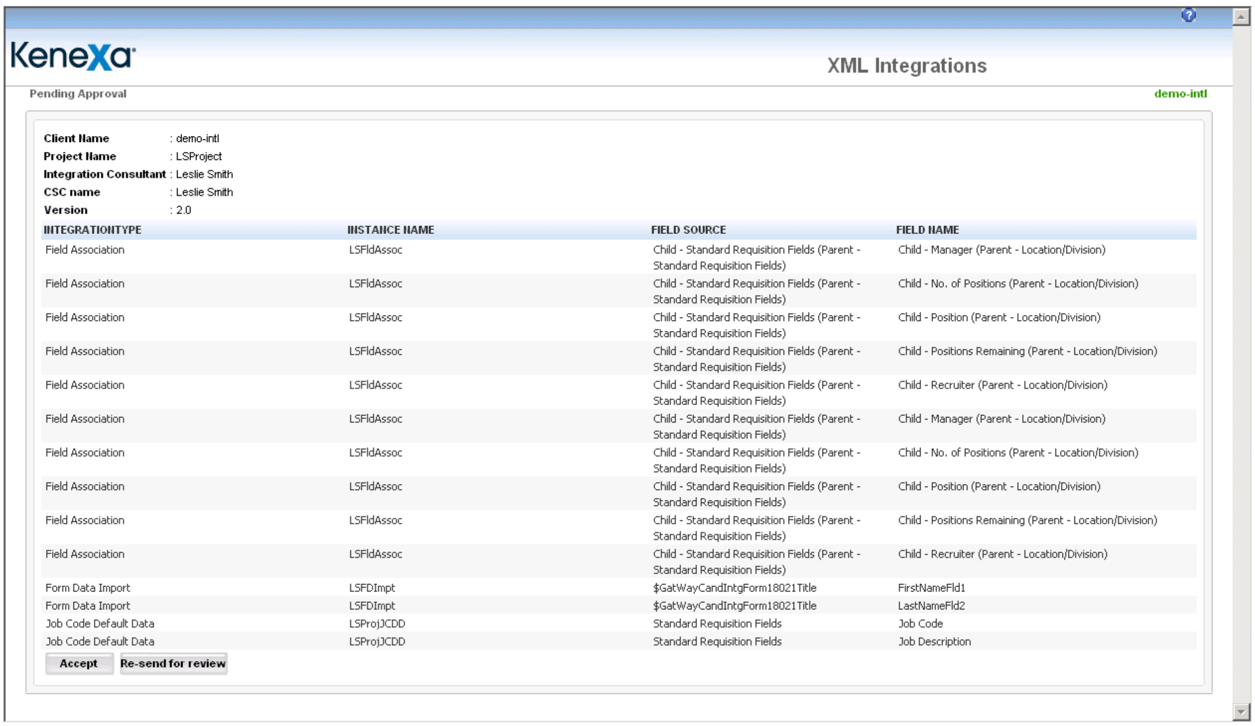
Approver's Workflow: Approving a Project Version

This section provides a brief overview of the approver's workflow.

1. The Approver receives an e-mail similar to the following:



2. The Approver clicks the link and the **Pending Approval** page for this project version appears:


Kenexa

XML Integrations

Pending Approval

demo-intl

Client Name : demo-intl
Project Name : LSProject
Integration Consultant : Leslie Smith
CSC name : Leslie Smith
Version : 2.0

INTEGRATIONTYPE	INSTANCE NAME	FIELD SOURCE	FIELD NAME
Field Association	LSFldAssoc	Child - Standard Requisition Fields (Parent - Standard Requisition Fields)	Child - Manager (Parent - Location/Division)
Field Association	LSFldAssoc	Child - Standard Requisition Fields (Parent - Standard Requisition Fields)	Child - No. of Positions (Parent - Location/Division)
Field Association	LSFldAssoc	Child - Standard Requisition Fields (Parent - Standard Requisition Fields)	Child - Position (Parent - Location/Division)
Field Association	LSFldAssoc	Child - Standard Requisition Fields (Parent - Standard Requisition Fields)	Child - Positions Remaining (Parent - Location/Division)
Field Association	LSFldAssoc	Child - Standard Requisition Fields (Parent - Standard Requisition Fields)	Child - Recruiter (Parent - Location/Division)
Field Association	LSFldAssoc	Child - Standard Requisition Fields (Parent - Standard Requisition Fields)	Child - Manager (Parent - Location/Division)
Field Association	LSFldAssoc	Child - Standard Requisition Fields (Parent - Standard Requisition Fields)	Child - No. of Positions (Parent - Location/Division)
Field Association	LSFldAssoc	Child - Standard Requisition Fields (Parent - Standard Requisition Fields)	Child - Position (Parent - Location/Division)
Field Association	LSFldAssoc	Child - Standard Requisition Fields (Parent - Standard Requisition Fields)	Child - Positions Remaining (Parent - Location/Division)
Field Association	LSFldAssoc	Child - Standard Requisition Fields (Parent - Standard Requisition Fields)	Child - Recruiter (Parent - Location/Division)
Form Data Import	LSFDImpt	$GatWayCandIntgForm18021Title	FirstNameFld1
Form Data Import	LSFDImpt	$GatWayCandIntgForm18021Title	LastNameFld2
Job Code Default Data	LSProjJCDD	Standard Requisition Fields	Job Code
Job Code Default Data	LSProjJCDD	Standard Requisition Fields	Job Description

Accept | Re-send for review

3. The Approver can approve the project or reject the project:

Approving the project: The Approver reviews the project details and, if everything is correct, clicks the **Accept** button. An email is sent back to you (or to the Mapping user if it is not you) requesting sign-off.

Rejecting the project: If the Approver finds incorrect data in the project, he or she can click the **Re-send for review** button to send the project back to the sender for review and correction. See the next section for more information.

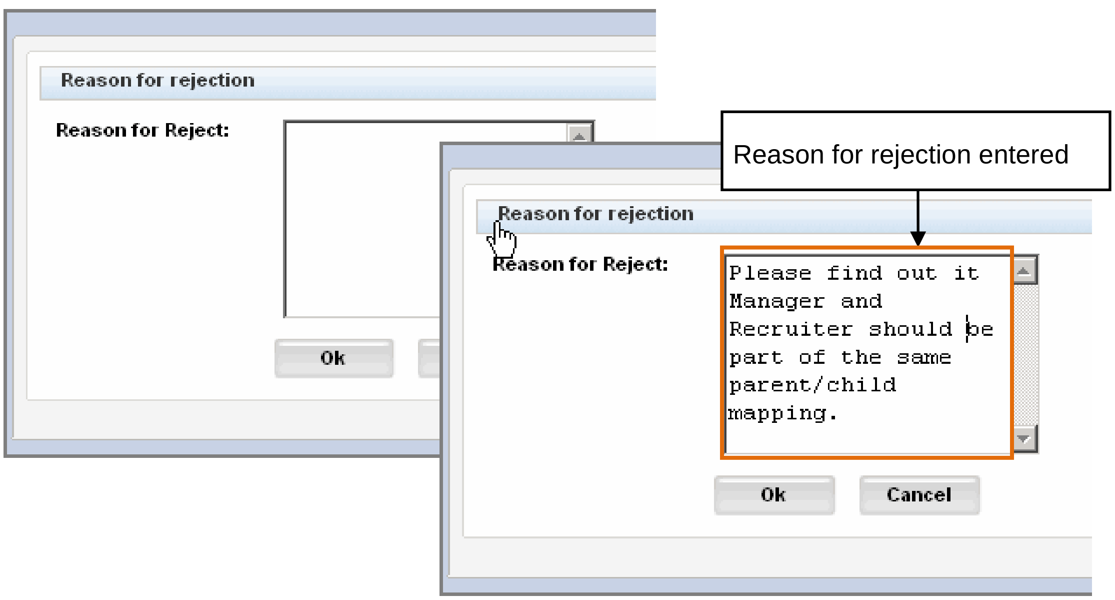
The version's status is updated appropriately on the **Project Details** page.

Approver's Workflow - Rejecting a Project Version

Approvers can reject projects. Your approver is usually your Kenexa Integration Consultant.

When your approver rejects a project for some reason, he or she has to reject a specific version of the project.

To reject the version, the approver clicks **Re-send for review**. The **Reason for rejection** window opens. The approver enters the reason(s) for rejection. The field supports up to 4000 characters.

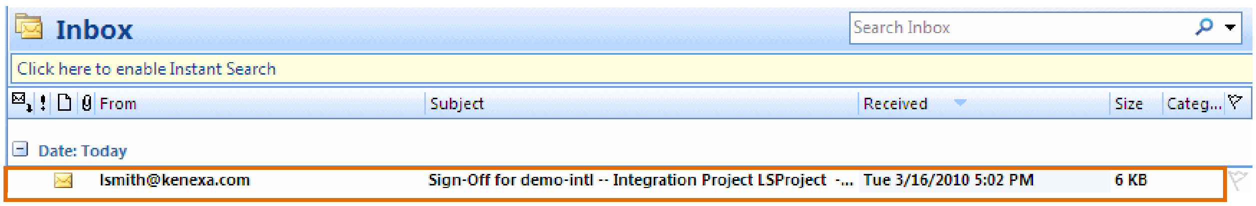


When the approver clicks **Ok**, the window closes. An email notification is sent from the email address of the Integration Consultant (or the approver) to the Mapping user who submitted the project for approval.

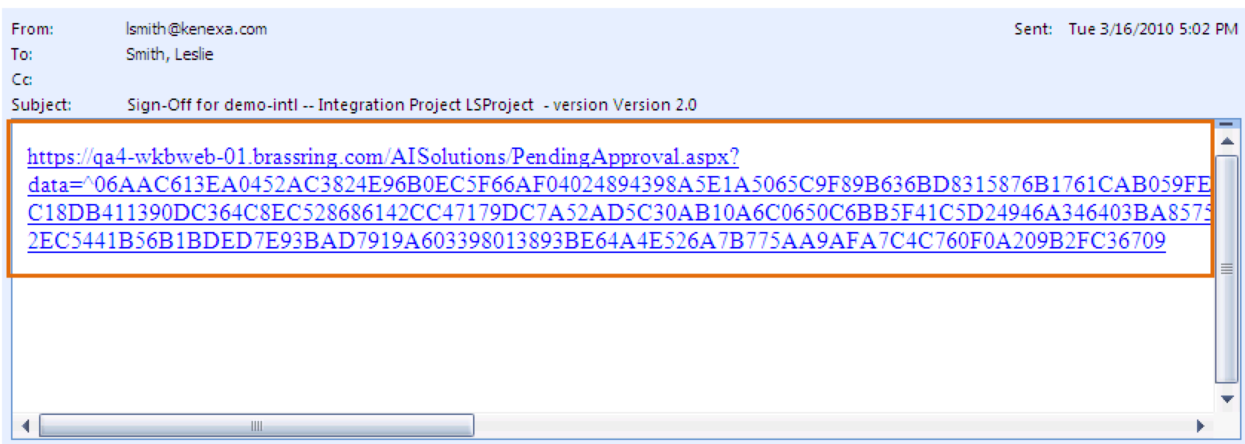
Signing Off on an Approved Project

After the project is approved, you (or the Mapping user, if it is not you) can sign off on this version of the project, which makes it available for the next step, **Configuration**. Alternatively, you can choose to “hold” the project and configure it at a later time for Staging and/or Production.

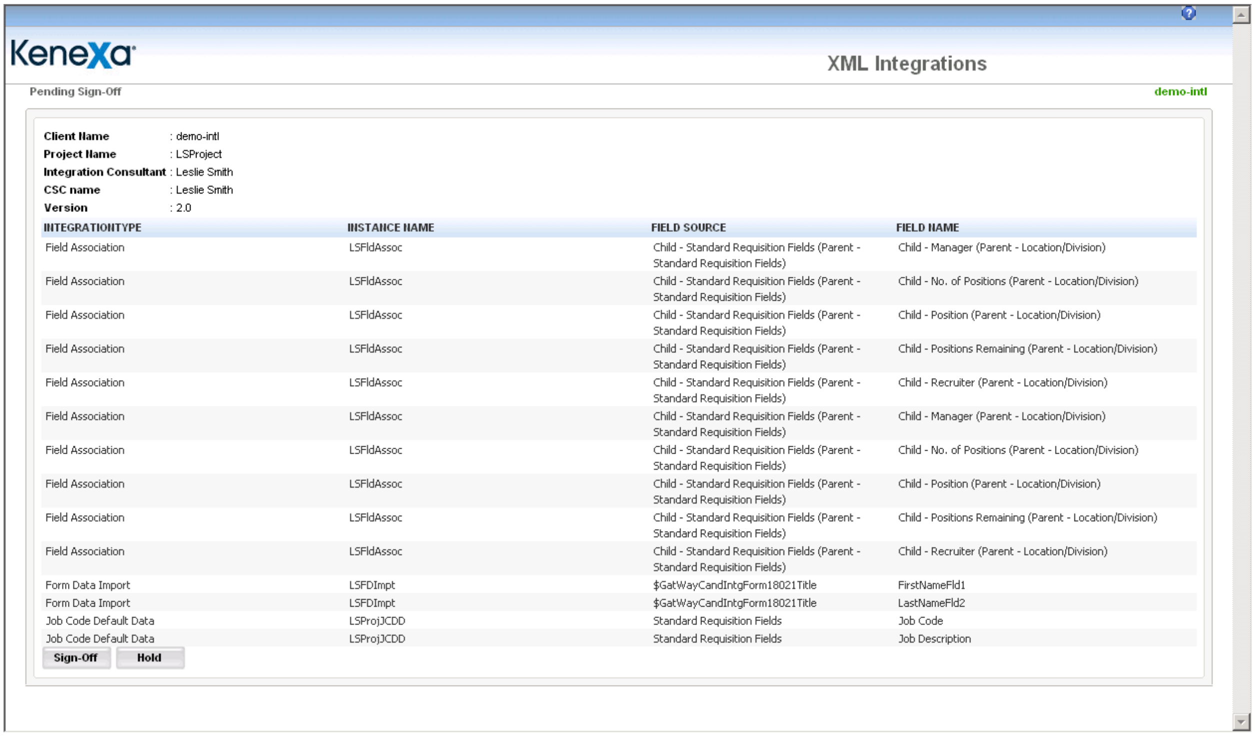
When the approver clicks **Accept** on the **Pending Approval** page for the project version, the Mapping Tool automatically generates and sends the email requesting sign-off on the project to your Inbox (or to the Inbox of the Mapping user):



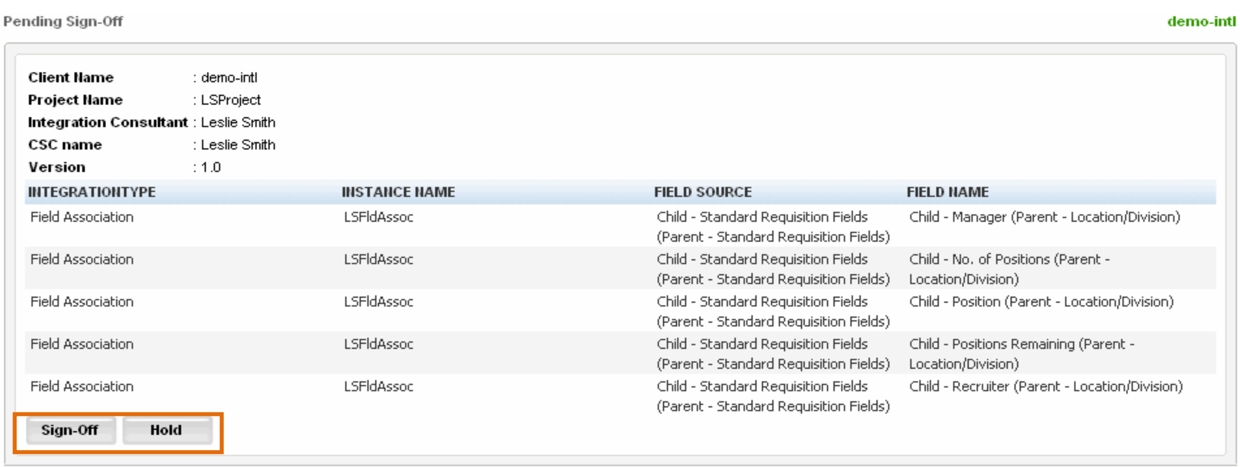
1. Open the e-mail and click on the link.



2. The **Pending Sign-Off** page for this project version opens:



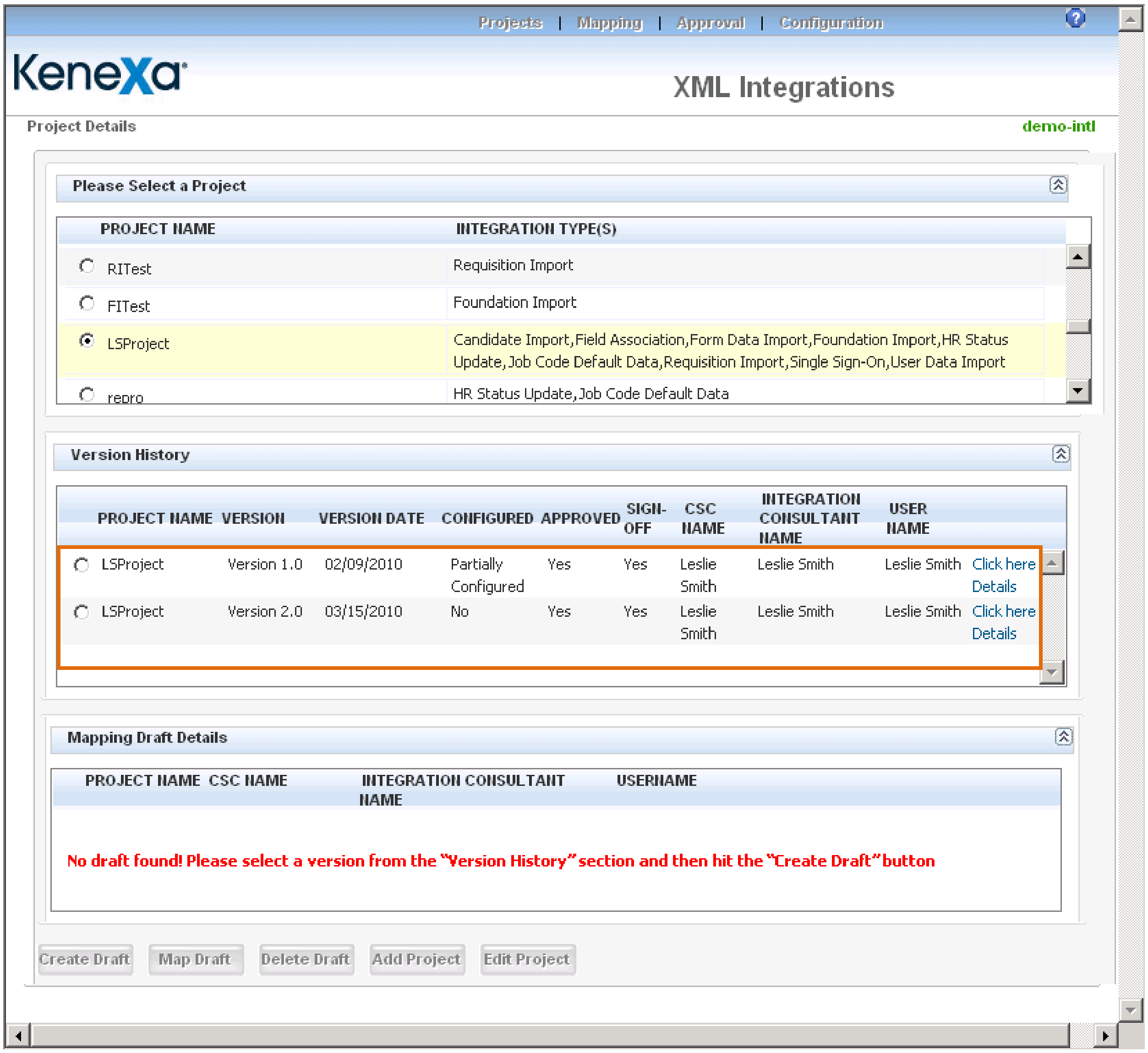
3. Review the project details. If the project is ready for configuration for Staging or Production, click **Sign Off**. If it is not yet ready, click **Hold**. If you elect to put the project on hold, you can sign off on it at any time in the future.



If you click **Sign-Off**, an email similar to the one below is sent to the designated approver.

When any user logs in to the Mapping Tool, the **Project Details** window shows the project version as both approved and signed off on. The project is ready for configuration for Staging or Production. See page 47 for information about configuration.

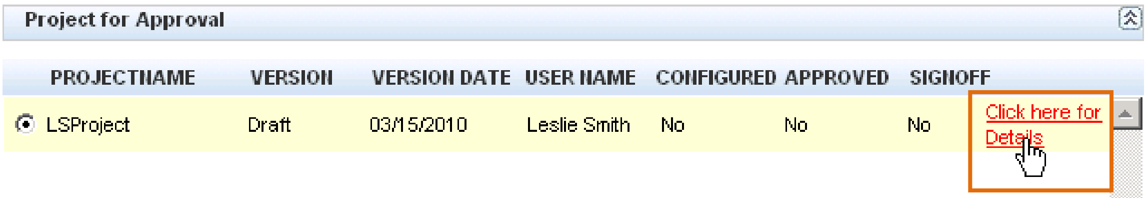
On the **Project Details** page, this project version now has the statuses of **Approved** and **Signed Off**. It is not yet configured for Staging or Production.



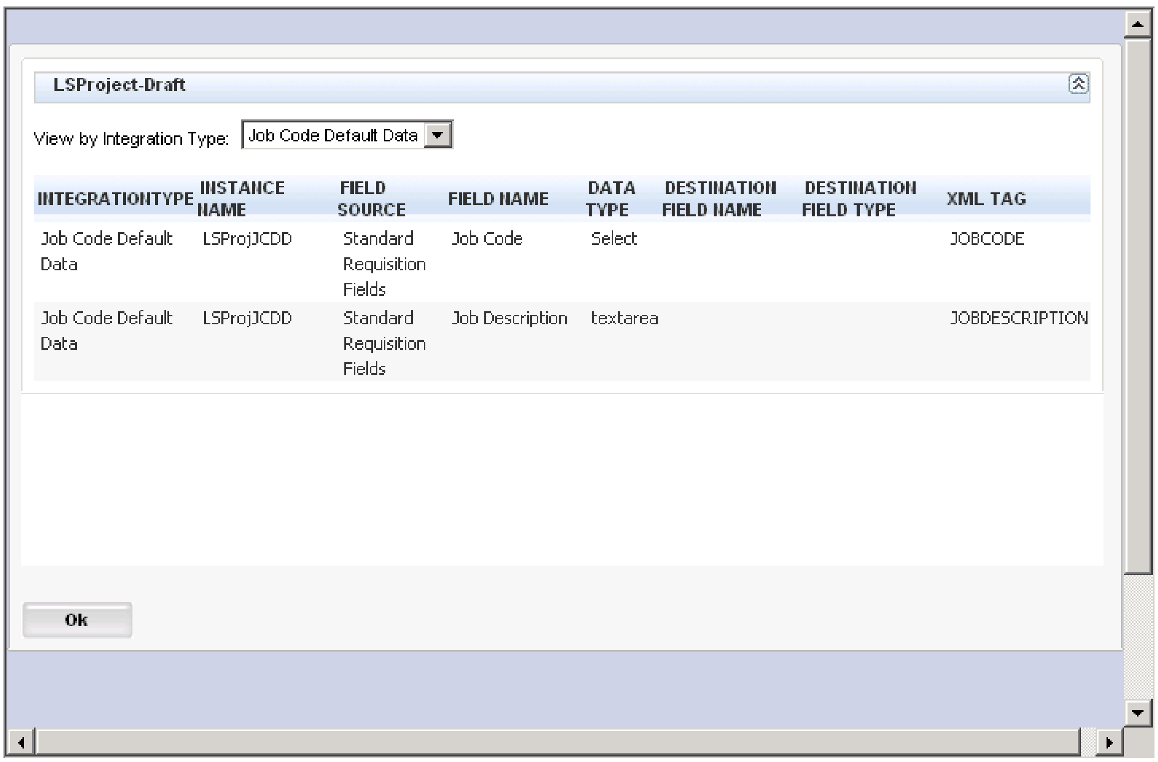
See page 47 for more information about the configuration task.

Viewing Project Details

You can view project details from the **Project for Approval** page by clicking the details link for the project.



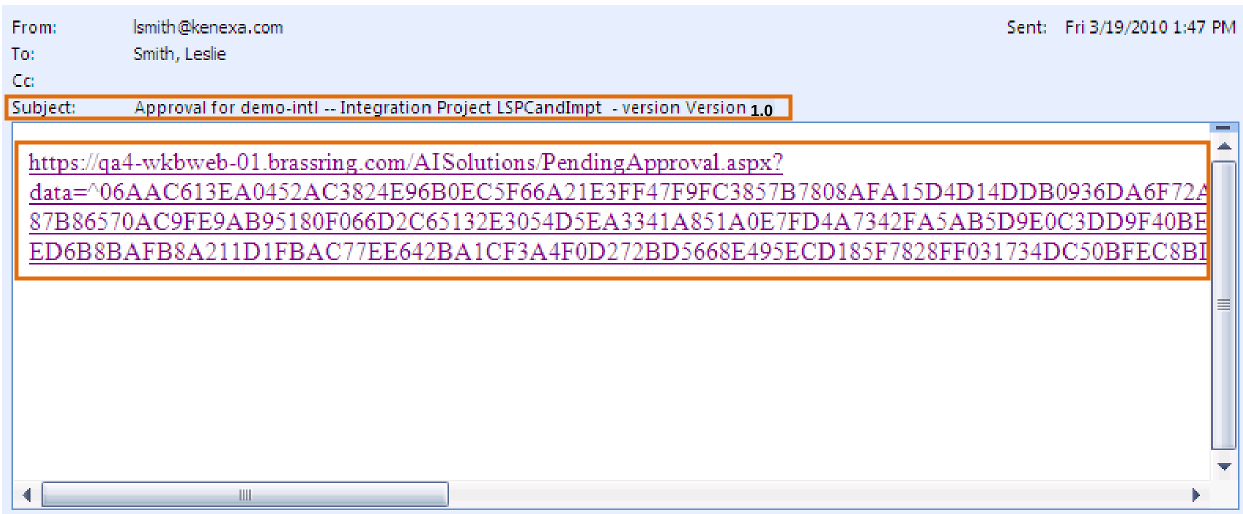
The view window for the project displays. You can view any integration type that has been configured from this window.



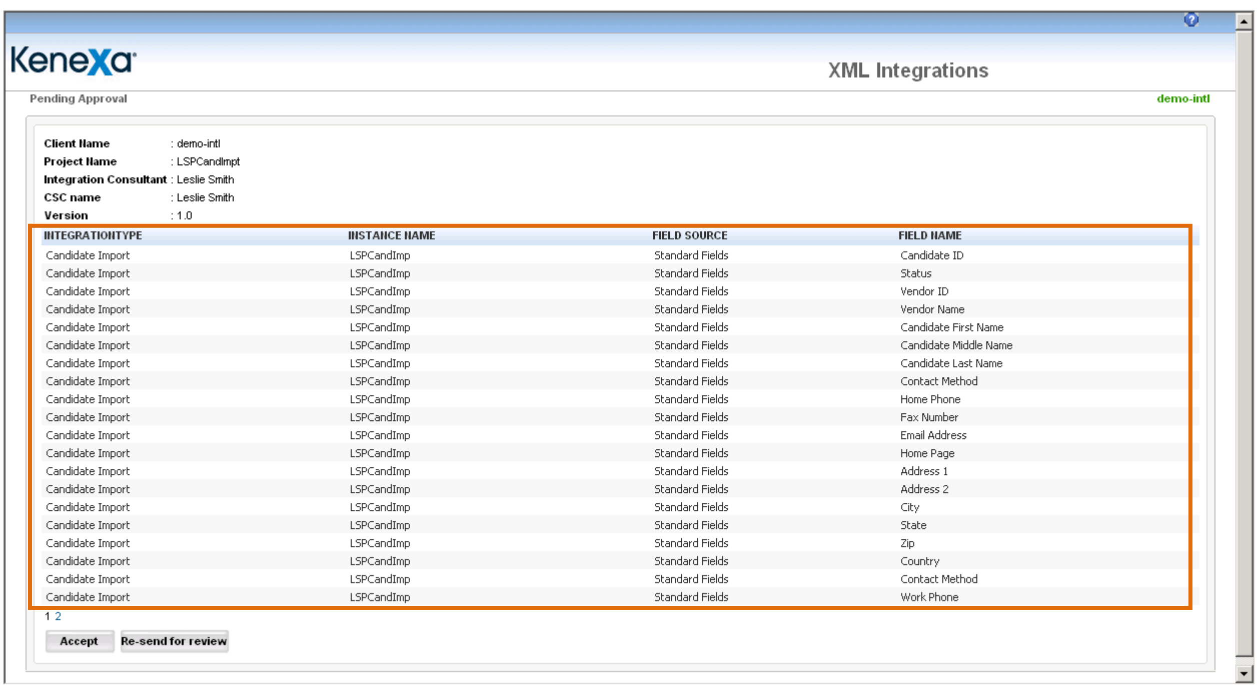
Rejecting a Project

The designated approver can reject projects for various reasons. This section describes the rejection workflow from the approver's point of view.

The designated approver receives the email asking for approval of the project:

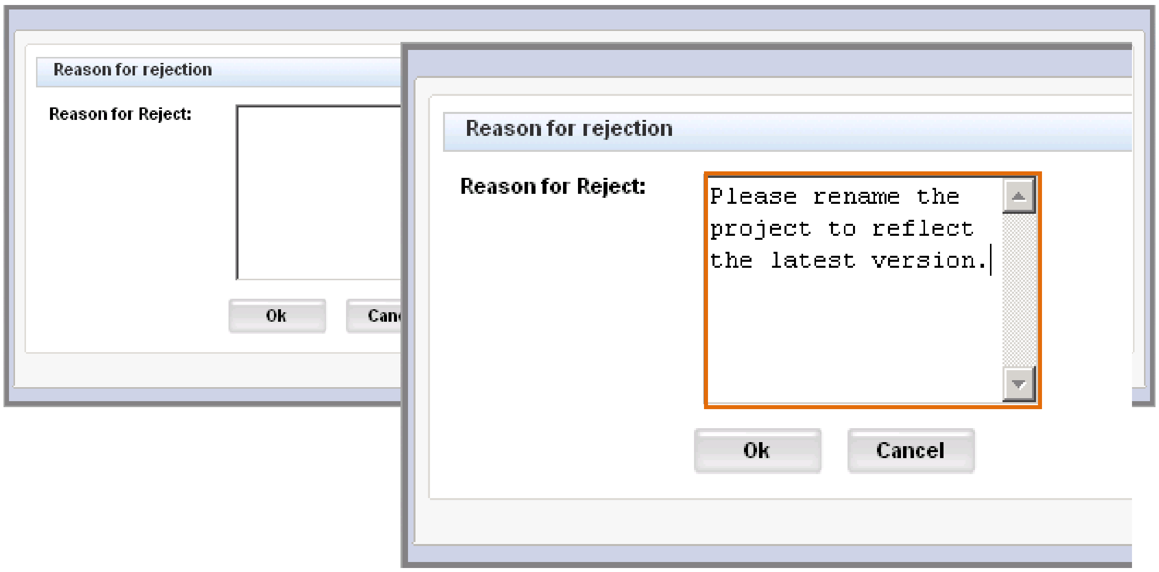


The approver clicks the link in the email. The **Pending Approval** page displays the details of the project line-by-line on multiple pages if necessary.



The designated approver reviews the project, find something incorrect or missing, and clicks **Re-send for review**.

The **Reason for rejection** window pops up. The approver enters a reason for the rejection.



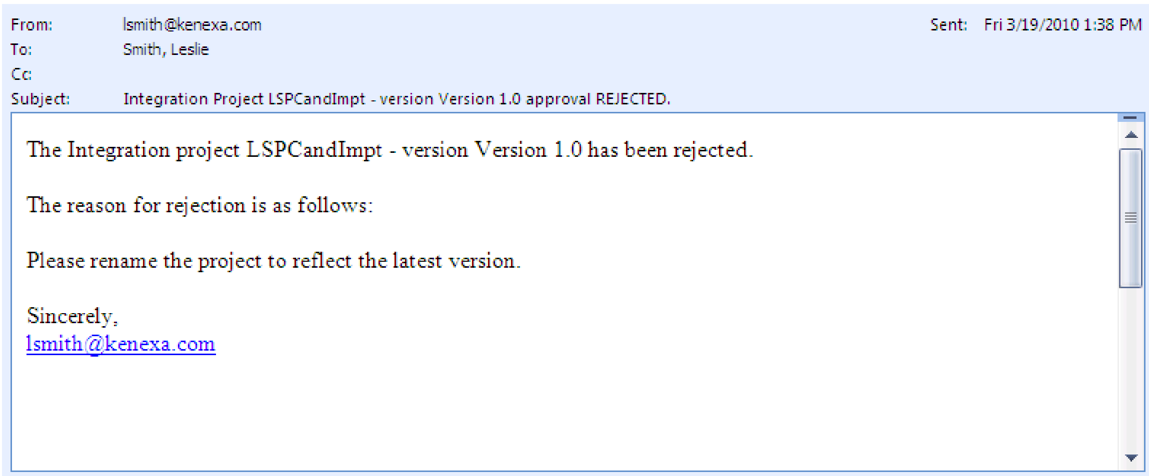
When the approver, clicks **Ok**, an email notification is sent to the mapping user. The designated mapping user who sent the project for approval receives the rejection email:

See "

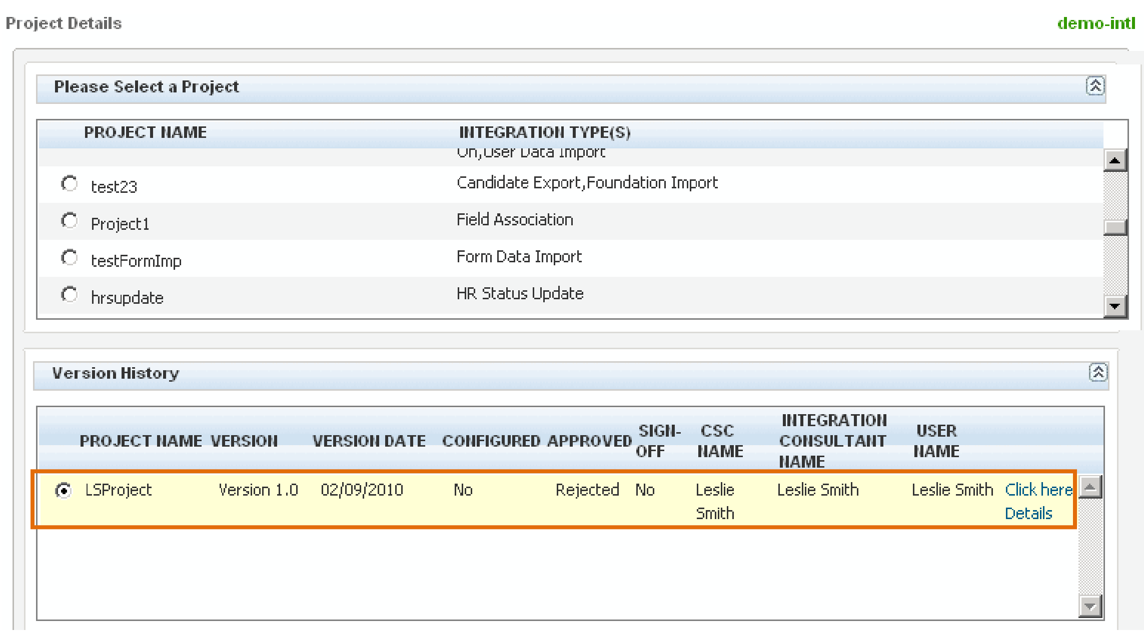
Fixing a Rejected Project" on page 44 to learn how to edit a rejected project.

Fixing a Rejected Project

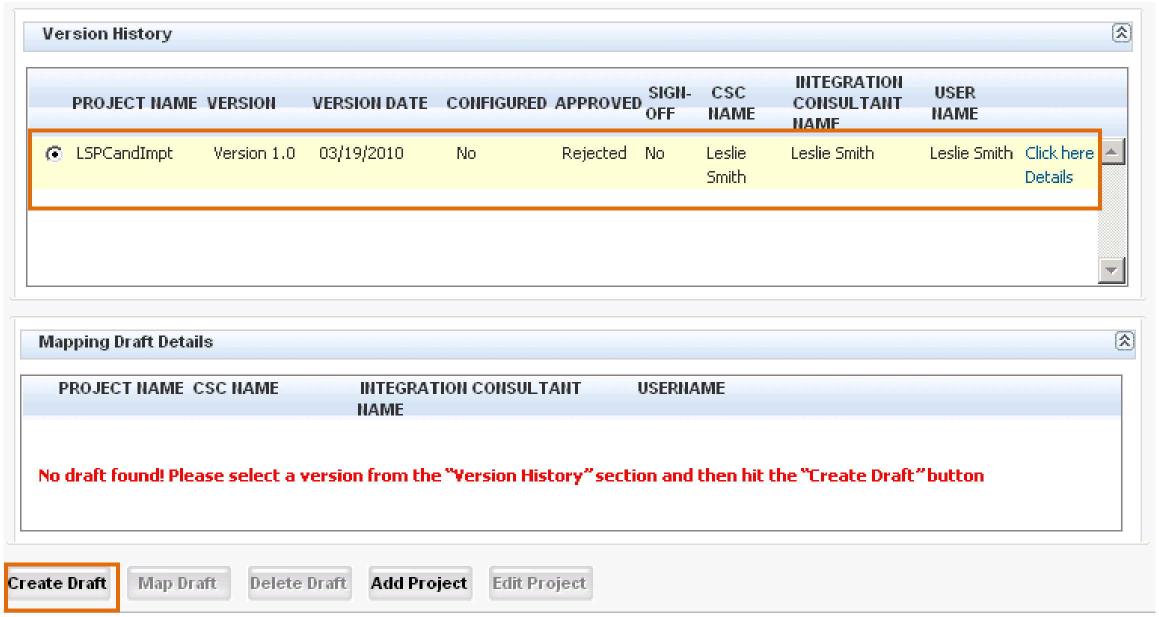
When the designated approver rejects a project that was sent for approval, you (or the Mapping user) receives an email with a reason for rejection, similar to the one below:



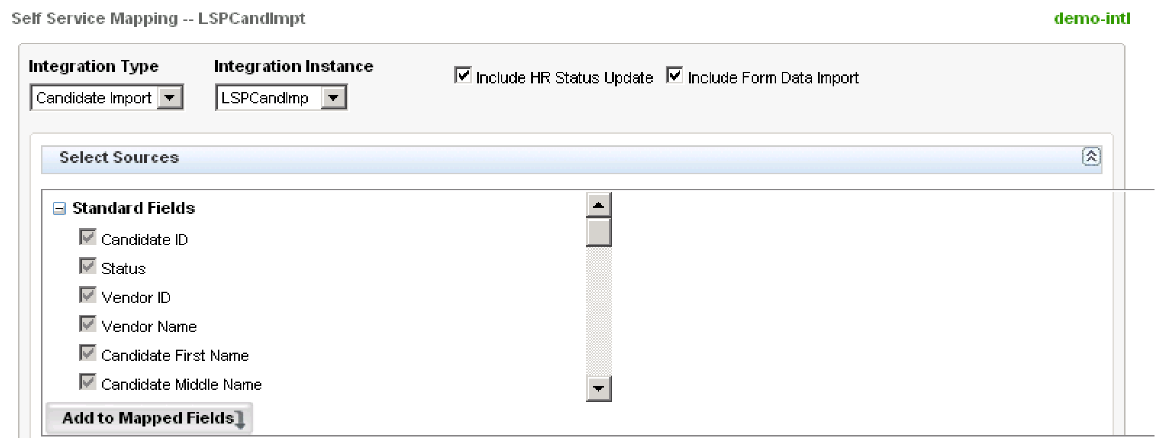
When you log into the Mapping Tool following the rejection, the status for the rejected project is listed as “Rejected” in the **Approved** column on the **Project Details** page in the **Version History** section:



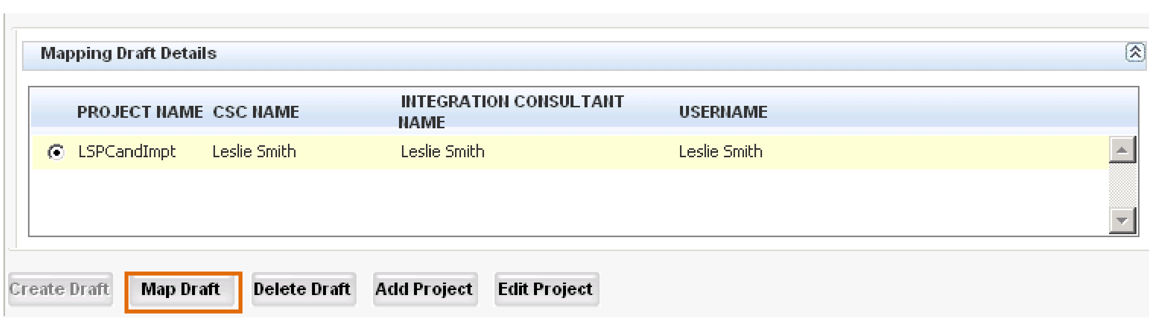
To edit the project, you have to create a new draft. Select the rejected project version in the **Version History** section of the page and click **Create Draft**.



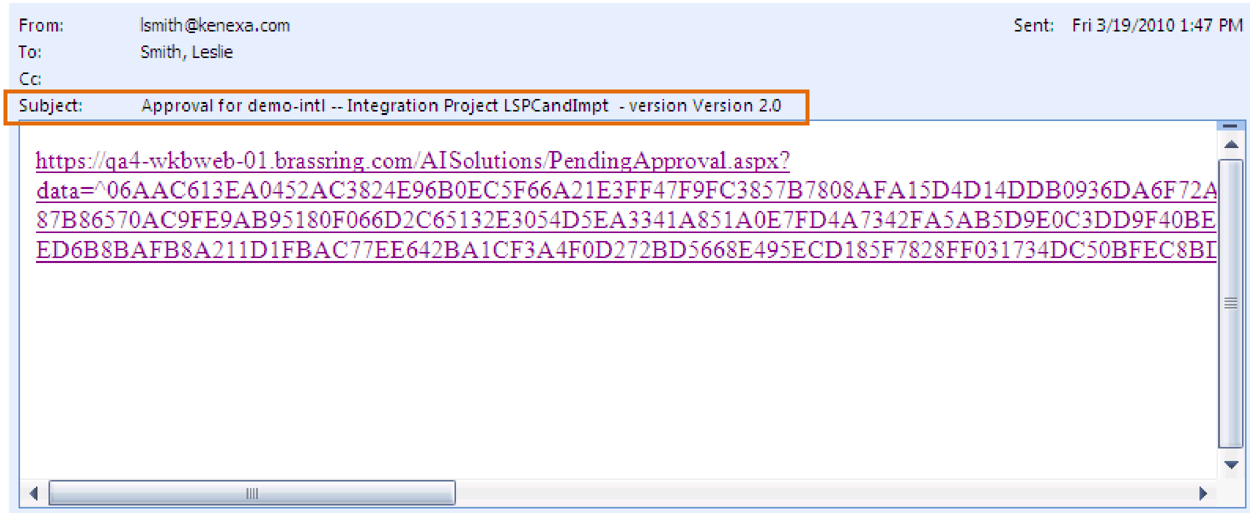
The new draft version appears in the **Mapping Draft Details** section of the page.



Select the new draft project and click **Map Draft** to return to the **Self-Service Mapping** page for this project. **Note:** Self-Service users will see the **Add Project** and **Edit Project** buttons grayed out when they are using the Mapping Tool.



Make the required changes and send the next version of the project for approval when you are ready.


From: lsmith@kenexa.com
To: Smith, Leslie
Cc:
Subject: Approval for demo-intl -- Integration Project LSPCandImpt - version Version 2.0
Sent: Fri 3/19/2010 1:47 PM

https://qa4-wkbweb-01.brassring.com/AISolutions/PendingApproval.aspx?
data=^06AAC613EA0452AC3824E96B0EC5F66A21E3FF47F9FC3857B7808AFA15D4D14DDB0936DA6F72A
87B86570AC9FE9AB95180F066D2C65132E3054D5EA3341A851A0E7FD4A7342FA5AB5D9E0C3DD9F40BE
ED6B8BAFB8A211D1FBAC77EE642BA1CF3A4F0D272BD5668E495ECD185F7828FF031734DC50BFEC8BI

Project Configuration

A project is ready for configuration when it has been both approved and signed off. On the **Project Details** page, the **Approval** and **Sign-Off** columns are both set to **Yes** for the project.

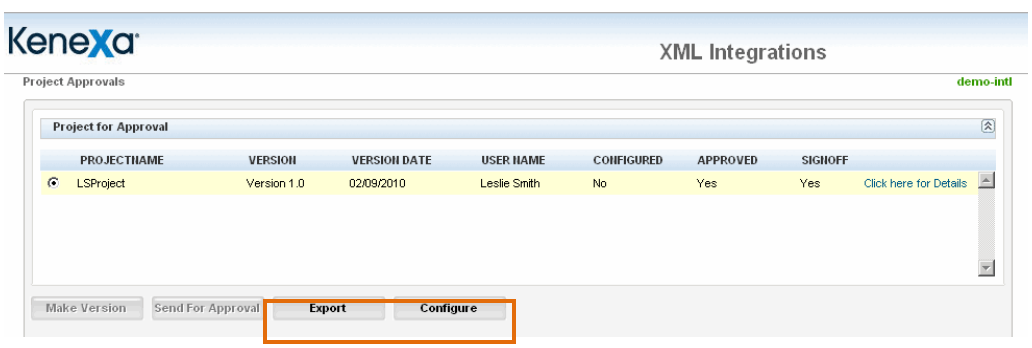
You can do Staging configuration to configure the mapping on your Staging database. You can then do Production configuration to move the finalized mapping into your Production database.

You must configure a project for Staging before it can be published to Production.

Configuring a Project for Staging

To configure a project:

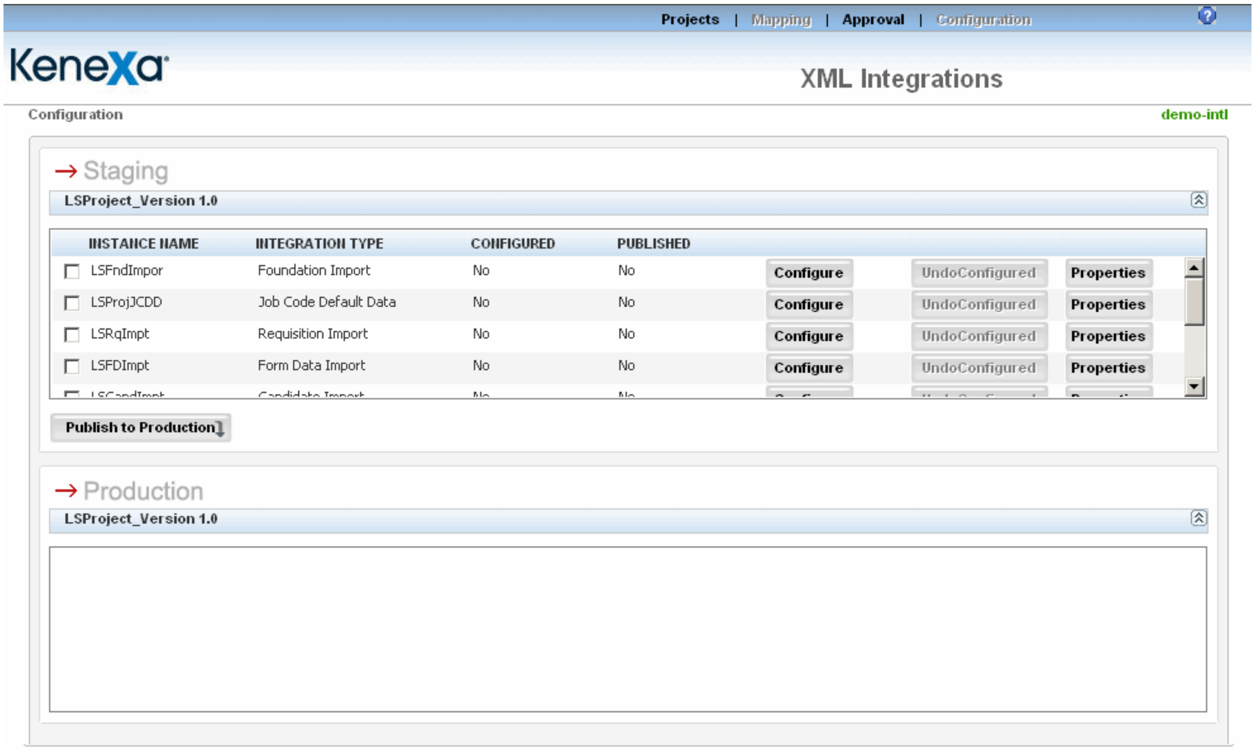
1. In Workbench, select **Tools > Integrations > Mapping Tool**. The **Project Details** page displays.
2. Select the project in the top section of the page. When the page reloads, all of its versions are listed in the **Version History** section (if they exist).
3. Select the project version to be configured in the **Version History** section of this web page. On the **Project Details** page, the version is listed as approved and signed off on.
4. Click **Approval** in the top navigation bar. The **Project Approvals** page opens for the selected project.



Note: If desired, you can export the project details to Excel before configuring this version.

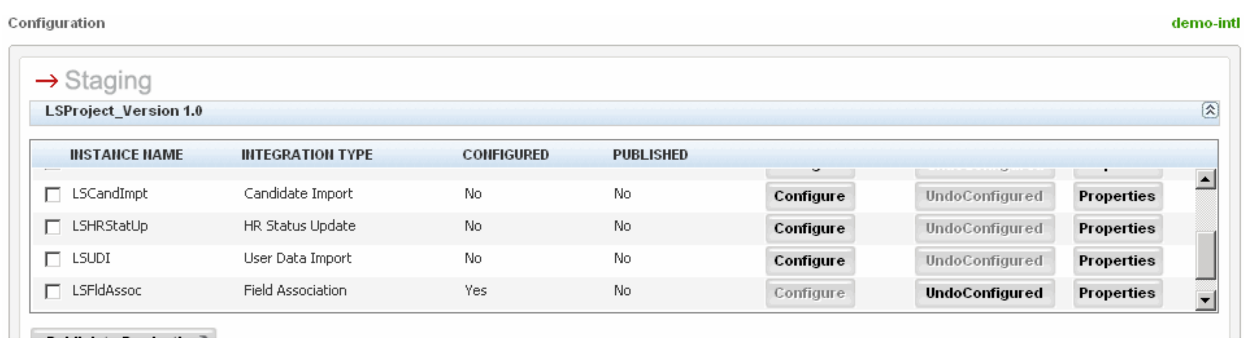
5. Click **Configure**. The **Configuration** page displays. It has two sections, **Staging** and **Production**.

The first time you configure a staging project, the **Configured** and **Published** columns are set to **No** for each integration type/integration instance contained in the signed-off project, as shown below.



To view the properties an instance, click the **Properties** button in its row. The properties are displayed in a separate window. You can add and/or edit properties from this window if desired.

To configure the instance, click **Configure**. Clicking this button configures the mapping information associated with this instance in the client's Staging database. Once an instance is configured, the **Configure** button is grayed out and the **Undo Configure** button becomes active.



To undo the configuration of an instance, click **Undo Configured**. Clicking this button deletes the configuration for the instance in the client's Staging database.

The **Published** column is set to **No**. It indicates whether an instance has been published to the Production database or not. If this column is set to **Incomplete**, it indicates that the project is partially published. You can click the **Incomplete** link to see the **Conflict Report** page.

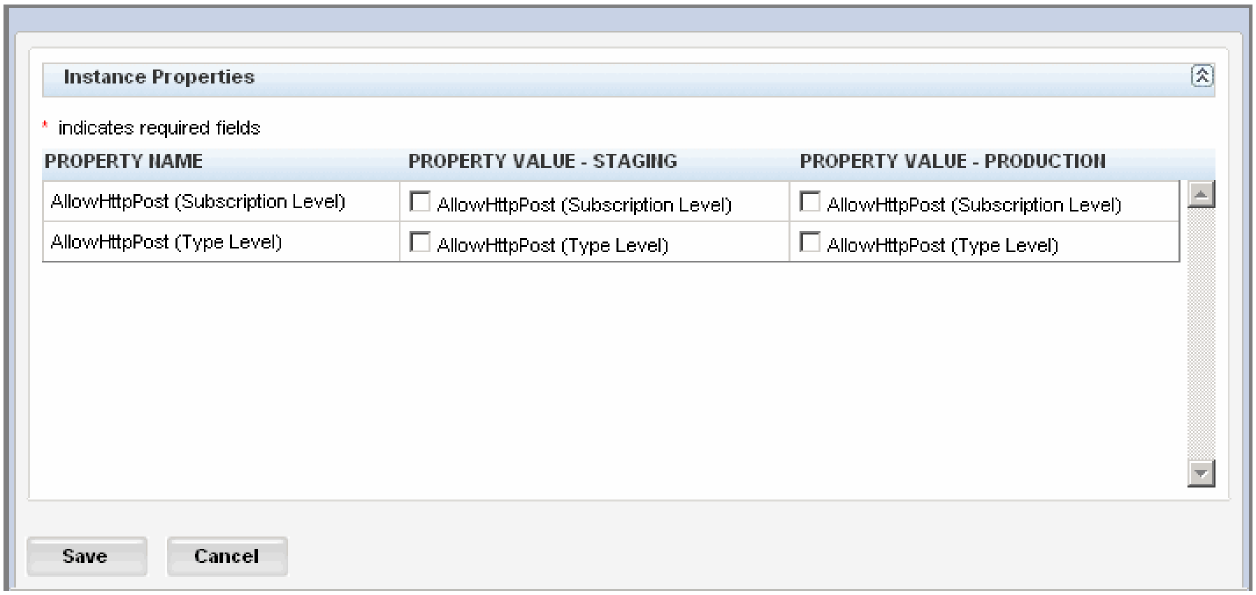
Once you click **Configure** for an instance, the **Publish to Production** button become active. Only a configured instance or project can be published to production. See “

Publishing to Production" on page 51 for more information.

Instance Properties

Each integration type has exclusive properties. See the description for each integration type for more information.

Click the **Properties** button to view instance properties. This page differs for each integration type.



Publishing to Production

The Publish process takes the mapped fields present in Staging for each instance and moves the project and the instances into the appropriate place in the Production database. This action:

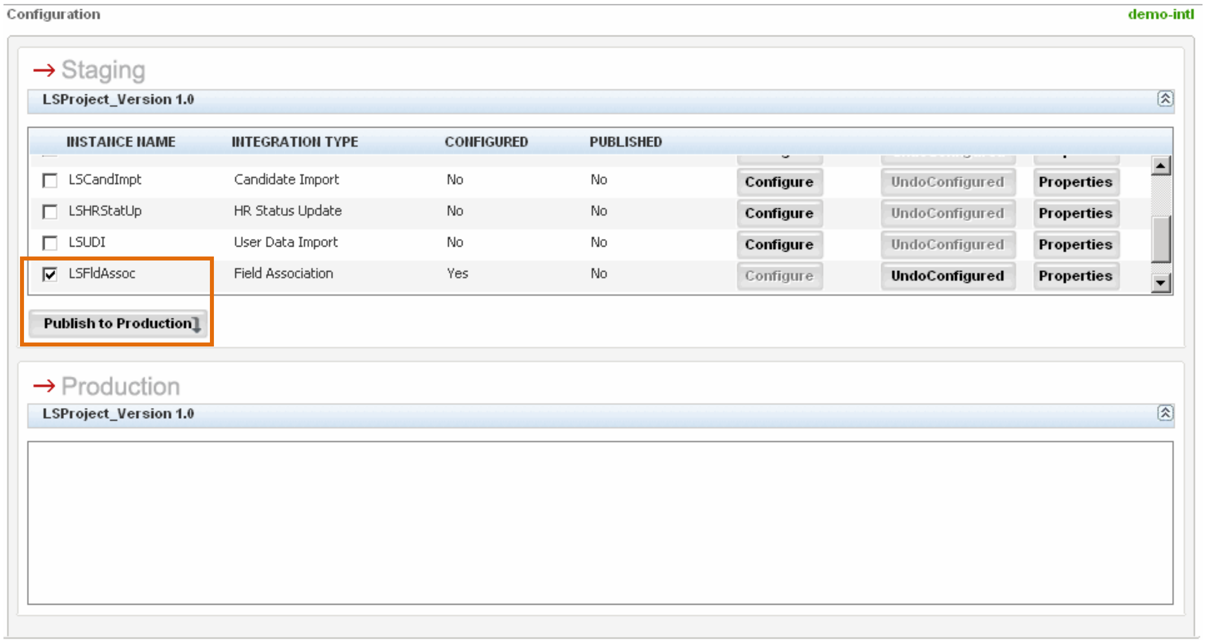
1. Creates the project and all selected instances in Production.
2. Creates all the mapping entries in Production.
3. Selects fields that are mapped for candidate and req forms and compares database field names in Staging and Production.
   a. If the database field name matches in the two databases, the updated field value is inserted into Production database.
   b. The mapped fields from the Staging database that are equivalent to fields in Production are brought over to Production.

Important: If there is a conflict, an error report is generated. There are two types of conflicts: Either the field that you are trying to publish from Staging to Production does not exist in Production, or the field has an incorrect database field name in Production. You must resolve the conflict(s) listed in the report with your CSC and correct the database field name for the conflicted fields in Production. See page x for more information.

You can select and publish a single instance or multiple instances as long as they have been configured for Staging in the Staging section of this page. You may want to publish incrementally and view production details in the Production database as you go along.

To publish to the Production database:

1. Check the check box for each instance listed in the list of instances in the **Staging** section that you want to publish.



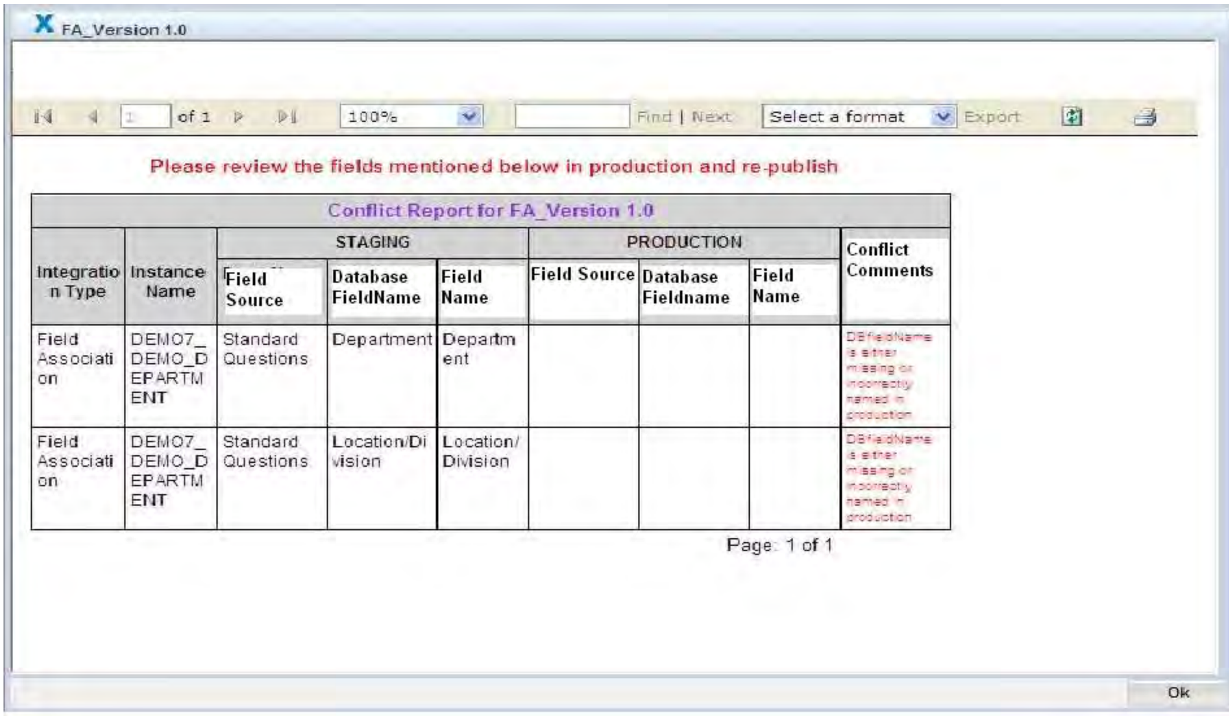
2. Click the **Publish to Production** button.

   Note: You can publish successfully only those mapped fields that are already present in the Staging database.

3. Once an instance is published to production, the **Published** column displays **Yes**.

Publish Conflict Report

The **Publish Conflict Report** describes the fields that are in conflict between Staging and Production.



The report displays in a separate window and includes the following details:

- **Integration Type:** The Integration type for the selected project
- **Instance Name:** The Instance name for the selected project
- **Staging Field Source:** The source form name from staging
- **Staging Field Name:** The source field name from staging
- **Production Field source:** The source form name from production
- **Production Field Name:** The source field name from production
- **Conflict Comment:** The comments on the conflict between the fields.

There are two types of conflicts:

- The field that you are trying to publish from Staging to Production does not exist in Production,

  OR

- The field has an incorrect database field name in Production.

You must resolve the conflict(s) listed in the report with your CSC and correct the database field name for the conflicted fields in Production. You can export the data in the **Publish Conflict Report** to Excel and save it locally if desired.

After resolving the conflict the user repeats the publish process till all the mapped fields are published to production.

Viewing Published Projects

Once the project is published, you can navigate to the Production environment to view the project details in Production.

At this stage in the workflow, you can view the **Project Details** page only. You cannot change a project from this page. The version details along with other versions that are available in Production are displayed. You can select a project and see the version history in the **Version History** section.

To see project details, select the project and click the **Click here for Details** link.

Appendix A: Reference

Table of Contents

Integration Type Details Summary Table

The following information is displayed for all integration types: Field Source, Fieldname, Data Type, Destination Fieldname, and Destination Field Type.

Integration Type	Select Source	Field Details	XML Tag	Additional Notes
Foundation Import	Click plus sign to expand the source list. Selection method: Radio button for one selection at a time. Sources come from: Standard Requisition Fields Candidate forms Requisition forms Req field index Code types Sources include field types: multi-select single-select query-select select type of questions	Includes: Form name Field name Field type	N/A	No fields are pre-selected and required. You must map one field at a time. If you add a field to the **Mapped Fields** section and then try to add another field for mapping before saving the first field, the a message warns you that you will lose unsaved information.
Job Code Default Data	Click plus sign to expand the source list. Selection method: Check boxes for multiple selections. Sources include: Standard Requisition Fields Requisition forms Not included: Req Field Index	Includes: Form name Field name Field type	Yes	You can select multiple tags from different requisition templates (“req forms” in KRB). The same XML tag is used for a field that is shared across multiple requisition templates. Job Code is required, pre-selected by default, and grayed out; it cannot be un-selected. The Job Code Default Data values are propagated to all req templates where applicable. The **formtypeid** is not specified in the XML when multiple form types are selected. The **formtypeid** is included in the XML when only one form type is selected.

Integration Type	Select Source	Field Details	XML Tag	Additional Notes
Requisition Import	Click plus sign to expand the source list. Selection method: Check boxes for multiple selections. Sources include: Standard Requisition Fields Requisition forms Not included: Req Field Index	Display only Includes: Form name Field name Field type	Yes	The following Standard Requisition Fields are required, pre-selected, checked, and grayed out; you cannot un-select them: Department, Job Description, Manager, No. of Positions, Recruiter, and Title. Other fields are optional. You can select multiple tags from different requisition templates ("req forms" in KRB). The XML can have only one tag per field shared across multiple requisition templates. The **formtypeid** is included in the XML when only one form type is selected. The **formtypeid** is not specified in the XML when multiple form types are selected.
Candidate Export – Kenexa Schema Candidate Export – Kenexa Schema with Req Candidate Export – HRXML Schema	Click plus sign to expand the source list. Selection method: Check boxes for multiple selections. Sources include: Candidate forms	Includes: Form name Field name Field type	Yes	You can select one form at a time to add to the **Mapped Fields** section. Once you add a form to the **Mapped Fields** section, if you try to select a different form and click **Add to Mapping**, the following error message is displayed: "*By clicking this button you may lose any unsaved mapping information*".
	Click plus sign to expand the source list. Selection method: Check boxes for multiple selections. Sources include: Candidate forms	Includes: Form name Field name Field type	Yes	

Integration Type	Select Source	Field Details	XML Tag	Additional Notes
	Requisition forms			
	Click plus sign to expand the source list. Selection method: Check boxes for multiple selections. Sources include: Candidate forms Requisition forms User-defined fields Candidate fields Education fields Experience fields Applicant Master fields Standard Requisition Fields Resume	Includes: Form name Field name Field type	Yes	The **Education Fields** and **Experience Fields** in the **Select Source** list are each a single option. See page 105 for additional details and sample XML.
User Import	Click plus sign to expand the source list. Selection method: Check boxes for multiple selections. Sources come from: Required fields Optional fields	Includes: Field name Field type	Yes	Required fields are pre-selected, grayed out, and added to the Mapped Fields section. You cannot un-select them. Optional fields are not selected by default. You can select one or multiple optional fields to add to mapped fields. See the list of User Data Import fields on page 82. The tags for required fields are pre-selected and display in the **XMLTag** column.
Form Data Import	Click plus sign to expand the source list. Selection method: Check boxes for multiple selections. Sources include: Candidate forms	Includes: Form name Field name Field type	Yes	Select one form at a time to add to the **Mapped Fields** section. Click **Save** after adding the form. Note: If you try to select and add a different form before you save your selection, an error message warns that you will lose unsaved information.
Candidate Import	Click plus sign to expand the source list. Sources include: Standard Fields (Note: These standard fields are specific to candidates.)	Includes: Field name Field type	Yes	All Standard Fields are required, pre-selected, grayed out and added to the Mapped Fields section already; you cannot un-select them. **Important:** If you want to include **Form Import** and/or **HR Status Update** with your **Candidate Import** for this project, you may find it easier to map **Form Import** and **HR Status Update** before mapping **Candidate Import**. **Candidate Import** has two additional options for selection:

Integration Type	Select Source	Field Details	XML Tag	Additional Notes
				Include Form Import: Select this option to include Form Import, which you or another user will configure in a separate step for this project. If any Form Data Import instances have been mapped already, a dropdown list of instances displays. For more information, see the information on Form Import in this table. When you click this check box, a list displays of all Form instances for the current project that have entries in the **Mapped Fields** section. Note: You must map at least one field for a form instance to appear in the Mapped Fields section. If no fields are mapped, the form does not appear. You can select single or multiple instances of **Form Import**. Once selected, the form details are added the **Mapped Fields** section under the selected form. A selection here applies only to the current instance of **Candidate Import**. If the option **Include Form Import** is unchecked, the association with the selected Form Import is removed. **Include HR Status Update**: Select this option to include the **HR Status Update**, which you or another user will configure in a separate step for this project. If any HR Status Update instances have been mapped already, a dropdown list of instances displays. For more information, see the information on HR Status Update in this table. . When you click this check box, a list displays of all HR Status Update instances for the current project that have entries in the **Mapped Fields** section. Note: If the fields are not mapped for the HR Status Update instance, the HR Status Update instance does not appear. You can select single or multiple instances of HR Status Update. Once selected, the form details are added the **Mapped Fields** section

Integration Type	Select Source	Field Details	XML Tag	Additional Notes
				under the selected instance. A selection here applies only to the current instance of Candidate Import. If the option **Include HR Status Update** is unchecked, the association with the selected HR Status Update is removed.

Suggested Mapping Order for Integration Types

Each integration project consists of the collection of integration types purchased by your organization for that project. For each integration project, you must map one or a series of integration types in the order prescribed by your CSC. The purpose of the information in this section is to provide general guidelines but should not be substituted for the specific guidelines provided by your CSC.

The *Integration Type Details Summary* table on page 56 summarizes business rules for all integration types. The sections for each integration type include the information from the summary table.

You can map, approve, and configure for publication incrementally. For example, you can map values for the User Import integration, send it for approval, and configure the approved mapping for publication in the Staging database.

The list below presents the suggested order for mapping integration types as part of integration projects. Note: Your organization might have purchased only some of the integration types listed below for its integration project or projects.

Import and Update

1. Foundation Import (Requisitions). See page 84
2. Job Code Default Data (Requisitions). See page **Error! Bookmark not defined.**.
3. Requisition Import (Requisitions). See page **Error! Bookmark not defined.**.
4. User Import. (Users). See page 62.
5. Foundation Data Import (Candidates)
6. Form Data Import (Candidates). See page **Error! Bookmark not defined.**.
7. HR Status Data Import (Candidates). See page **Error! Bookmark not defined.**.
8. Candidate Import (Candidates). See page 89.

Export

The Mapping Tool supports three candidate export schemas:

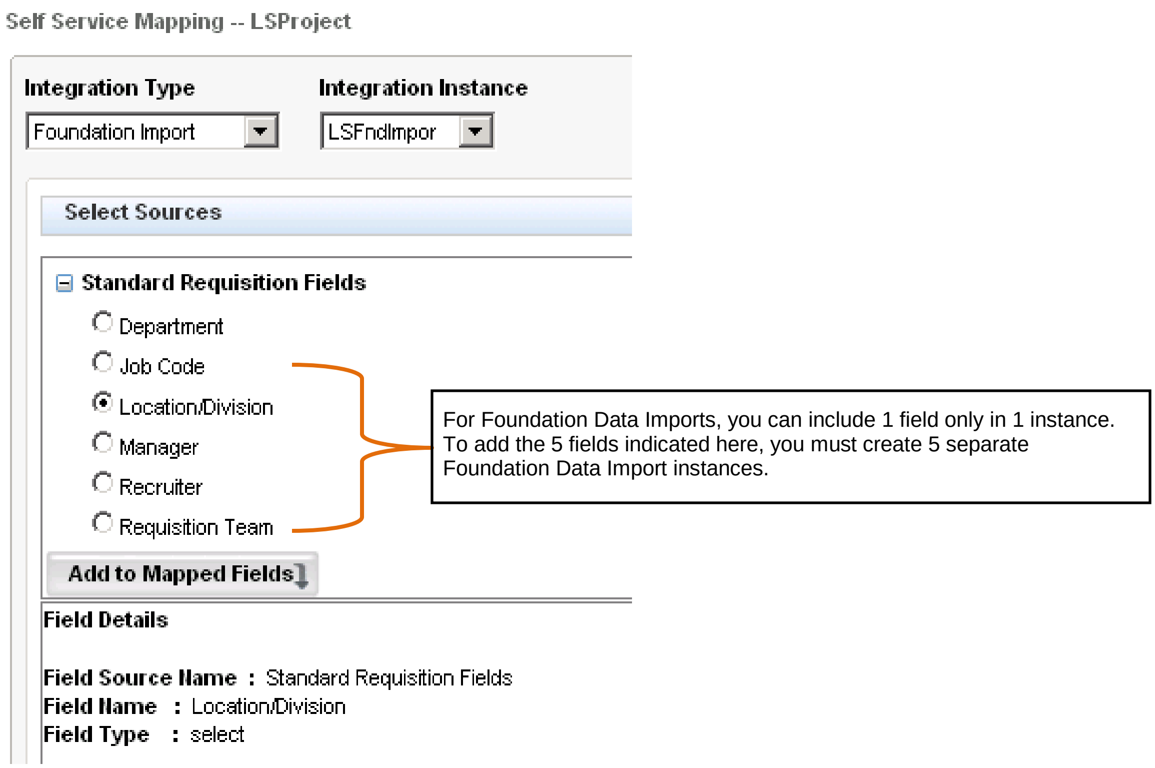
- Candidate Export – Kenexa Schema. See page 102.
- Candidate Export – Kenexa Schema with Req. See page 102.
- Candidate Export – HRXML Schema. See page 102.

Foundation Data Import Integration Type

Follow the instructions starting on page 7 for creating a draft and mapping an instance of an integration type.

Foundation data include both requisition and candidate data. You can do imports for these two types of data separately. See page 61 for information about the suggested mapping order for integration types.

For foundation data import mapping, you can map *only* one field per instance of an integration type. For example, if you want to map several Standard requisition fields (**Job Code**, **Location/Division**, **Manager**, **Recruiter**, and **Requisition Team**) as part of your foundation data import, you must create a new, separate instance to map each of the fields listed. In the example import suggested above, you would have to create 5 separate instances for the Foundation Data Import integration type.



Editing a Foundation Data Import Instance

WARNING: If you create a second or subsequent version of a project, intending to perform additional mapping for that project, there are some integration types that you should not edit unless you actually want to change them. For foundation data imports of any type (requisition data or candidate data), you can select only one field per Foundation Data Import instance. If you try to select another field for the same instance, Workbench displays a warning message. If you continue with the action, your previous field selection for that instance is discarded and only the new selection appears.

Mapping a Foundation Data Import Instance

This section describes how to complete the mapping page for a Foundation Data Import. You can select one item per instance. Foundation Data Import sources come from:

- Standard requisition fields
- Candidate forms
- Requisition forms
- Req field index
- Code types

Sources can be of the following field types:

- multi-select
- single-select
- query-select
- select type of questions

You can map:

- Form name
- Field name
- Field type

Warning: You can add one (1) field to the **Mapped Fields** list for each intance you create. If you try to add another field to **Mapped Fields** list, the system warns you that will lose your first selection.

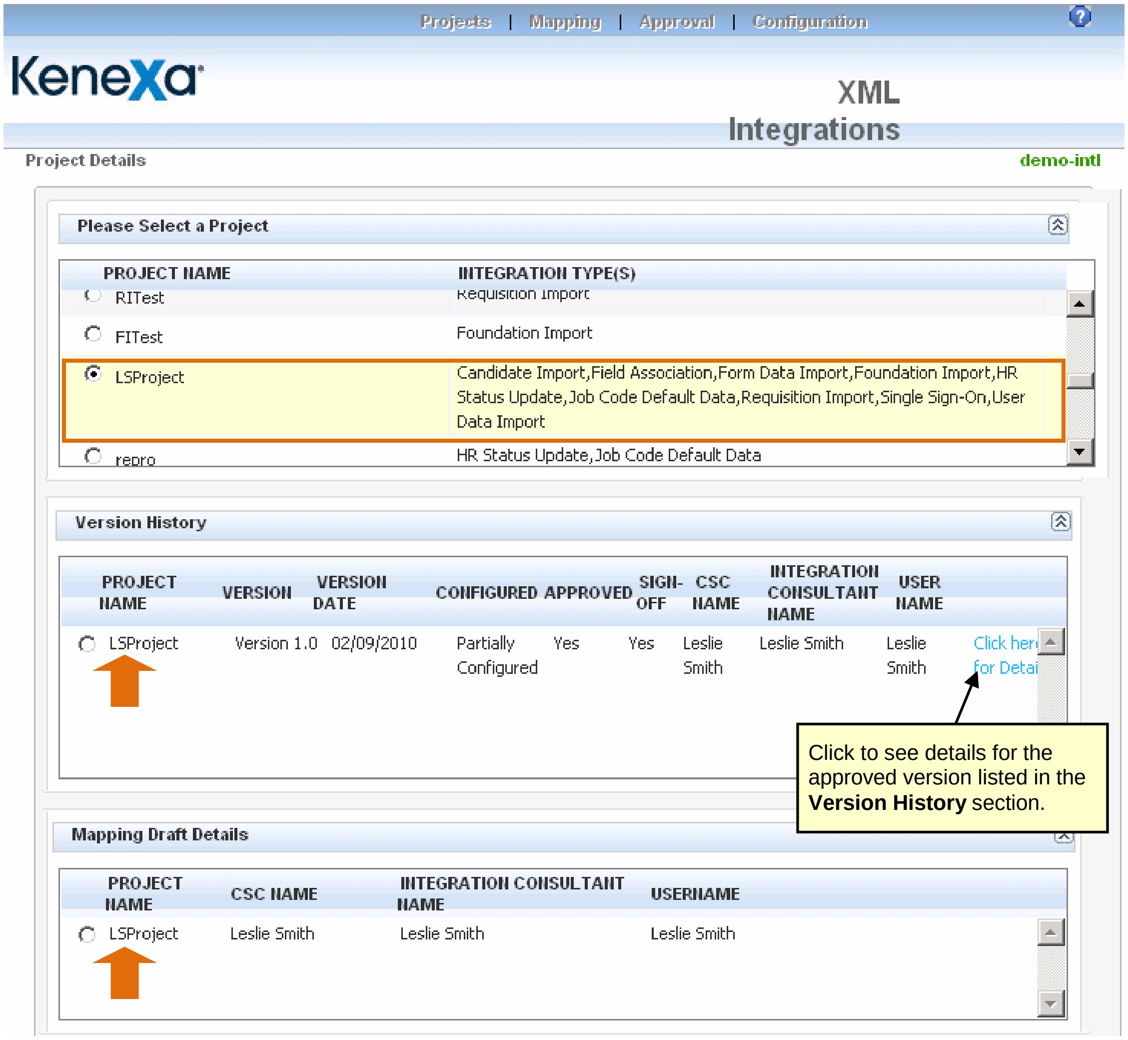
These instructions assume you have already created a draft project and clicked **Map Draft** to display the **Mapping** page. See page 7 instructions for creating a draft project.

Your Kenexa Integration Consultant must create one instance per field to be mapped as part of the Foundation Data import for this project. We recomment that you name instances in an informative manner so that the Mapping user knows which instance to select when he or she resumes the mapping task.

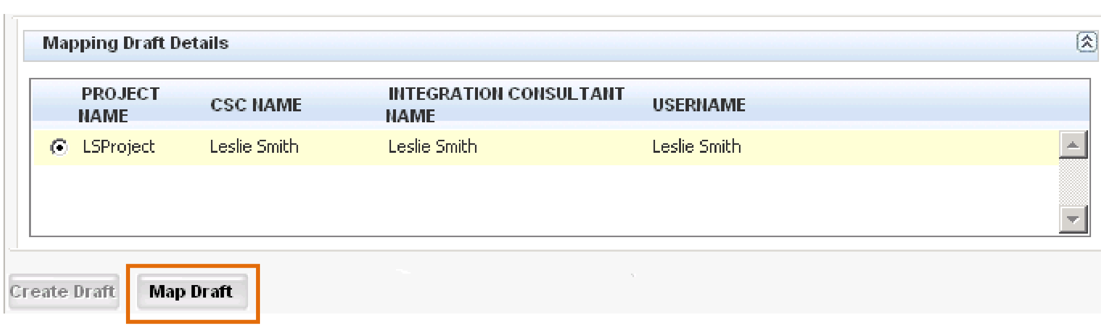
To map a field for a Foundation Data Import:

1. Log in to Workbench.
2. Select **Integrations > Mapping Tool**. The **Project Details** page displays.
3. On the **Project Details** page, select the radio button for your project in the project selection area at the top of the page.
4. All versions and draft versions on that project appear in the appropriate section on the page. They are not selected, as shown in the image below.

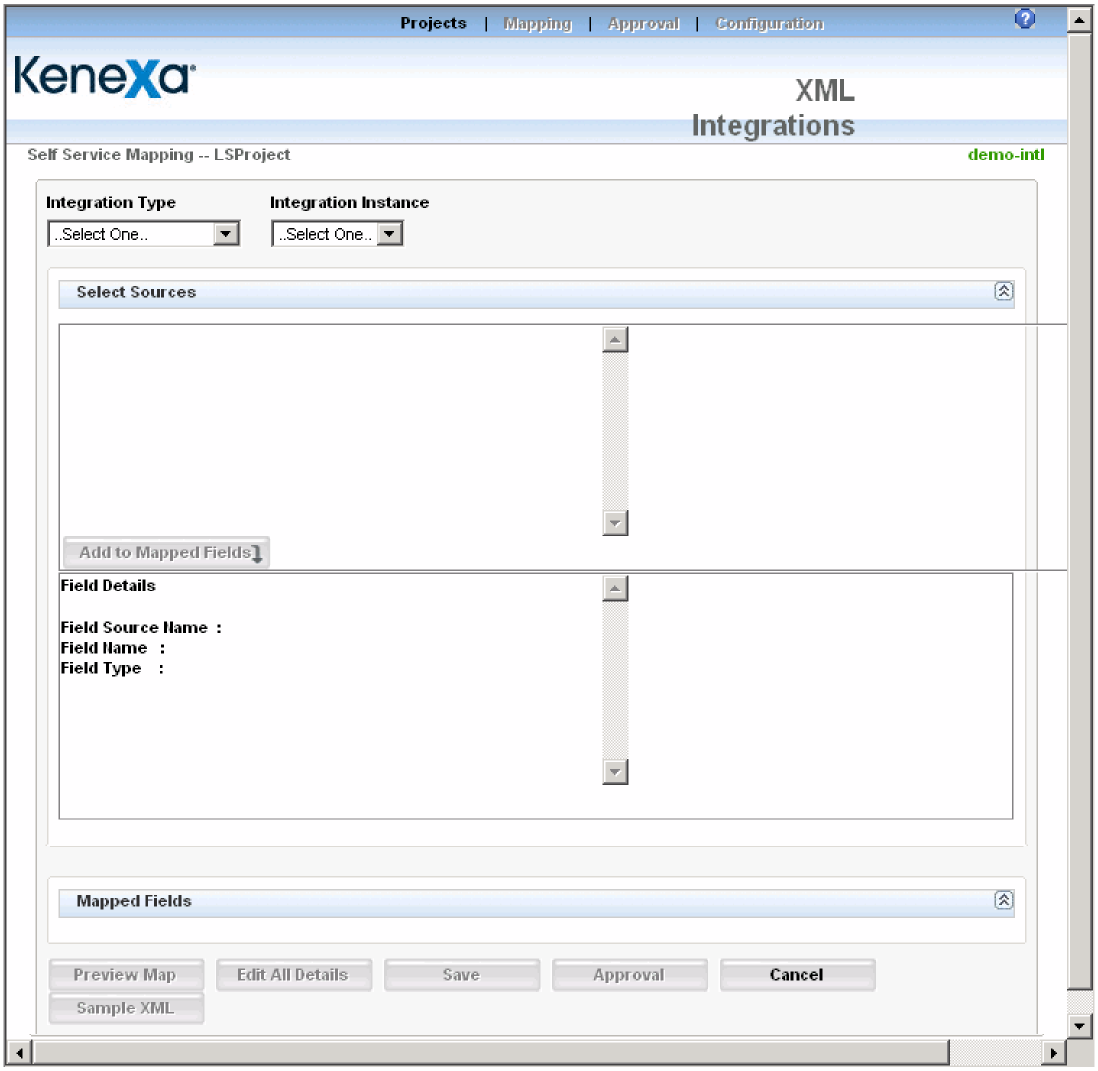
Note: You can edit only draft versions of an existing project. (To view a version of a partially configured project, click the **Click here for Details** link for that project in the **Version History** area of the page.)



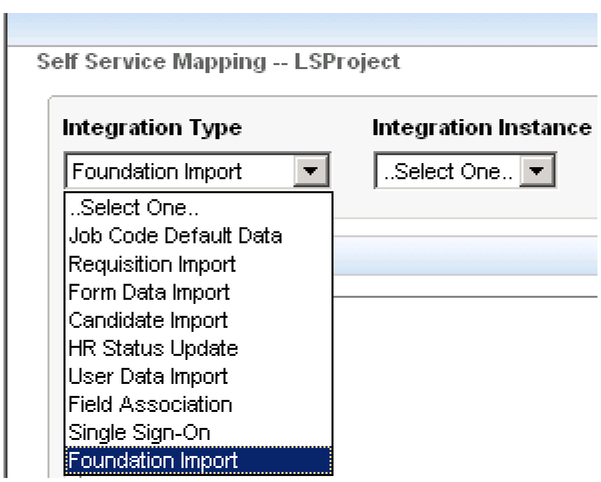
5. Once the draft version of the project is created, you can select it in the **Mapping Draft Details** section of the page and click **Map Draft**.



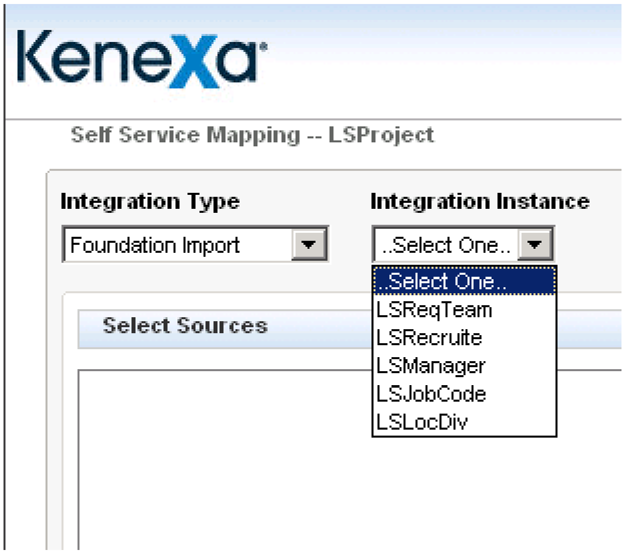
The **Self-Service Mapping** page for this project appears. No selections have been made.



6. Select **Foundation Import** for **Integration Type**.

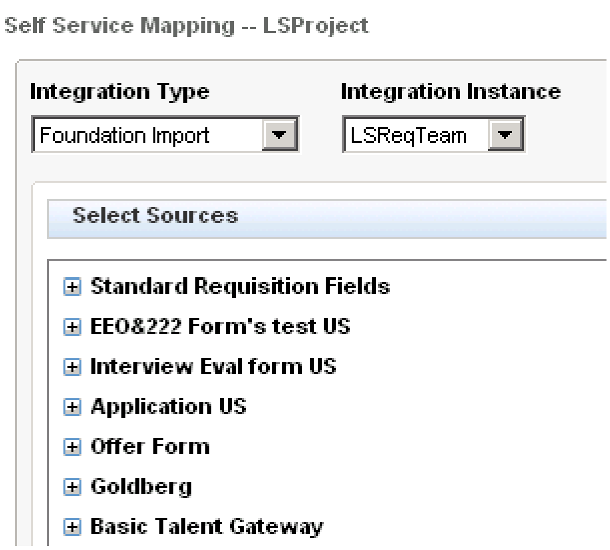


7. Select the **Integration Instance** for this **Integration Type**. The list displays all the instances that belong to the selected integration type.

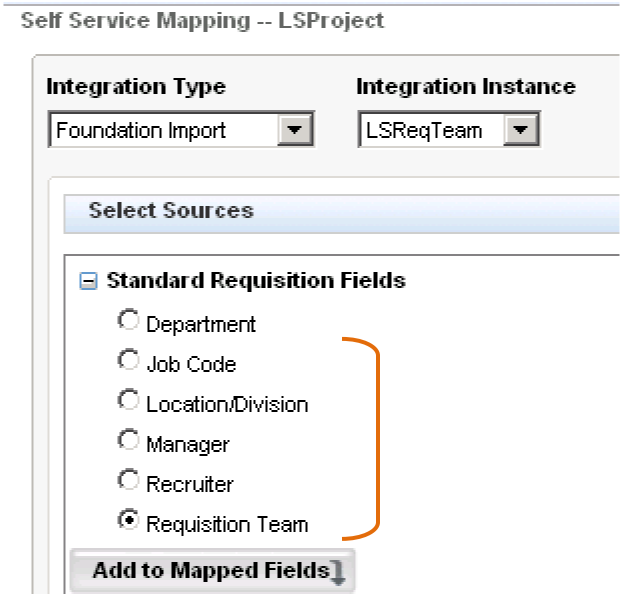


8. In this example, we are going to map the **Requisition Team** field, so we select **LSReqTeam**.

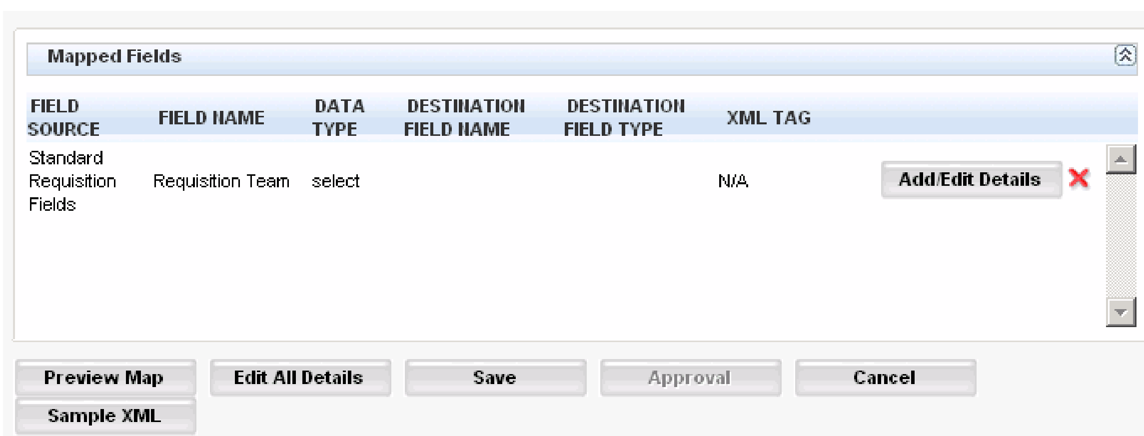
9. The **Select Sources** content area displays an expandable list of categories of data that are available for mapping for the selected integration type. This list represents all possible sources from within 2x BrassRing for this integration type.



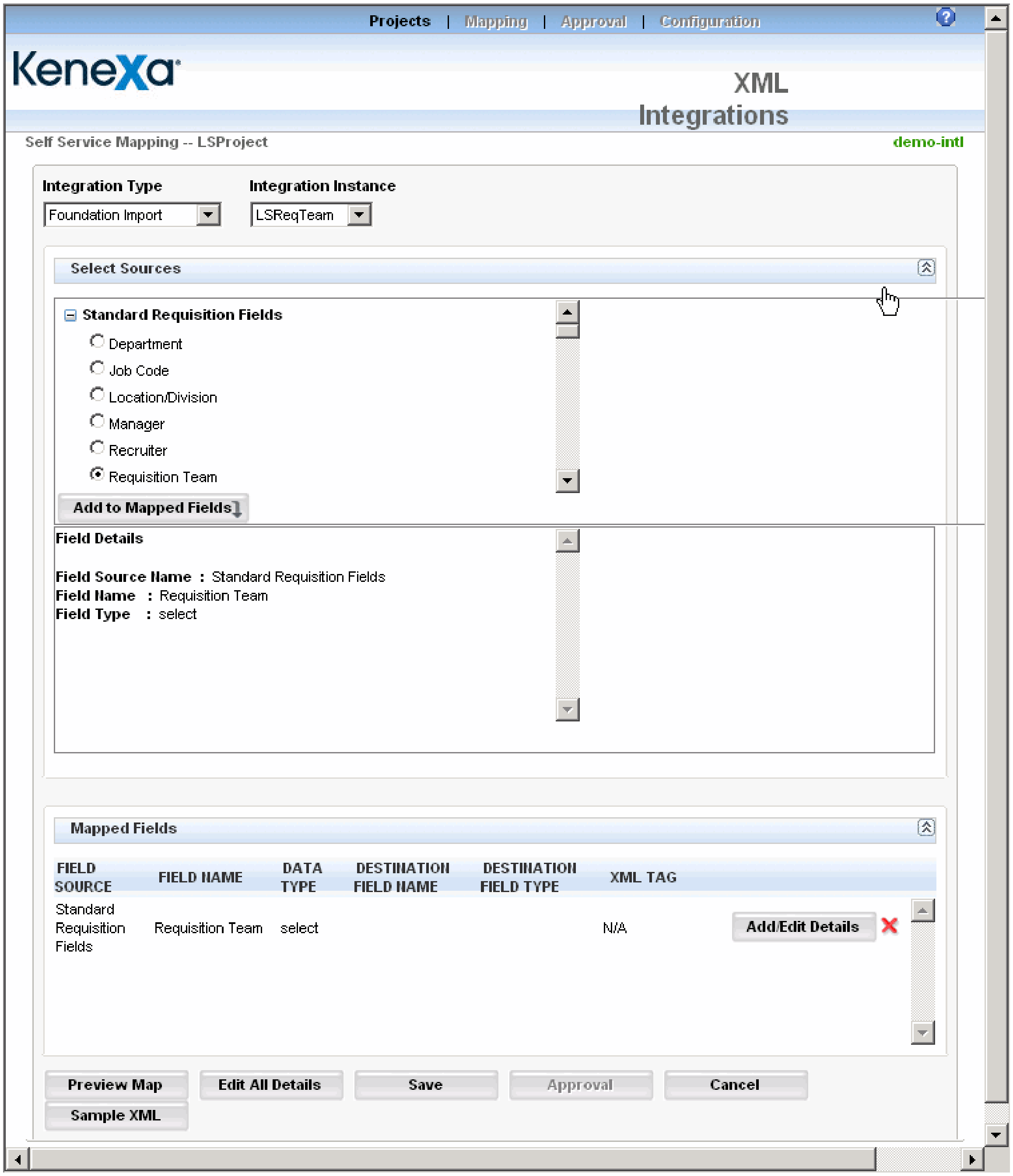
10. Click the plus sign ⊞ to expand the list under a source category, as shown below.



11. Select the field for this instance (for example, in this case you would select **Requisition Team**) and click **Add to Mapped Fields**. (Note: Your mapping worksheets should include this information.) Your selections are added to the **Mapped Fields** area at the bottom of the page.
12. The field you selected is added to the **Mapped Fields** section.

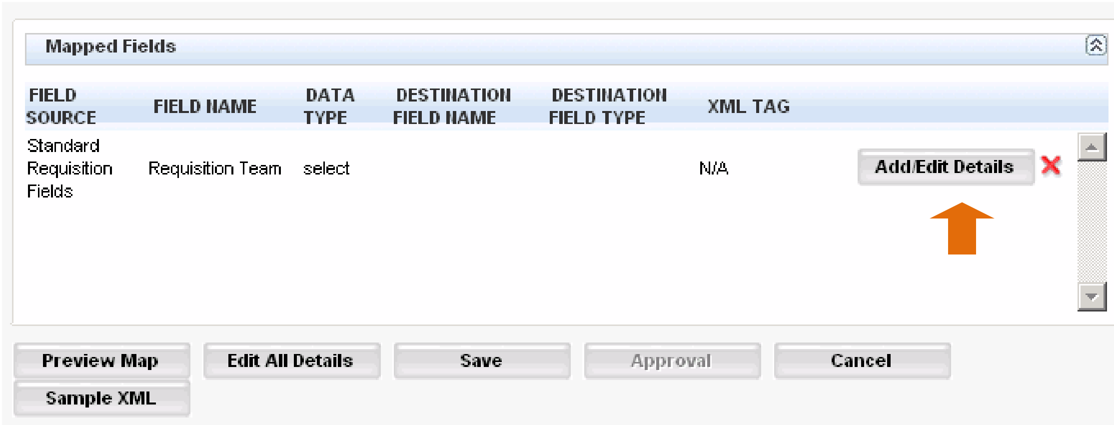


This is how the **Self-Service Mapping** page looks for this mapped field so far:

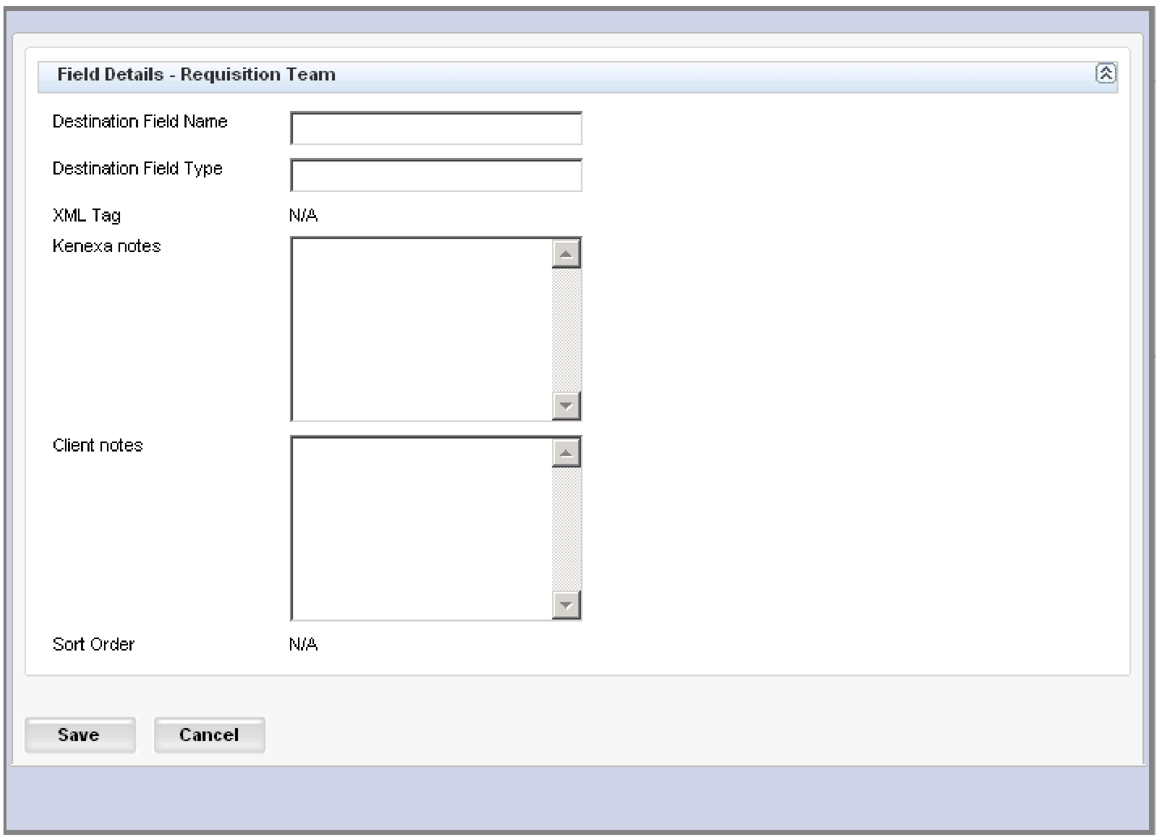


To continue mapping you must add or edit the field details information for the field you are mapping (in this case, “Requisition Team”):

1. Click **Add/Edit Details** to add or edit details for the mapped field.



2. The **Field Details** page for that field source opens. The screen capture below displays a typical **Field Details** page.



3. Enter text for the fields on this page using information from your organization's mapping worksheets.

   Destination Field Name – Enter the destination field name that corresponds to the field name in the your organization's information system. This field accepts up to 50 alphanumeric characters.

Destination Field Type – Enter the data type for the destination field above. This field supports the following field types: Sources include field types: multi-select, single-select, query-select, and select type of questions.

XML Tag – N/A

Kenexa notes – These are standard notes that are applicable to this field. You can edit this field. The field supports up to 4000 characters.

Client notes – Kenexa or Client users can enter client-specific notes in this field of up to 4000 characters if desired. The field stores previously entered notes if they exist.

Sort Order – N/A. Applies only to the Candidate Export integration type.

4. Click **Save** when you are finished. Note: You must add at least one item to **Mapped Fields** before the **Save** button becomes active.

   You can click **Cancel** to exit without saving anything and go back to the **Project Details** page.

5. If necessary, repeat this procedure as described in your mapping worksheets for other instances of this integration type (Foundation Data Import).

Foundation Data Import Sample XML

This example xml is for the Requisition Team field.


```
<?xml version="1.0" encoding="UTF-8" ?>
- <Envelope version="01.00">
- <Sender>
  <Id>1234</Id>
  <Credential>516</Credential>
  </Sender>
- <Recipient>
  <Id />
  </Recipient>
- <TransactInfo transactType="data">
  <TransactId>15747</TransactId>
  <TimeStamp>2010-03-16 15:21 PM</TimeStamp>
  </TransactInfo>
- <Packet>
- <PacketInfo packetType="data">
  <PacketId>1</PacketId>
  <Action>SET</Action>
  <Manifest>LSReqTeam</Manifest>
  </PacketInfo>
- <Payload>
- <![CDATA[
<?xml version="1.0"?>
<Foundation_Data>
```

```
        <Foundation_Item>
                <Code>107</Code>
                <Description>Shared Purchasing, Inc.</Description>
                <Status>A</Status>
        </Foundation_Item>
        <Foundation_Item>
                <Code>111</Code>
                <Description>Cool Beans, Inc.</Description>
                <Status>A</Status>
        </Foundation_Item>
</Foundation_Data>
  ]]>
  </Payload>
  </Packet>
  </Envelope>
```

Additional Notes

- For each foundation data item, the tags `<Code>`, `<Description>`, and `<Status>` are required.
- The `<Code>` tag sets the foundation option code and serves as a record key to identify whether this import instance is an update to an existing record or an insert of a new record.
- The `<Description>` tag sets the description of an option that will be displayed to the end user on the screen.
- The `<Status>` tag flags each item as being active or inactive. The acceptable values for Status codes are "A" (Active) or "I" (Inactive) only. The "I" Status is used to "Delete" the record from the user interface. For historical and reporting purposes, records are marked as inactive and are not removed from 2x BrassRing.

Job Code Default Data

Follow the instructions starting on page 7 for creating a draft and mapping an instance of an integration type. See the *Integration Type Details Summary* table on page 56 for more information about this integration type.

JCDD Import Sample XML


```
  <?xml version="1.0" encoding="UTF-8" ?>
- <Envelope version="01.00">
- <Sender>
  <Id>1234</Id>
  <Credential>516</Credential>
  </Sender>
- <Recipient>
  <Id />
  </Recipient>
- <TransactInfo transactType="data">
  <TransactId>15747</TransactId>
  <TimeStamp>2010-03-16 16:32 PM</TimeStamp>
  </TransactInfo>
- <Packet>
- <PacketInfo packetType="data">
  <PacketId>1</PacketId>
  <Action>SET</Action>
  <Manifest>LSProjJCDD</Manifest>
  </PacketInfo>
- <Payload>
- <![CDATA[
<?xml version="1.0"?>
<LSProjJCDD>
        <JOBCODE>01122</JOBCODE>
        <JOBCODEDESC>ANALYST-CNTRCT MGT-II-NONC-SLR</JOBCODEDESC>
        <JOBDESCRIPTION></JOBDESCRIPTION>
</LSProjJCDD>
  ]]>
  </Payload>
  </Packet>
  </Envelope>
```


Additional Notes

- You can edit the XML tag for the selected field to give it a custom tag name. If you do not change the value for the XML tag, the system, by default, uses the database field name, makes it UPPERCASE, and concatenates multiple words into one word (if database field name contains multiple words); for example, DATABASEFIELDNAME. The XML tag cannot include special characters, such as the hypen (-) or comma (,).
- Position data (Job Code) must be uploaded one at a time (one packet per envelope). This is unlike other types of Foundation data.

- JobCode is used as a record key identifier.
- JobCodeDesc and Job_Title are stored in two distinct places on the 2x BrassRing requisition form. The values for these fields are usually the same but can be different based on your organization's specific configuration.
- Job Code Status (JOBCODESTATUS) must be either "A" (active) or "I" (inactive).
- <JOBCODE>, <JOBCODEDESC>, and <JOBCODESTATUS> tags are the only required tags for Position Data upload. All additional tags are optional and map to client's specific requisition form fields.
- You can include the JOBOO node with Position Data. See “


```xml
<?xml version="1.0" encoding="UTF-8" ?>
- <Envelope version="01.00">
- <Sender>
  <Id>1234</Id>
  <Credential>516</Credential>
  </Sender>
- <Recipient>
  <Id />
  </Recipient>
- <TransactInfo transactType="data">
  <TransactId>15747</TransactId>
  <TimeStamp>2010-03-16 17:23 PM</TimeStamp>
  </TransactInfo>
- <Packet>
- <PacketInfo packetType="data">
  <PacketId>1</PacketId>
  <Action>SET</Action>
  <Manifest>LSRqImpt</Manifest>
  </PacketInfo>
- <Payload>
- <![CDATA[
<?xml version="1.0"?>
<LSRqImpt>
        <REQUISITIONNUMBER>OptionalReqId</REQUISITIONNUMBER>
        <JOB_REQ_STATUS>1</JOB_REQ_STATUS>
        <DEPARTMENT></DEPARTMENT>
        <JOBDESCRIPTION></JOBDESCRIPTION>
        <MANAGER></MANAGER>
        <NOOFPOSITIONS></NOOFPOSITIONS>
        <RECRUITER></RECRUITER>
        <TITLE></TITLE>
        <POSITIONSREMAINING></POSITIONSREMAINING>
</LSRqImpt>
  ]]>
  </Payload>
  </Packet>
  </Envelope>
```


- Additional Notes” for Requisition Import on page 74 for more information.

Requisition Import

Follow the instructions starting on page 7 for creating a draft and mapping an instance of an integration type. See the *Integration Type Details Summary* table on page 56 for more information about this integration type.

Requisition Import Sample XML


```
  <?xml version="1.0" encoding="UTF-8" ?>
- <Envelope version="01.00">
- <Sender>
  <Id>1234</Id>
  <Credential>516</Credential>
  </Sender>
- <Recipient>
  <Id />
  </Recipient>
- <TransactInfo transactType="data">
  <TransactId>15747</TransactId>
  <TimeStamp>2010-03-16 17:23 PM</TimeStamp>
  </TransactInfo>
- <Packet>
- <PacketInfo packetType="data">
  <PacketId>1</PacketId>
  <Action>SET</Action>
  <Manifest>LSRqImpt</Manifest>
  </PacketInfo>
- <Payload>
- <![CDATA[
<?xml version="1.0"?>
<LSRqImpt>
        <REQUISITIONNUMBER>OptionalReqId</REQUISITIONNUMBER>
       <JOB_REQ_STATUS>1</JOB_REQ_STATUS>
       <DEPARTMENT></DEPARTMENT>
       <JOBDESCRIPTION></JOBDESCRIPTION>
       <MANAGER></MANAGER>
       <NOOFPOSITIONS></NOOFPOSITIONS>
       <RECRUITER></RECRUITER>
       <TITLE></TITLE>
       <POSITIONSREMAINING></POSITIONSREMAINING>
</LSRqImpt>
  ]]>
  </Payload>
  </Packet>
  </Envelope>
```


Additional Notes

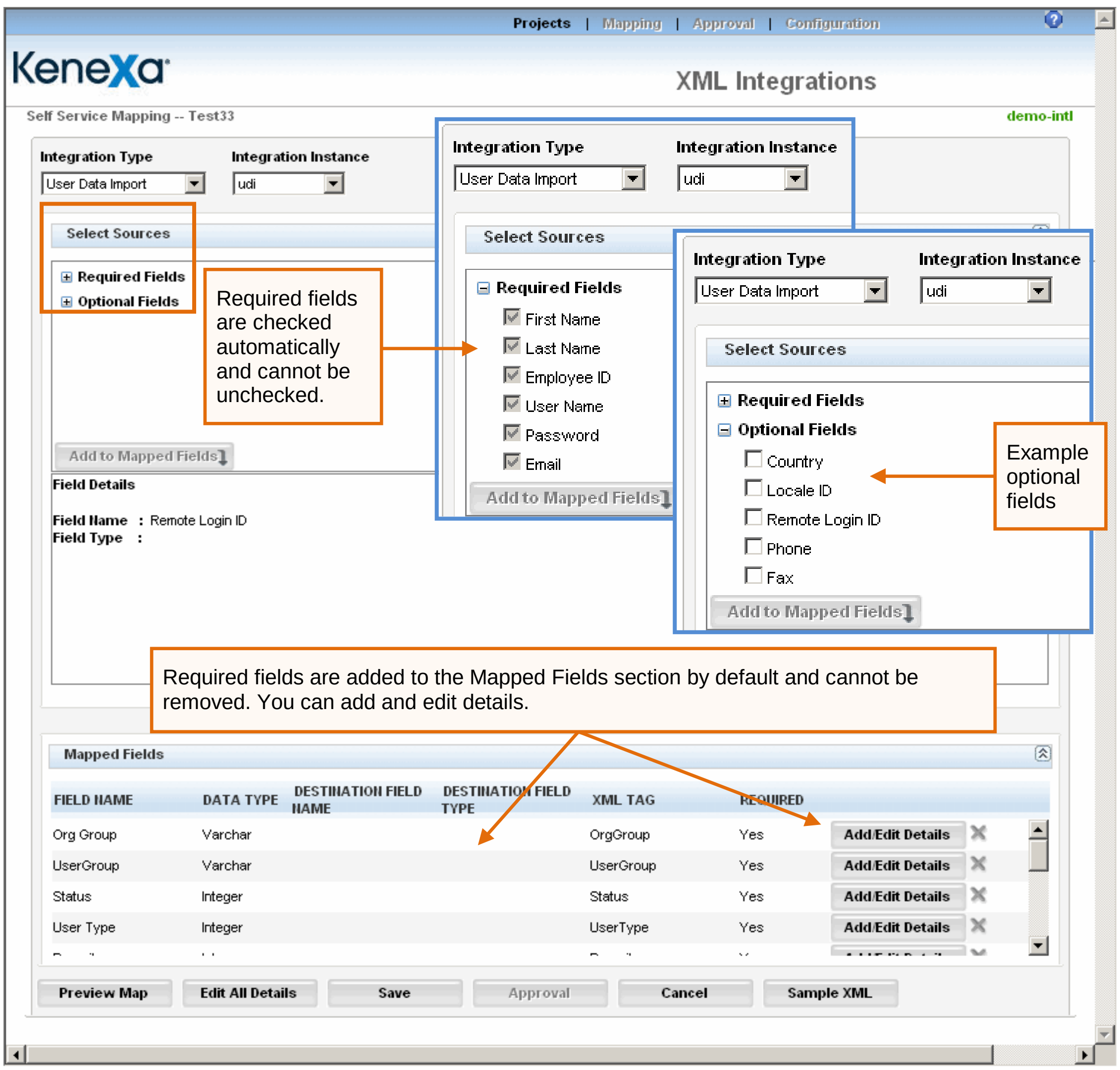
- You can edit the XML tag for the selected field to give it a custom tag name. If you do not change the value for the XML tag, the system, by default, uses the database field name, makes it UPPERCASE, and concatenates multiple words into one word (if database field name contains multiple words); for example, DATABASEFIELDNAME. The XML tag cannot include special characters, such as the hypen (-) or comma (,).

- Requisitions must be uploaded one at a time; each XML envelope can contain only one (1) requisition per payload.
- The “formtypeid” and “name” attributes are required only if the client has more than one Requisition form defined.
- There following requisition tags are required: REQUISITIONNUMBER, JOB_REQ_STATUS, MANAGER, RECRUITER, JOBTITLE, and JOBDESCRIPTION. All other tags are not required and can be defined by the customer.
- The JOBOO node is optional and controls auto-posting of requisitions to Talent Gateway(s). Each Talent Gateway must have a separate SITE node.
- Each site node has six (6) attributes: ID, NAME, DAYSTILLPOSTING, POSTINGDAYS, QUESTIONIDS, and STATUS.
    - Site ID and NAME – Identifiers for the Talent Gateway to which the requisition should be posted.
    - DAYSTILLPOSTING – Specifies the number of days that should elapse before the position will be posted on the Talent Gateway.
    - POSTINGDAYS – Specifies the number of days the requisition should remain posted on the Talent Gateway.
    - QUESTIONIDS – Identifiers for specific Talent Gateway questions that should be included with a specific requisition posting on the Talent Gateway site. If no value is passed for this attribute, the default question(s) associated with the Talent Gateway site are automatically selected.
    - STATUS – Specifies whether the requisition should be posted (“A” for active) to Talent Gateway site or removed (“I” for inactive) from it.

Example Mapping: User Data Import

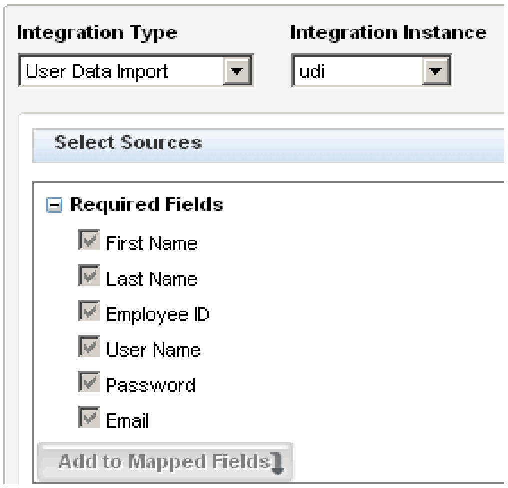
These instructions assume you have already created a draft project and clicked **Map Draft** to display the **Mapping** page. This section describes how to complete the mapping page for a user data import. On the **Mapping** page for the selected draft project:

1. Select **User Data Import** for **Integration Type**.
2. Select the **Integration Instance** for the selected **Integration Type**. The list displays all the instances that belong to the selected integration type.
3. The **Select Sources** content area displays an expandable list of categories of data that are available for mapping for the selected integration type. This list represents all possible sources from within 2x BrassRing for this integration type.
4. Click the plus sign ⊞ to expand the list under a source category, as shown below.

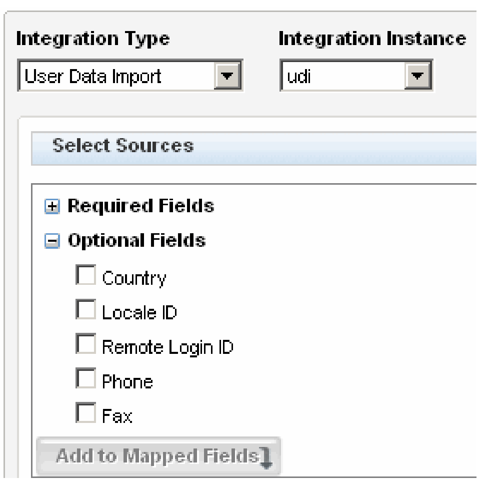


The sources for this integration type are listed in two categories: **Required Fields** and **Optional Fields**. Expand the list of sources under each category:

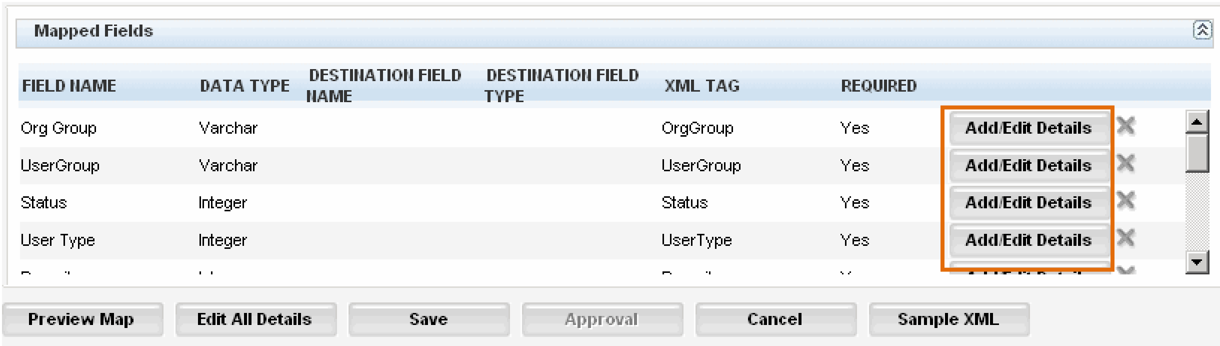
Required fields are pre-selected and grayed out. You cannot un-select them. They are already added. to the **Mapped Fields** section further down on the page.



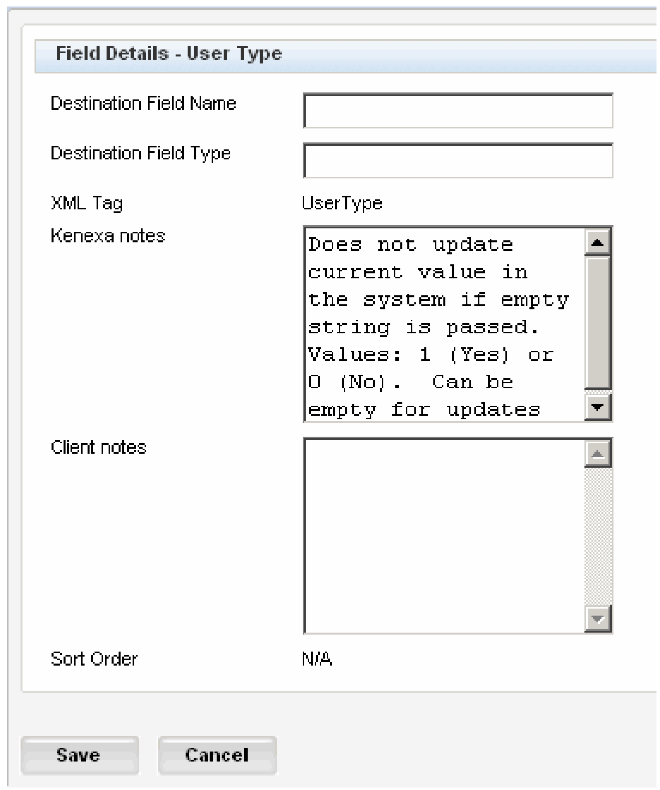
Optional fields are active and available for selection but are not selected by default.



5. If desired for this user data import, select one or more optional fields and click **Add to Mapped Fields**. (Note: Your mapping worksheets should include this information.) Your selections are added to the **Mapped Fields** area at the bottom of the page.



6. Click **Add/Edit Details** to add or edit details for each mapped field, both required and optional.
7. The **Field Details** page for that field source opens. The screen capture below displays a typical **Field Details** page. See “User Data Import Fields” on page 82 for more information about each field source included in the User Data Import.
8. Enter text for the fields on this page using information from your organization’s mapping worksheets.



Destination Field Name – Enter the destination field name that corresponds to the field name in the your organization’s information system. This field accepts up to 50 alphanumeric characters.

Destination Field Type – Enter the data type for the destination field above.

XML Tag – For required User Data Import fields, this tag is supplied by 2x BrassRing and cannot be edited.

Kenexa notes – These are standard notes that are applicable to this field. You can edit this field. The field supports up to 4000 characters. (Field Association notes are not editable but all other notes are editable.)

Client notes – Kenexa or Client users can enter client-specific notes in this field of up to 4000 characters if desired. The field stores previously entered notes if they exist.

Sort Order – N/A. Applies only to the Candidate Export integration type.

9. Click **Save** when you are finished. Note: You must add at least one item to **Mapped Fields** before the **Save** button becomes active.

   You can click **Cancel** to exit without saving anything and go back to the **Project Details** page.

10. If necessary, repeat this procedure as described in your mapping worksheets for other integration types.

User Data Import

Follow the instructions starting on page 7 or page 62 for creating a draft and mapping an instance of an integration type.
See the *Integration Type Details Summary* table on page 56 for more information about this integration type.
See the list of user data import fields starting on page 82.

User Data Import Sample XML


```
<?xml version="1.0"?>
<Envelope version="01.00">
      <Sender>
            <Id>EMPLID</Id>
            <Credential>CLIENTID</Credential>
      </Sender>
      <Recipient>
            <Id/>
      </Recipient>
      <TransactInfo transactType="data">
            <TransactId>TRANSACTIONID</TransactId>
            <TimeStamp>2003-10-27T10:08:11PST</TimeStamp>
      </TransactInfo>
      <Packet>
            <PacketInfo packetType="data">
                  <PacketId>1</PacketId>
                  <Action>SET</Action>
                  <Manifest>USER</Manifest>
            </PacketInfo>
            <Payload><![CDATA[<?xml version="1.0"?>
<Users>
      <User>
            <FirstName>XML</FirstName>
            <LastName>TEST</LastName>
            <EmployeeID>DUID</EmployeeID>
            <UserName>NETID</UserName>
            <Password>password</Password>
            <Email>johndoe@brassring.com</Email>
            <Manager>1</Manager>
            <Recruiter>1</Recruiter>
            <Country>USA</Country>
            <Localeid>1033</Localeid>
            <RemoteLoginID></RemoteLoginID>
            <Phone>781-555-5555</Phone>
            <Fax>781-530-5050</Fax>
            <Title>Quality Assurance Manager</Title>
            <Dept>Department 1</Dept>
            <UserType>Hiring Manager</UserType>
```



```
            <UserGroup>Standard Group</UserGroup>
            <OrgGroup>Orgroup1</OrgGroup>
            <ApprovalGroups>
                  <Group>HR_VP</Group>
                  <Group>VP/GM/Dept_Head</Group>
                  <Group>COO</Group>
            </ApprovalGroups>
            <Expressuser>0</Expressuser>
            <Status>A</Status>
      </User>
</Users>]]></Payload>
      </Packet>
</Envelope>
```

Additional Notes

When the **XML Tag** is required by 2x BrassRing, the XML coming into 2x BR must include a tag.

When a **Value** is required by 2x BrassRing, the XML coming into 2x BR with the tag must contain a value.

When the **XML Tag** and **Value** are required by 2x BrassRing, the XML coming into 2x BR must include a tag and a value.

When the **XML Tag** is required by 2x BrassRing but the **Value** is optional, the XML coming into 2x BR must include the tag but the value within the tag is optional.

When **Value** = **Only on Insert**, the XML coming into 2x BR must include a value along with the tag when the user is created for the first time. The value is not required for updates to the user's record.

User Data Import Fields

Name	Tag	Value	Type	Notes
FirstName	Required	Required	Text (30)	
LastName	Required	Required	Text (30)	
EmployeeID	Required		Text (15)	For each user, EmployeeID is the key value for the system to identify whether this is an update to an existing user, or an insert of a new user. If nothing is passed for EmployeeID, existing settings are not updated. If a value is passed for EmployeeID, it must be unique.
UserName	Required	Required	Text (30)	Must be unique. Cannot be updated.
Password	Required	Only on insert	Text (25)	Required only for the insert of a new user. If the user already exists in the system, the password is ignored even if it is included in the User Data Import. Passwords for existing users cannot be updated through integrations.
Email	Required	Required	Text (70)	
Expressuser	Required	Only on insert	Char (1)	Does not update current value in the system if empty string is passed. Values: 1 (Yes) or 0 (No). Can be empty for updates.
Manager	Required	Only on insert	Char (1)	Does not update current value in the system if empty string is passed. Values: 1 (Yes) or 0 (No). Can be empty for updates.
Recruiter	Required	Only on insert	Char (1)	Does not update current value in the system if empty string is passed. Values: 1 (Yes) or 0 (No). Can be empty for updates.
UserType	Required	Only on insert	Single-Select	Does not update current value in the system if empty string is passed. Can be empty for updates.
UserGroup		Only on insert	Single-Select	Does not update current value in the system if empty string is passed. Can be empty for updates.
OrgGroup			Multi-Select	OrgGroup is required upon insert only if Client has defined any Org Groups within 2x BrassRing. Does not update current value in the system if empty string is passed
Country			Single-Select	Defaults to United States.
Localeid			Single-Select	If no value sent, defaults to client setting's localeid.
RemoteLoginID				
Phone			Text (40)	

Name	Tag	Value	Type	Notes
Fax			Text (40)	
Title			Text (50)	
Dept			Text (25)	
Status	Required	Required	Char (1)	Values: either “A” (Active) or “I” (Inactive). Users cannot be deleted from the 2x BrassRing system for historical and reporting purposes.
SUPERVISORID				Used in conjunction with the Smart Approval module. Contains the EmployeeID of the user’s manager.
ROLE				Used in conjunction with the Smart Approval module.

ApprovalsGroups			Multi-Select	Used in conjunction with the Approval Groups feature:
				`<ApprovalGroups>`
				`    <Group>HR_VP</Group>`
				`    <Group>VP/GM/Dept_Head</Group>`
				`    <Group>COO</Group>`
				`</ApprovalGroups>`
				Warning: If you specify empty tags for Group, it will override the existing values in 2x BR.

SignatureImage				
UserSignature				
Language			Single-Select	If no value sent, defaults to client setting’s language

CodeAccessGroups			Multi-select	`<CodeAccessGroups>`
				`    <Group>Code Group</Group>`
				`    <Group>Another Code Group</Group>`
				`</CodeAccessGroups>`

Form Data Import

Follow the instructions starting on page 7 for creating a draft and mapping an instance of an integration type. See the *Integration Type Details Summary* table on page 56 for more information about this integration type. See page 85 for information about XML tags for forms.

Form Data Import Sample XML

```
<?xml version="1.0"?>
<Envelope version="01.00">
      <Sender>
            <Id>EMPLID</Id>
                        <!-- Integration user EmplID – provided by Kenexa –
do not change-->
                  <Credential>CLIENTID</Credential>
                        <!–Customer clientid – provided by Kenexa – do not
change-->
      </Sender>
      <Recipient>
            <Id/>
      </Recipient>
            <TransactInfo transactType="data">
                        <!-- always data - do not change -->
            <TransactId>15747</TransactId>
                        <!-- client generated alphanumeric value for
troubleshooting and tracking -->
            <TimeStamp>2010-02-28 09:22:10AM</TimeStamp>
                        <!--date-time value for troubleshooting and tracking
-->
      </TransactInfo>
<Packet>
            <PacketInfo packetType="data">
                  <PacketId>2</PacketId>
                  <Action>SET</Action>
                  <Manifest> PREINTERVIEWRESULTSFORM</Manifest>
            </PacketInfo>
            <Payload><![CDATA[<?xml version="1.0"?>
        <form formTypeId="51" formName="" formId="" action="Insert"
resumeKey="233682" FirstName="" LastName="" email="" homePhone=""
language="EN" autoreq="127BR">
        <FormInput name="1213" title="Skills Result">Fail</FormInput>
        <FormInput name="1214" title="Psych Result">Fail</FormInput>
        <FormInput name="1215" title="SK Result">Fail</FormInput>
      </form>
      ]]></Payload>
      </Packet>
</Envelope>
End of Sample (This is not part of the xml file.)
```


Additional Notes

- You can upload multiple forms in one transaction. The file size limit for Form Imports is 64KB per transaction.
- Each transaction can contain multiple packets.
- Each form must be in its own packet with only one form per packet.

The system:

1. Sends the transaction.
2. Waitss for the success or failure response.
3. Sends the next transaction.

The Form Tag

The Form tag contains ten (10) attributes described in the table below.

Attribute	Description
formTypeID	The formTypeID is a unique identifier for the form type, and provided by Kenexa.
FormName	The FormName is the name of the form within 2x BrassRing.
formId	The formID is the internal form identifier for a candidate form. Your organization can pass the formid for a specific form in the feed to update that form for a specific candidate. If the candidate has a multiple per candidate form, you can specify which form instance should be updated.

action	The action specifies whether a new form should be inserted or an existing form should be updated.
	
	Form Updates
	There are three (3) parameters that can be sent for processing the “action” attribute:
	▪ Insert – will insert a new form with the information provided
	▪ Update – cleans the existing form and updates with new information that is provided.
	
	For example, Candidate A’s EEO form information is sent using the “Update” parameter.
	`<SEX>Male</SEX>`
	`<ETHNICITY>Decline</ETHNICITY>`

```
<RACE>I am declining to provide this information</RACE>

<HISPANIC OR LATINO>No</HISPANIC OR LATINO>
```

Sending this information erases all Candidate A’s existing EEO form information and updates it with the above information.

- Update Individual – Updates only the fields that are sent and will keep the remaining fields untouched.

  For example, assume that the same Candidate A’s EEO form information is sent using the “UpdateIndividual” parameter” for the following fields:

```
<ETHNICITY>Native Hawaiian or Other Pacific Islander</ETHNICITY>

<RACE>Caucasian</RACE>
```

  When the import takes place, only the **Ethnicity** and **Race** fields are updated; the existing **Sex** and **Hispanic or Latino** responses are unchanged.

  If you send empty elements, those elements are updated to blank. For example, if the XML code below is sent, the import updates the element **Hispanic or Latino** to blank.

```
<ETHNICITY>Native Hawaiian or Other Pacific Islander</ETHNICITY>

<RACE>Caucasian</RACE>

<HISPANIC OR LATINO></HISPANIC OR LATINO>
```

Empty element

  FormInput contains the field id and the field name as defined on the specific candidate form. These values are provided in each template and should not be changed.

resumeKey	The resumeKey is the candidate identification number that is sent to the candidate upon completion of the job application process. When the resumeKey is passed in the xml, the name, phone number, and email address can be passed as empty nodes.
First Name	The First Name is used to identify candidates and is a required attribute. This value can be empty if resumeKey is supplied.
Last Name	Last Name is used to identify candidates and is a required attribute. This value can be empty if resumeKey is supplied.
email or home Phone	If resumeKey is not supplied, then a value for either email or home Phone is also required in order to identify the right candidate in the system.

	If no candidates or multiple candidates are found with the same First Name, Last Name, and email/homePhone information, the form will be rejected. Note: If both email and homePhone information are sent for a candidate, 2x BrassRing looks for an exact match for both email and home Phone. This value can be empty if resumeKey is supplied
language	The language node defines the language of the form responses.
autoreq	Autoreq is required when you insert or update a “per req” form.

HR Status Update

Follow the instructions starting on page 7 for creating a draft and mapping an instance of an integration type.
See the *Integration Type Details Summary* table on page 56 for more information about this integration type.

Include HR Status Update checkbox – You must check this checkbox and click **Save**. The HR Status Update is added in its entirety to the Mapped fields section. The “Select Sources” section is not displayed for HR Status Update. You cannot edit the details for HR Status Update.

To de-select this option, uncheck the check box and click **Save**.

Candidate Import

Follow the instructions starting on page 7 for creating a draft and mapping an instance of an integration type.
See the *Integration Type Details Summary* table on page 56 for more information about this integration type.
Important: If you want to include Form Import (page **Error! Bookmark not defined.**) and/or HR Status Update (page **Error! Bookmark not defined.**) with your **Candidate Import** for this project, you may find it easier to map those integration types before mapping **Candidate Import**.

Candidate Import Options

Candidate Import has two options for selection that require preparation: **Include Form Import** and **Include HR Status Update**.

- Include Form Import – Select this option to include the **Form Data Import** configured for this project.
  - All form instances that are part of the current project that have been added to the **Mapped Fields** area on the **Form Data Import** page are displayed. Unmapped form instances are not included in the list.
  - You can select single or multiple instances of Form Data Import.
  - The form details you select here are added to the mapped fields section of the Candidate Import page below the selected forms.
  - This selection is only for the current instance of Candidate Import.
  - If you uncheck this option, the association to the selected Form Data Import instance is removed.

- Include HR Status Update – Select this option to include the **HR Status Update** configured for this project.
  - All HR Status Update instances that are part of the current project that have been added to the Mapped Fields area on the HR Status Update page are displayed. Unmapped HR Status Update instances are not displayed.
  - You can select single or multiple instances of HR Status Update.
  - The HR status details you select here are added to the mapped fields section of the Candidate Import page below the selected forms.
  - This selection is only for the current instance of Candidate Import.
  - If you uncheck this option, the association to the selected **HR Status Update** instance is removed.

Candidate Import Sample XML

This xml file does not include HR Status Update or Form Data Import.

```
  <?xml version="1.0" encoding="UTF-8" ?>
- <BRpartner:Envelope version="01.00" xmlns:BRpartner="http://trm.brassring.com/brpartner">
- <Sender>
  <Id>inactive</Id>
  <Credential>516</Credential>
  </Sender>
- <Recipient>
  <id type="httppost">http://domainname/receivingasyncmessagepage.asp</id>
- <!--  Reply email or URL where async responses are sent. Can have one or more email addresses
or one URL
  -->
  </Recipient>
- <TransactInfo transactType="data">
  <transactId>1234567</transactId>
  <timeStamp>2010-03-19 13:11 PM</timeStamp>
  </TransactInfo>
- <Packet>
- <PacketInfo packetType="data">
  <packetId>1</packetId>
  <Action>INSERT</Action>
  <Manifest>LSPCandImp_CANDIDATE_UPLOAD</Manifest>
  </PacketInfo>
- <Payload>
- <![CDATA[
<?xml version="1.0" encoding="UTF-8"?>
<Candidate xmlns:RHrxml="http://ns.hr-xml.org/2004-08-02"
xmlns:BRpartner="http://trm.brassring.com/brpartner">
        <CandidateRecordInfo>
                <Id idOwner="CandidateId">
                        <IdValue/>
                        <!-- Optional. Leaving this value empty is Ok  -->
                        <!-- Resumekey/Reference number cannot be specified for an action "INSERT"
leave it blank.-->
                </Id>
                <Status>Active</Status>
                <!-- Required - Indicates Candidate Status in the system. A for Active, I for
Inactive -->
        </CandidateRecordInfo>
        <CandidateSupplier relationship="x:vendor">
                <SupplierId>
                        <IdValue>IDVALUE</IdValue>
                        <!-- Required - This is provided by Kenexa. Do not change this information
-->
                </SupplierId>
                <EntityName/>
                <!-- Optional. Leaving this value empty is Ok  -->
        </CandidateSupplier>
        <CandidateProfile xml:lang="EN">
                <PersonalData>
                        <PersonName>
                                <GivenName>Andy</GivenName>
                                <!-- Required. This is the First Name of the candidate  -->
                                <MiddleName/>
                                <!-- Optional. This is the Middle Name of the candidate. Leaving
this value empty is Ok  -->
                                <FamilyName>Roddick</FamilyName>
                                <!-- Required. This is the Last Name of the candidate  -->
                        </PersonName>
                        <ContactMethod>
```

```
                              <Location>home</Location>
                              <!-- Required - Do not change this information  -->
                              <Telephone>
                                     <FormattedNumber>(777) 727-7777</FormattedNumber>
                                     <!--  Required. This is the Home Phone -->
                              </Telephone>
                              <Fax>
                                     <FormattedNumber/>
                                     <!-- Optional. This is the Fax number of the candidate.
Leaving this value empty is Ok  -->
                              </Fax>
                              <InternetEmailAddress>arod@hotmail.com</InternetEmailAddress>
                              <InternetWebAddress> myinternetpage</InternetWebAddress>
                              <!--  Required. This is the Email Address -->
                              <PostalAddress>
                                     <CountryCode>US</CountryCode>
                                     <!-- Optional. Leaving this value empty is Ok  -->
                                     <PostalCode>90210</PostalCode>
                                     <!-- Optional. Leaving this value empty is Ok  -->
                                     <Region>CA</Region>
                                     <!-- Optional.  Leaving this value empty is Ok  -->
                                     <Municipality>Hollywood</Municipality>
                                     <!-- Optional. Leaving this value empty is Ok  -->
                                     <DeliveryAddress>
                                            <AddressLine>123 Hollywood Ave</AddressLine>
                                            <!-- Optional. Leaving this value empty is Ok  -->
                                            <AddressLine/>
                                            <!-- Optional. Leaving this value empty is Ok  -->
                                     </DeliveryAddress>
                              </PostalAddress>
                       </ContactMethod>
                       <ContactMethod>
                              <Location>office</Location>
                              <!-- Optional. Leaving this value empty is Ok  -->
                              <Telephone>
                                     <FormattedNumber>(888) 888-8888</FormattedNumber>
                                     <!-- Optional. Leaving this value empty is Ok  -->
                              </Telephone>
                       </ContactMethod>
                       <ContactMethod>
                              <Location>office</Location>
                              <!-- Optional. Leaving this value empty is Ok  -->
                              <Telephone>
                                     <FormattedNumber>(888) 888-8888</FormattedNumber>
                                     <!-- Optional. Leaving this value empty is Ok  -->
                              </Telephone>
                       </ContactMethod>
                </PersonalData>
                <EmploymentHistory>
                       <!-- Up to 5 maximum can be passed -->
                       <EmployerOrg>
                              <EmployerOrgName/>
                              <!-- Optional. This is the Employer Name Leaving this value empty
is Ok  -->
                              <PositionHistory>
                                     <OrgName>
                                            <OrganizationName/>
```

```
                                        <!-- Optional. This is the Position or Job title
held. Leaving this value empty is Ok  -->
                                </OrgName>
                                <Description/>
                                <StartDate>
                                        <Year/>
                                        <!-- Optional. This is the Start Year. eg 2000.
Leaving this value empty is Ok  -->
                                </StartDate>
                                <EndDate>
                                        <Year/>
                                        <!-- Optional. This is the End Year. eg. 2004.
Leaving this value empty is Ok  -->
                                </EndDate>
                        </PositionHistory>
                </EmployerOrg>
                <EmployerOrg>
                        <EmployerOrgName/>
                        <!-- Optional. This is the Employer Name Leaving this value empty
is Ok  -->
                        <PositionHistory>
                                <OrgName>
                                        <OrganizationName/>
                                        <!-- Optional. This is the Position or Job title
held. Leaving this value empty is Ok  -->
                                </OrgName>
                                <Description/>
                                <StartDate>
                                        <Year/>
                                        <!-- Optional. This is the Start Year. eg 2000.
Leaving this value empty is Ok  -->
                                </StartDate>
                                <EndDate>
                                        <Year/>
                                        <!-- Optional. This is the End Year. eg. 2004.
Leaving this value empty is Ok  -->
                                </EndDate>
                        </PositionHistory>
                </EmployerOrg>
                <EmployerOrg>
                        <EmployerOrgName/>
                        <!-- Optional. This is the Employer Name Leaving this value empty
is Ok  -->
                        <PositionHistory>
                                <OrgName>
                                        <OrganizationName/>
                                        <!-- Optional. This is the Position or Job title
held. Leaving this value empty is Ok  -->
                                </OrgName>
                                <Description/>
                                <StartDate>
                                        <Year/>
                                        <!-- Optional. This is the Start Year. eg 2000.
Leaving this value empty is Ok  -->
                                </StartDate>
                                <EndDate>
                                        <Year/>
                                        <!-- Optional. This is the End Year. eg. 2004.
Leaving this value empty is Ok  -->
```

```
                                </EndDate>
                        </PositionHistory>
                </EmployerOrg>
                <EmployerOrg>
                        <EmployerOrgName/>
                        <!-- Optional. This is the Employer Name Leaving this value empty
is Ok  -->
                        <PositionHistory>
                                <OrgName>
                                        <OrganizationName/>
                                        <!-- Optional. This is the Position or Job title
held. Leaving this value empty is Ok  -->
                                </OrgName>
                                <Description/>
                                <StartDate>
                                        <Year/>
                                        <!-- Optional. This is the Start Year. eg 2000.
Leaving this value empty is Ok  -->
                                </StartDate>
                                <EndDate>
                                        <Year/>
                                        <!-- Optional. This is the End Year. eg. 2004.
Leaving this value empty is Ok  -->
                                </EndDate>
                        </PositionHistory>
                </EmployerOrg>
                <EmployerOrg>
                        <EmployerOrgName/>
                        <!-- Optional. This is the Employer Name Leaving this value empty
is Ok  -->
                        <PositionHistory>
                                <OrgName>
                                        <OrganizationName/>
                                        <!-- Optional. This is the Position or Job title
held. Leaving this value empty is Ok  -->
                                </OrgName>
                                <Description/>
                                <StartDate>
                                        <Year/>
                                        <!-- Optional. This is the Start Year. eg 2000.
Leaving this value empty is Ok  -->
                                </StartDate>
                                <EndDate>
                                        <Year/>
                                        <!-- Optional. This is the End Year. eg. 2004.
Leaving this value empty is Ok  -->
                                </EndDate>
                        </PositionHistory>
                </EmployerOrg>
        </EmploymentHistory>
        <EducationHistory>
                <!-- Up to 3 maximum can be passed -->
                <SchoolOrInstitution schoolType="university">
                        <School>
                                <SchoolName/>
                                <!-- Optional. This is theEducational Institute.  Leaving
this value empty is Ok  -->
                        </School>
                        <Degree degreeType="bachelors">
```

```
                              <DegreeName/>
                              <!-- Optional. This is the Area of Study.  Leaving this
value empty is Ok  -->
                              <DegreeDate>
                                    <Year/>
                                    <!-- Optional. This is the Grad Year.  Leaving this
value empty is Ok  -->
                              </DegreeDate>
                              <DegreeMeasure>
                                    <EducationalMeasure>
                                          <MeasureSystem/>
                                          <MeasureValue>
                                                <NumericValue/>
                                                <!-- Optional. This is the GPA.
Leaving this value empty is Ok  -->
                                          </MeasureValue>
                                    </EducationalMeasure>
                              </DegreeMeasure>
                        </Degree>
                  </SchoolOrInstitution>
                  <SchoolOrInstitution schoolType="university">
                        <School>
                              <SchoolName/>
                              <!-- Optional. This is theEducational Institute.  Leaving
this value empty is Ok  -->
                        </School>
                        <Degree degreeType="bachelors">
                              <DegreeName/>
                              <!-- Optional. This is the Area of Study.  Leaving this
value empty is Ok  -->
                              <DegreeDate>
                                    <Year/>
                                    <!-- Optional. This is the Grad Year.  Leaving this
value empty is Ok  -->
                              </DegreeDate>
                              <DegreeMeasure>
                                    <EducationalMeasure>
                                          <MeasureSystem/>
                                          <MeasureValue>
                                                <NumericValue/>
                                                <!-- Optional. This is the GPA.
Leaving this value empty is Ok  -->
                                          </MeasureValue>
                                    </EducationalMeasure>
                              </DegreeMeasure>
                        </Degree>
                  </SchoolOrInstitution>
                  <SchoolOrInstitution schoolType="university">
                        <School>
                              <SchoolName/>
                              <!-- Optional. This is theEducational Institute.  Leaving
this value empty is Ok  -->
                        </School>
                        <Degree degreeType="bachelors">
                              <DegreeName/>
                              <!-- Optional. This is the Area of Study.  Leaving this
value empty is Ok  -->
                              <DegreeDate>
                                    <Year/>
```



```
                                             <!-- Optional. This is the Grad Year.  Leaving this
value empty is Ok  -->
                                      </DegreeDate>
                                      <DegreeMeasure>
                                             <EducationalMeasure>
                                                    <MeasureSystem/>
                                                    <MeasureValue>
                                                           <NumericValue/>
                                                           <!-- Optional. This is the GPA.
Leaving this value empty is Ok  -->
                                                    </MeasureValue>
                                             </EducationalMeasure>
                                      </DegreeMeasure>
                               </Degree>
                        </SchoolOrInstitution>
                 </EducationHistory>
                 <UserArea>
                        <BRpartner:codes>
                               <!-- This one has to be exactly same as the vendor
CandidateSupplier.SupplierId.IdValue.-->
                               <BRpartner:code>MIL_Candidate_Upload</BRpartner:code>
                               <!-- This has to be valid Source code -->
                               <BRpartner:code>CFR</BRpartner:code>
                               <!-- This has to be valid job req code -->
                               <BRpartner:code>Mill instafile 2</BRpartner:code>
                        </BRpartner:codes>
                        <BRpartner:candidatetype>Internal</BRpartner:candidatetype>
                        <BRpartner:coverletter/>
                        <BRpartner:resume/>
                        <!-- This section indicates that candidate should be filed into a req with
an HRStatus. The autoreq has to be passed also as a code -->
                        <BRpartner:HRStatus>
                               <BRpartner:status req="Req" date="03-28-
2006">Test</BRpartner:status>
                        </BRpartner:HRStatus>
                        <BRpartner:PostBackResumekey>yes</BRpartner:PostBackResumekey>

                        <BRpartner:candidatetype>External-Manual</BRpartner:candidatetype>
                        <BRpartner:coverletter/>
                        <BRpartner:resume>Tzng Zheng 414 E. 10th Ave 203 Vancouver BC 868-6736
</BRpartner:resume>
                 </UserArea>
          </CandidateProfile>
</Candidate>


  ]]>
  </Payload>
  </Packet>
  </BRpartner:Envelope>
```

Requisition Field Association

Follow the instructions starting on page 7 for creating a draft and mapping an instance of an integration type. See the *Integration Type Details Summary* table on page 56 for more information about this integration type.

To map fields for Field Association:

1. Select Field Association for the Integration Type.
2. Select the Integration Instance.

Note: See the information starting on page 96 for selecting parent and child fields.

3. Select a parent field from the Parent Field Source.
4. Select a child field from the Child Field Source.
5. Click **Add to Mapped Fields**. The Field Association instance is added to the **Mapped Fields** list.
6. Click **Save**.

Business Rules

- You must select both a parent and at least one child field to save the field mapping.
- You cannot delete a parent field for which a child field has been selected. You must remove the child field first.
- You cannot select a field that has already been selected as a parent field as a child field.
- A parent field can have one or more child field, but a child field can have only one parent field.
- A child field cannot be the parent of a sibling field. (In other words, a child field cannot be the parent of another field controlled by its own parent.)
- You cannot set up a circular field association. For example, if Department is a parent to Location and Location is a parent to Business Group, Business Group cannot be the parent to Department.
- You cannot use hidden fields as parent or child fields in field association.

Selecting Parent Fields

This selection list includes the category Standard Requisition Fields. These fields are shared across all requisition forms. In addition, all requisition forms created for your organization are displayed.

You can select one parent field at a time. Once you select a parent field, the **Select Child Field** section becomes active and available for selection.

Important: You must save your selections of parent field and associated child field(s) before you can start mapping the next parent field. If you change the parent field to which child field(s) have been associated but not yet saved, Workbench warns you that you will lose your existing selections.

Selecting Child Field(s)

Mapping Tool for Integrations

Once you select a parent field, the **Select Child Fields** area becomes active and available for selection.

This selection list includes the category Standard Requisition Fields. These fields are shared across all requisition forms.

In addition, all requisition forms created for your organization are displayed.

You can select multiple child fields for a single parent field.

Once you have selected a parent field and one or more child fields, click **Add to Mapped Fields** to add your selections to the **Mapped Fields** section of the page. To remove the mapped parent/child field combination, click .

Mapped Fields

Field	Description
Parent Field Source	The standard requisition field or the requisition form from which the parent field is selected.
Parent Field Name	The name of the parent field.
Child Field Source	The standard req field or the requisition form from which the child field is selected.
Child Field Name	The name of the child field.

Valid Field Types for Parent Fields

Parent fields must contain list options. The following table shows which field types can function as parent fields in a field association and which cannot because they do not contain a list of options.

Field type	Valid Parent?	Notes
Radio	Y	
Single-select	Y	
Checkbox	Y	Children of this parent cannot be numeric, text box, text area or email field types.
Multi-select	Y	Children of this parent cannot be numeric, text box, text area or email field types.
Query-select	Y	When importing new parent field options, the integration feed or import fails and an error message is displayed.
Pull-from list	Y	When importing new parent field options, the integration feed or import fails and an error message is displayed.
Date	N	
Text	N	
Text area	N	
Label	N	
Grid	N	

SSN	N	
Email	N	
Autofill	N	
Numeric	N	

Valid Field Types for Child Fields

The following table shows which field types can function as child fields in a field association and which cannot.

Field Type	Valid Child?	Notes
Radio	Y	Supports one default selection
Single-Select	Y	Supports one default selection
Checkbox	Y	
Multi-select	Y	
Text box	Y	Not for checkbox or multi-select parents
Text area	Y	Not for checkbox or multi-select parents
Numeric	Y	Not for checkbox or multi-select parents
Email	Y	Not for checkbox or multi-select parents
Query-select	Y	
Pull from list	Y	
Date	N	
Label	N	
Grid	N	
SSN	N	
Autofill	N	

Field Association Sample XML


```
<Envelope version="01.00">
      <Sender>
            <Id>HRXMLUSER</Id>
            <Credential>99999</Credential>
            <Email>test@test.com</Email>
            <Acknowledgement
type="httppost">https://hrms.test</Acknowledgement>
            <remoteIP/>
      </Sender>
      <Recipient>
            <Id/>
      </Recipient>
      <TransactInfo transactType="data">
            <TransactId/>
            <TimeStamp/>
      </TransactInfo>
```

```
      <Packet>
            <PacketInfo packetType="data">
                  <PacketId>1</PacketId>
                  <Action>SET</Action>
                  <Manifest>LOCATION_FA</Manifest>
            </PacketInfo>
            <Payload><![CDATA[<?xml version="1.0" encoding="UTF-8"?>
<Association_Data xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
    <languages>EN</languages>
    <Parent fieldname="LOCATION" type="Custom">
        <ParentValue>
            <Code>L1</Code>
            <Description>Location 1</Description>
            <Sort>0</Sort>
            <Status>A</Status>
            <Child fieldname="JOBDESCRIPTION" type="Custom">
                <ChildValue>
                    <TextValue Language="EN">JOB 1</TextValue>
                    <ImportAction>Update</ImportAction>
                </ChildValue>
            </Child>
            <Child fieldname="Department" type="Custom">
                <ChildValue>
                    <Option>DEP 1</Option>
                    <DefaultSelection>Yes</DefaultSelection>
                    <ImportAction>Update</ImportAction>
                </ChildValue>
            </Child>
        </ParentValue>
        <ParentValue>
            <Code>L2</Code>
            <Description>Location 2</Description>
            <Sort>0</Sort>
            <Status>A</Status>
            <Child fieldname="JOBDESCRIPTION" type="Custom">
                <ChildValue>
                    <TextValue Language="EN">JOB 2</TextValue>
                    <ImportAction>Update</ImportAction>
                </ChildValue>
            </Child>
            <Child fieldname="Department" type="Custom">
                <ChildValue>
                    <Option>DEP 2</Option>
                    <DefaultSelection>Yes</DefaultSelection>
                    <ImportAction>Update</ImportAction>
                </ChildValue>
            </Child>
        </ParentValue>
```

```
</Association_Data>]]></Payload>
      </Packet>
</Envelope>
```

Single Sign On (SSO)

Follow the instructions starting on page 7 for creating a draft and mapping an instance of an integration type. See the *Integration Type Details Summary* table on page 56 for more information about this integration type.

To map fields for Single Sign-On:

1. Select Single Sign-On for the Integration Type.
2. Select the Integration Instance.
3. Check at least one of the options:
   - Include Enterprise SSO
   - Include TG SSO
4. Click **Add to Mapped Fields**. The SSO instance is added to the Mapped Fields list. You cannot edit details for Single Sign-On integration types.
5. Click **Save**.

Export

Candidate Export

See Follow the instructions starting on page 7 for creating a draft and mapping an instance of an Integration Type. See the *Integration Type Details Summary* table on page 56 for more information about this integration type.

The options for Candidate Export are:

- **Kenexa Schema**: This is the legacy XML integration for candidate export which exports data from Candidate forms only. See the sample XML on page 102.
- **Kenexa Schema with Req**: This is the legacy XML integration for candidate export. It exports data from Candidate forms and Requisition forms. See the sample XML on page 103.
- **HRXML Schema**: This is the HRXML schema which includes candidate data. See the sample XML on page 105.

Sort Order for Candidate Export Fields

For some fields mapped for the Candidate Export integration type, you can enter a sort order. This value specifies the order of this XML tag relative to other XML tags within the candidate export. The Sort Order field:

- Stores what was entered previously.
- Accepts positive integers (1, 2, 3, …).
- Does not accept negative numbers (-1, -2, -3, …) or Zero (0).

Sample XML for Candidate Export – Kenexa Schema


```
<?xml version="1.0" encoding="UTF-8"?>
<Envelope version="01.00">
      <Sender>
            <Id>EMPLID</Id>
            <Credential>CLIENTID</Credential>
      </Sender>
      <Recipient>
      <Id>http://server123.testcompany.com:8044/b2bhttp/inbound/kenexa</Id>
      </Recipient>
<!-- Target URL where data will be sent -->
      <TransactInfo transactType="data">
            <TransactId>HSCAND19681</TransactId>
            <TimeStamp>5/15/2007 9:21:27 PM</TimeStamp>
```



```
        </TransactInfo>
        <Packet>
              <PacketInfo packetType="data">
                    <PacketId>1</PacketId>
                    <Action>SET</Action>
                    <Manifest>CANDIDATE</Manifest>
              </PacketInfo>
              <Payload><![CDATA[<?xml version="1.0"?>
<CANDIDATE>
        <CANDIDATEID>3972804</CANDIDATEID>
        <REQUISITIONNUMBER>00003997</REQUISITIONNUMBER>
        <BRREQNUMBER>3505BR</BRREQNUMBER>
        <JOBCODE>A01245</JOBCODE>
        <STATUS>Offer Accepted</STATUS>
        <SSN/>
</CANDIDATE>
]]></Payload>
        </Packet>
</Envelope>
```


Additional Notes on Kenexa Schema Sample XML

You can edit the XML tag for the selected field to give it a custom tag name. If you do not change the value for the XML tag, the system, by default, uses the database field name, makes it UPPERCASE, and concatenates multiple words into one word (if database field name contains multiple words); for example, DATABASEFIELDNAME. The XML tag cannot include special characters, such as the hypen (-) or comma (,).

Candidate Payload

The Candidate payload always contains the following five (5) tags:

- CANDIDATEID tag contains a unique candidate identifier (Resume Key).
- REQUISITIONNUMBER contains the client’s optional requisition id number.
- BRREQNUMBER tag contains the 2x BrassRing requisition number.
- JOBCODE tag contains the Job Code associated with the requisition that candidate was hired against.
- STATUS tag contains the HR action that triggered candidate export.

In the envelope section, the <Recipient><Id> node contains target URL where the candidate data will be sent (Post URL). The Customer can specify any custom URL as well as port number for the transfer.

The Target URL must be accessible from the Internet (and not behind a firewall, for example). All other tags in the payload section are custom tags defined by the customer.

Sample XML for Candidate Export – Kenexa Schema with Req


```
<?xml version="1.0" encoding="UTF-8"?>
<Envelope version="01.00">
      <Sender>
            <Id>EMPLID</Id>
            <Credential>CLIENTID</Credential>
      </Sender>
      <Recipient>
      <Id>http://server123.testcompany.com:8044/b2bhttp/inbound/kenexa</Id>
      </Recipient>
<!-- Target URL where data will be sent -->
      <TransactInfo transactType="data">
            <TransactId>HSCAND19681</TransactId>
            <TimeStamp>5/15/2007 9:21:27 PM</TimeStamp>
      </TransactInfo>
      <Packet>
            <PacketInfo packetType="data">
                  <PacketId>1</PacketId>
                  <Action>SET</Action>
                  <Manifest>CANDIDATE</Manifest>
            </PacketInfo>
            <Payload><![CDATA[<?xml version="1.0"?>
<CANDIDATE>
      <CANDIDATEID>3972804</CANDIDATEID>
      <REQUISITIONNUMBER>00003997</REQUISITIONNUMBER>
      <BRREQNUMBER>3505BR</BRREQNUMBER>
      <JOBCODE>A01245</JOBCODE>
      <STATUS>Offer Accepted</STATUS>
      <SSN/>
</CANDIDATE>
]]></Payload>
      </Packet>
      <Packet>
            <PacketInfo packetType="data">
                  <PacketId>2</PacketId>
                  <Action>SET</Action>
                  <Manifest>REQUISITION</Manifest>
            </PacketInfo>
            <Payload><![CDATA[<REQUISITION language="en"><REQFORM
id="111">Test REQ</REQFORM>
      <JOBCODE>A01245</JOBCODE>
      <JOBDESCRIPTION>Test </JOBDESCRIPTION>
      <JOBTITLE>Manager Plant Engineering</JOBTITLE>
      <OPTIONALREQNUMBER>00005897</OPTIONALREQNUMBER>
      <JOBFUNCTION>Trade</JOBFUNCTION>
</REQUISITION>
]]></Payload>
                                                       </Packet>
</Envelope>
```

Sample XML for Candidate Export – HRXML Schema


```
<Candidate xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns="http://ns.hr-
xml.org/2007-04-15">
	<CandidateRecordInfo>
		<Id>
			<IdValue>23463</IdValue>
		</Id>
	</CandidateRecordInfo>
	<CandidateProfile>
		<PersonalData>
			<PersonName>
				<GivenName>Jane</GivenName>
				<MiddleName>J</MiddleName>
				<FamilyName>Doe</FamilyName>
			</PersonName>
			<ContactMethod>
				<Location>home</Location>
	<InternetEmailAddress>Jane.Doe@comcast.net</InternetEmailAddress>
				<PostalAddress>
					<CountryCode>United States</CountryCode>
					<PostalCode>64637</PostalCode>
					<Municipality>Raymore</Municipality>
					<DeliveryAddress>
						<AddressLine>574 Hodge Lane</AddressLine>
						<StreetName/>
					</DeliveryAddress>
				</PostalAddress>
			</ContactMethod>
			<ContactMethod>
				<Location>office</Location>
				<Telephone>
					<FormattedNumber/>
				</Telephone>
			</ContactMethod>
			<ContactMethod>
				<Location>onPerson</Location>
				<Telephone>
					<FormattedNumber>555-444-3333</FormattedNumber>
				</Telephone>
			</ContactMethod>
			<PersonDescriptors>
				<LegalIdentifiers>
					<PersonLegalId>
						<IdValue>999-88-7777</IdValue>
					</PersonLegalId>
				</LegalIdentifiers>
```

```
                        <DemographicDescriptors>
                              <Race>WHITE</Race>
                        </DemographicDescriptors>
                        <BiologicalDescriptors>
                              <DateOfBirth>Oct 28 1971 12:00AM</DateOfBirth>
                        </BiologicalDescriptors>
                  </PersonDescriptors>
            </PersonalData>
            <EmploymentHistory>
                  <EmployerOrg>
                        <EmployerOrgName>DATA SYSTEMS INC</EmployerOrgName>
                        <PositionHistory>
                              <Title>HUMAN RESOURCES ADMN</Title>
                              <StartDate>
                                    <Year>2000</Year>
                              </StartDate>
                              <EndDate>
                                    <Year>2008</Year>
                              </EndDate>
                        </PositionHistory>
                  </EmployerOrg>
                  <EmployerOrg>
                        <EmployerOrgName>DRILL TECHNOLOGIES
INC</EmployerOrgName>
                        <PositionHistory>
                              <Title>SERVICES MANAGER</Title>
                              <StartDate>
                                    <Year>1998</Year>
                              </StartDate>
                              <EndDate>
                                    <Year>2000</Year>
                              </EndDate>
                        </PositionHistory>
                  </EmployerOrg>
                  <EmployerOrg>
                        <EmployerOrgName>Employer 3</EmployerOrgName>
                        <PositionHistory>
                              <Title>DATA CONTROL ENG</Title>
                              <StartDate>
                                    <Year>1987</Year>
                              </StartDate>
                              <EndDate>
                                    <Year>1997</Year>
                              </EndDate>
                        </PositionHistory>
                  </EmployerOrg>
            </EmploymentHistory>
            <EducationHistory>
```



```
				<SchoolOrInstitution schoolType="">
					<SchoolName>LSU</SchoolName>
					<Degree degreeType="General">
						<DegreeName>ASSOCIATES</DegreeName>
						<DegreeDate>
							<Year/>
						</DegreeDate>
						<DegreeMeasure>
							<EducationalMeasure>
								<MeasureSystem>GPA</MeasureSystem>
								<MeasureValue>
									<StringValue/>
								</MeasureValue>
							</EducationalMeasure>
						</DegreeMeasure>
					</Degree>
				</SchoolOrInstitution>
			</EducationHistory>
			<UserArea>
				<Id idOwner="LicensingAgency">
					<IdValue>CA</IdValue>
				</Id>
				<Id idOwner="LicenseNumber">
					<IdValue>784782323</IdValue>
				</Id>
				<Id idOwner="EffectiveDate">
					<IdValue>Sep 20 2017 12:00AM</IdValue>
				</Id>
				<Id idOwner="LicenseDescription">
					<IdValue>Class:C</IdValue>
				</Id>
				<Id idOwner="LicenseName">
					<IdValue>Motor Vehicle</IdValue>
				</Id>
			</UserArea>
		</CandidateProfile>
</Candidate>
```

Additional Notes for HR XML Candidate Export

Certain parts of the HR XML Candidate export XML structure can vary based on the implementation requirements. For instance, the <UserArea>…</UserArea> block will contain 100% custom data definitions.

Another way the resulting XML can be different is inclusion or exclusion of certain components in the <CandidateProfile>…</CandidateProfile> block.

Prospective Media Services Integration

Kenexa has enhanced Kenexa 2x BrassRing's posting options to include Prospective Media's *FastInterface*, a job distribution platform for posting job requisitions to print and online media.

Date Available	US: 07/Jan/2010 EU: 13/Jan/2010
Cost	☐ No additional cost ☑ Additional cost – contact your CSC for details.
Product or Module	☑ Workbench ☑ Workbench – Clients ☑ 2x BrassRing - New UI ☑ 2x BrassRing - Classic ☐ Talent Gateways ☐ Agency Manager ☐ Data Insight Tool ☐ SmartApproval ☐ Candidate Export
Visible Changes	☑ No – contact your CSC for implementation details. ☐ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☑ Specific conditions required – see details below. ☑ Configuration required – contact your CSC for details. ☑ Integration required – contact your CSC for details.

Benefits

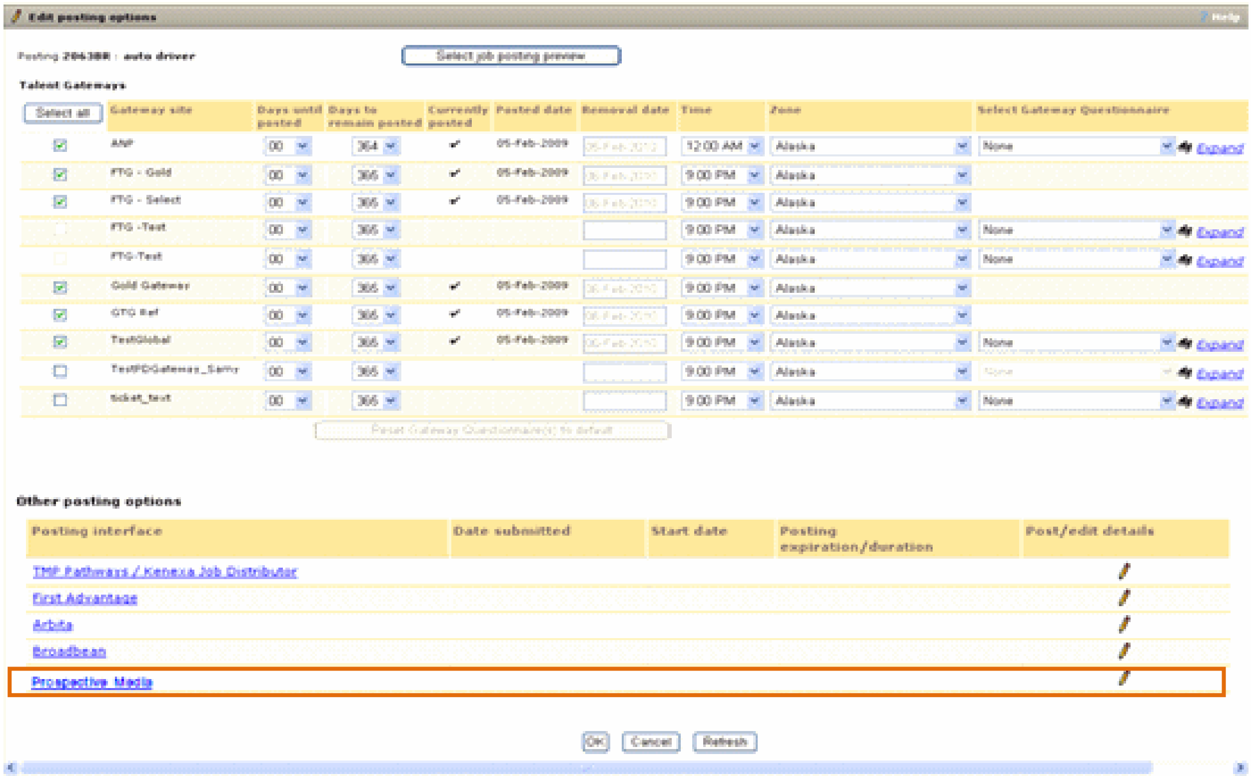
Kenexa 2x BrassRing is continually expanding the number and types of 3rd-partyintegrations it supports to job distribution partners with different specialties and venues.

Feature Description

2x BrassRing User(s) with the appropriate user type privileges can post to Prospective Media once it is available as long as the requisitions are in English, French, Italian or German.

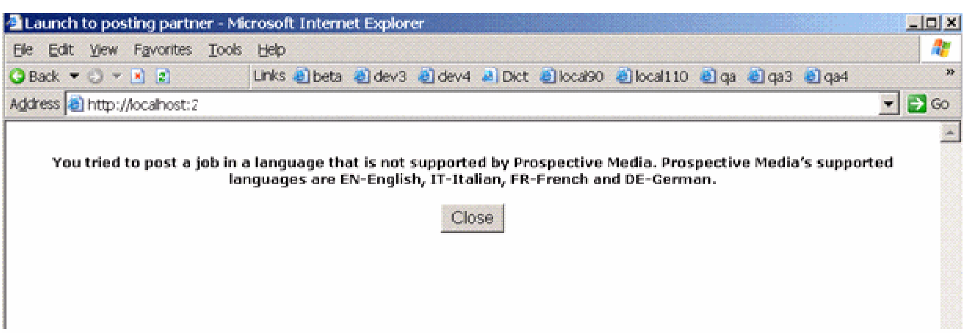
The workflow for posting new requisitions to Prospective Media's job distribution system is:

1. Create the requisition in Kenexa 2x BrassRing.
2. Navigate to a Reqs open page.
3. Select **Posting options** for that requisition.
4. The **Edit Posting options** page displays.



5. If your organization has purchased a Prospective Media subscription, Prospective Media is listed as one of the posting options. Click the **Post/edit details** icon for Prospective Media.
6. The system validates that the language of the selected requisition is one of prospective Media's supported languages (English, French, Italian, or German).

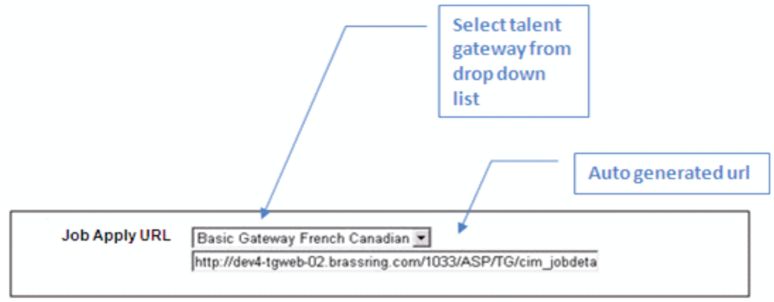
Note: If the requisition language is not supported, the following message displays:



7. The **Intermediate Posting Details** page launches. It is pre-populated with data for fields mapped between 2x BrassRing and Prospective Media Services.

Routing the Candidate to the Desired Talent Gateway

Once you or the recruiter has created a requisition and navigated through the requisition posting process to the intermediate screen, you must enter the URL link that routes the candidate back to the desired talent gateway. You can select one Talent Gateway.



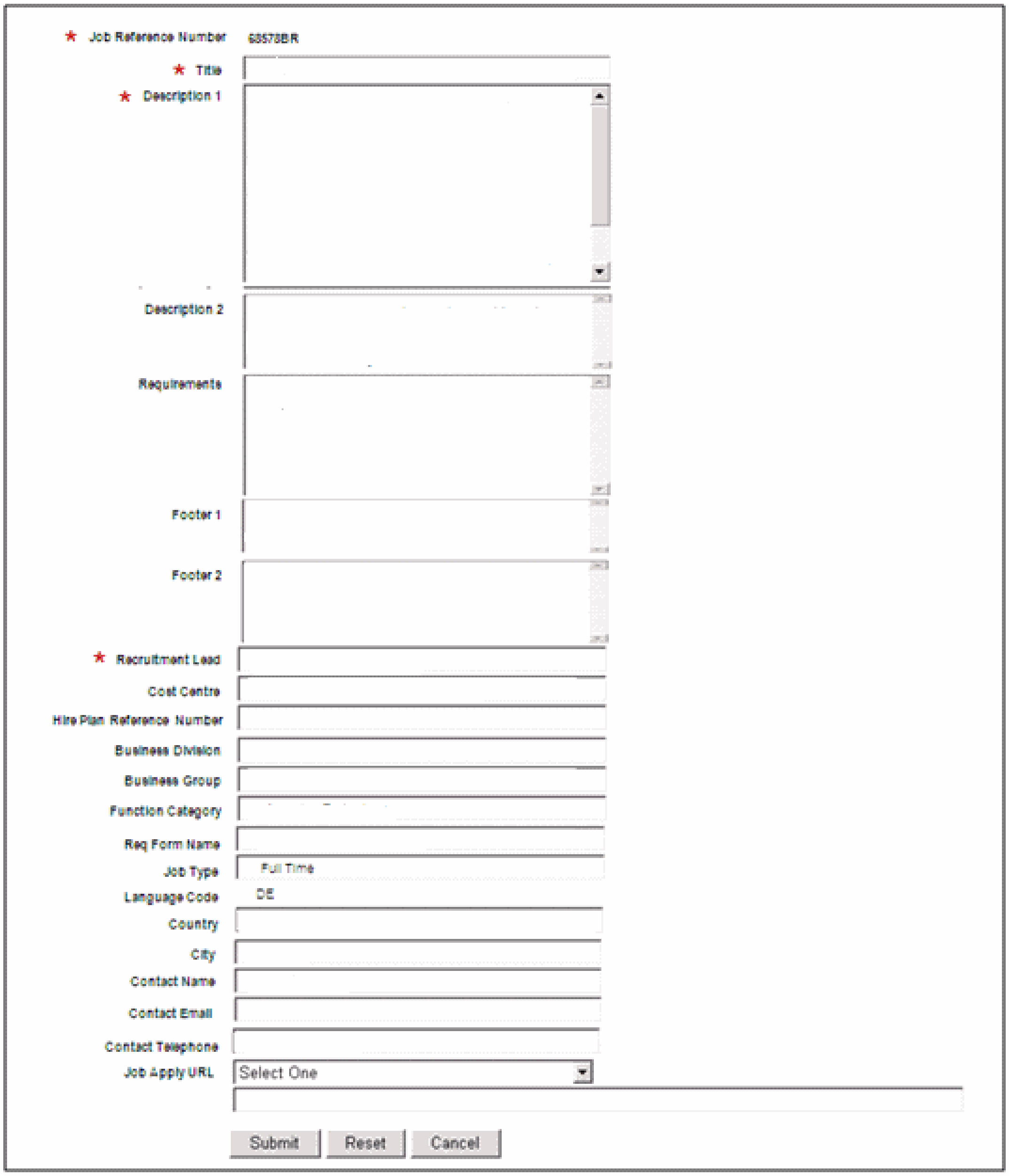
The application URL automatic generation process works as follows:

- Posting the requisition for the first time on one TG: The system will automatically generate and load the application URL.
- Posting the requisition for the first time on multiple TGs: The recruiter must select the appropriate gateway. The system will then automatically generate and load the application URL.
- The Application URL drop-down selections display the Talent Gateway names as configured, regardless of language. Note: The Kenexa Job Apply URL and Prospective Media Direct link are identical. **Note:** Because the Job Apply URL is not a required field, if no URL is entered, it will be passed to Prospective Media without a link.

When you click **Submit**, the system validates required fields and sends the file. If one or more required fields is not complete: The system displays a standard error notification advising the customer to fill in the field.

The Prospective Media posting site login screen (http://www.prospective.ch/) launches. You can log in and complete the posting.

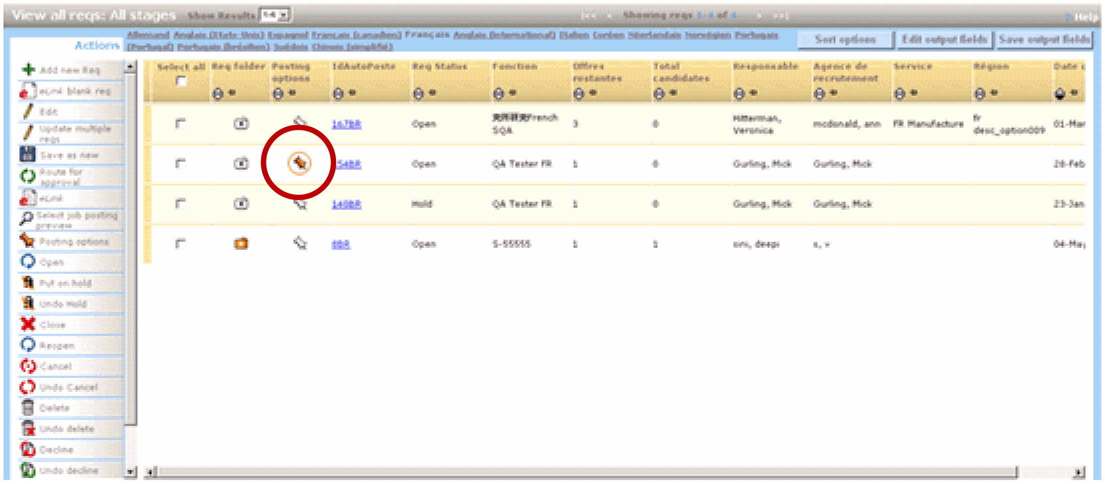
8. Select the name link. [I don't know what this refers to.] The **Prospective Media** page launches. You can complete the posting on this page.



Notification

Reqs posted to Prospective Media display the orange pushpin. Notifications associated with these postings also display the orange pushpin.

grids in 2x BrassRing indicate reqs posted to Prospective Media through the FastInterface in the same mannare The customer will be able to see if the requisition has been posted to an external source utilizing the same standard KRB globe icons. The standard orange globe posting notification functionality will be used to signify that the posting has been sent. Since the Prospective Media Fast Interface is a uni-directional interface, where data flows in only one direction from Kenexa to the Fast Interface, there is no method to confirm the postings success. Once the globe has been set, it will remain that way forever.



Limitations and Known Issues

FastInterface handles requisitions in the follow languages: English, Italian, French, and German. 2x BrassRing does not allow posting of a requisition to Prospective Media that is not in one of those four languages.

Because FastInterface primarily uses a uni-directional http post method, successful post return notification, automated editing, and posting removal are not included in this 2x BrassRing integration.

This integration does not use the Kenexa Common Services platform.

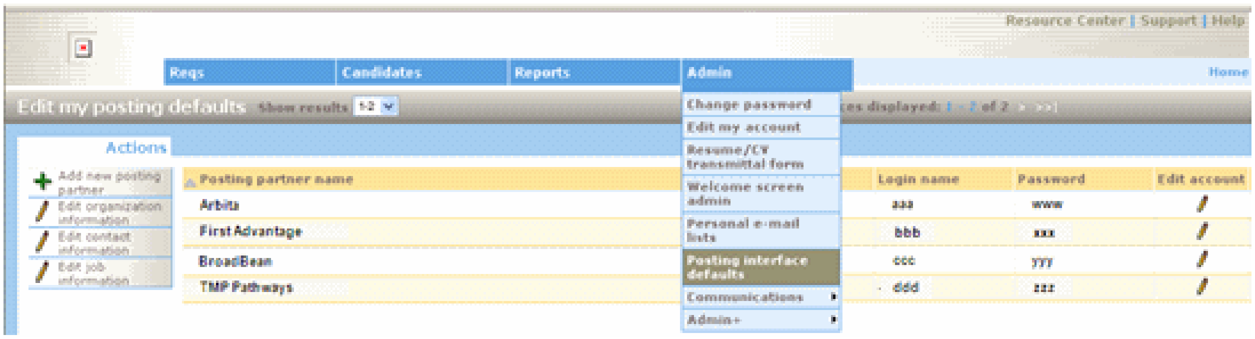
To edit a posted requisition, do your edits as usual in 2x BrassRing.

How Do Clients Get this Feature?

Customers purchase their own Prospective Media suite and complete the on-boarding process with the assistance of their Kenexa consultant and designated Prospective Media representative. Contact your Kenexa Consultant for more information.

2x BrassRing Admin/Admin+

Your 2x BrassRing administrator must configure posting interface defaults for Prospective Media Services once the integration has been implemented in the back end.



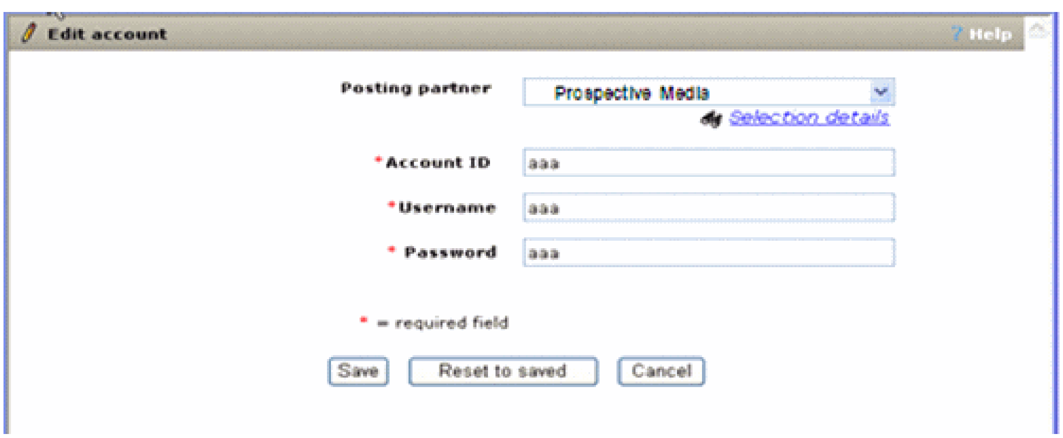
To configure posting interface defaults:

1. In 2x BrassRing, select **Admin > Posting interface defaults**.

2. Click **Add new posting partner** to add Prospective Media Services. Or, if Prospective Media is already listed in the grid, click the **Edit account** icon for it.

3. Enter the account information and click **Save**. (Contact your Kenexa consultant for details.)

4. Once this is configured, 2x BrassRing passes the required login information each time 2xB users try to access Prospective Media Services.



REMOVE TABLE FOR EXTERNAL DOC

Prospective Description	Intermediate Page Label (2xB)	Posting Field (2xB)	Req Form Detail	Sample Content Req Form	2xB Field Type	2xB Req’d	2xB Edit-able	2xB Map-pable
kundeStelleId	Req ID	Job Requisition ID	Job Reference #	55555BR	Alpha-numeric	x		
kundeStelleTitel	Job Title	Job Title	Posting Title	Currency Trader	varchar (255)	x	x	x
feld_210	Job Description	Job Description	Description	Fortune 500 Company is seeking to recruit aCurrency Trader asap till end of June 2010 to join the team within the Foreign Currency Department.	text	x	x	x
feld_220	Requirements	Job Qualifications	Requirements	· At least 1 year experience in a international banking environment, preferably within Asset Management or in a legal/regulatory/data management environment · The ability to work under pressure as part of a team · Eager to learn · Accuracy and attention to detail	text	x	x	x
feld_230	Job Benefits	Job Benefits	Our Offering	Company can offer you career opportunities, and an entreprenurial culture that values and rewards the contribution of every individual.	text	x	x	x
kundeStelleOwner	Recruitment Lead ID	Recruiter Number	Recruiter	Clarkson, Frederica(005555555) [Only Employee ID is used]	text	x		
kundenStelleKostenStelle	Cost Center	Cost Center	Cost Centre	BU7Y: INVESTMENT GUIDELINE MONITORING AM	varchar (30)	No	x	x
kundeStelleInterneNummer	Hire Plan Reference Number	Hire Plan Ref Number	Hire Plan Reference No.	CRO-RM-CR-2009-07-002	varchar (30)	No	x	x
feld_240	Business Division	Job Division	Business Divisions	Global Asset Management	text	No	x	x
feld_300	Footer 1	Message	It starts with you	Did you find what you are looking for? We look forward to hearing from you.	text	No	x	x
feld_310	Footer 2	Footer	Disclaimer / Policy Statements	Company is an equal opportunity employer…	text	No	x	x
feld_320	Function Category	Job Category	Function Category	Banking Services	text	No	x	x

Prospective Description	Intermediate Page Label (2xB)	Posting Field (2xB)	Req Form Detail	Sample Content Req Form	2xB Field Type	2xB Req'd	2xB Edit-able	2xB Map-pable
feld_330	Req Form Name		[Not Displayed - pulls Req Form Display Title from Workbench]	Field/Value not displayed on req. Example value: "CH/EMEA - Professional"	text	No	x	
kundeStelleSprache	[Language Code - Not Displayed - from Req listing tab]		[Not Displayed -pulls from Req Listing Language Code]	Pulls from req listing selection (tabs at top of reqs view before clicking "Edit Posting options") Example value: "FR" (for French)	varchar (2)	x		
techNode	[Not Displayed - from Acct Info]		[Not Displayed - pulls from user's Posting Interface Default Account ID value]	Not displayed on the req. Example value: "304"	varchar (50)	x		
feld_340	Country	Job Country	Country	France	text	No	x	x
feld_350	City	Job City	City	Strasbourg	text	No	x	x
feld_360	Job Type	Job Type	Job type	Full Time	text	No	x	x
feld_370	Contact Details		[Not Displayed - will be used only on intermediary posting page]	Contact Details should not be selected to display on Req - instead we pull values from other 5 fields displayed on req to display on intermediary page (see below).	text	No	x	
N/A	Contact Title	Contact Title	Company Human Resources Recruitment	<u>Combined into Contact Details, example:</u> Company Human Resources Recruitment Mr. A. Malik amalik@company.com '+41-44-234 56 78	text	N/A [ties into Contact Details]	x	Job Contact Title
N/A	Contact First Name	Contact First Name	Arturo	<u>Combined into Contact Details, example:</u> Company Human Resources Recruitment Mr A. Malik amalik@company.com '+41-44-234 56 78	text	N/A [ties into Contact Details]	x	Job Contact First Name

Prospective Description	Intermediate Page Label (2xB)	Posting Field (2xB)	Req Form Detail	Sample Content Req Form	2xB Field Type	2xB Req'd	2xB Edit-able	2xB Map-pable
N/A	Contact Last Name	Contact Last Name	Malik	Combined into Contact Details, example: Company Human Resources Recruitment Mr. A. Malik amalik@company.com '+41-44-234 56 78	text	N/A [ties into Contact Details]	x	Job Contact Last Name
N/A	Contact Email	Contact Email	amalik@company.com	Combined into Contact Details, example: Human Resources Recruitment Mr A. Malik amalik@company.com '+41-44-234 56 78	text	N/A [ties into Contact Details]	x	Job Contact Email Address
N/A	Contact Phone		+41-44-234 5678	Combined into Contact Details, example: Human Resources Recruitment Mr A. Malik amalik@company.com '+41-44-234 56 78	text	N/A [ties into Contact Details]	x	Job Contact Work Phone

Updating Associated Fields When Editing a Req's Job Code

A new client setting enables 2x BrassRing to update the auto-populated fields associated with a job code when a user edits Job Code for a requisition that is not yet open. The fields that automatically update include: Job Title, FLSA, Job Family, Salary Grade, EEO Category, EEO Group, Salary Admin Plan, Payroll Class, Current Years of Experience, Comp Frequency, and Job Function.

Product	☐ Workbench Self-Service ☐ New UI ☑ 2x BrassRing ☐ Talent Gateways ☐ Agency Manager ☐ Data Insight Tool ☐ SmartApproval
Visible Changes	☑ No – contact your CSC for implementation details. ☐ Yes – see the cumulative Visible Changes document sent out for each build in the release.
How Do I Get this Feature?	☑ Automatic ☐ Specific conditions required – see details below. ☑ Configuration required – see details below.

Benefits

KRB users save time when updating requisitions, and your organization maintains data consistency more easily.

Feature Description

A new client setting enables 2xB to update the auto-populated fields associated with a job code when a user edits the Job Code for a saved req in any Req Status, including: **Pending**, **Approved**, **Open**, **On hold**, **Canceled**, **Deleted**, or **Declined**. Such fields often include

Job Code Default Data (JCDD) fields containing values in the newly-selected Job Code will automatically update and override the current values. If a JCDD field does not have a value, the saved value in the requisition remains unchanged.

JCDD field are configurable, and often include: Job Title, Job Description, FLSA, Job Family, Salary Grade, EEO Category, EEO Group, Salary Admin Plan, Payroll Class, Current Years of Experience, Comp Frequency, and Job Function. These values are updated with the new job code's default data even if they've previously been modified by a user. However, an associated field for which the new job code has no default data is not overwritten – the previous value remains (unless it is an "orphaned" child as described below for interactions with Req Field Associations).

Job Code Default Data Interactions

Other JCDD interactions to be aware of concern Requisition Field Association (RFA), Approval routing, and Talent Gateway default data.

- Interaction with Req Field Associations
  Changing the Job Code and having the JCDD auto-fill forces a refresh of Req Field Associations (RFA). If the JCDD changes a RFA parent value (e.g.. Business Group), the RFA child (Department) is set to " " when the JCDD does not have a value and the previously-saved value is not one of the valid RFA child values.
- Approval routing default data
  If JCDD has values for Approval levels, the approvers are overwritten only for requisitions in a **Pending** or **Declined** status. Even Approvers who have already approved the requisition are overwritten (despite the fact they are not editable manually), and the change in the requisition will force a re-routing of the requisition (as would the change to any field other than Req Notes).
- Talent Gateway default data
  Talent Gateway defaults apply only to requisitions that have never been posted.
- "Save as new" behavior
  When a user utilizes the "Save as new" functionality and changes a Job Code, the default data should behave as a new requisition: Approval routing data should be overwritten and updated with the destination Job Code default data (if available). Talent Gateway data should be overwritten as this requisition has never been posted.

Limitations and Known Issues

- If a req is posted to any Talent Gateway, Talent Gateway default data is not overwritten (but other default data fields associated with the Job Code do default).
- Job Codes containing default data for Approval levels are updated only for Requisitions in a **Pending** or **Declined** status.
- Changes to Job Code default data (either manually or through integrations) do not prompt the update of the data in existing reqs with that Job Code.
- Requisitions created or updated through integrations (XML or non-XML) do not auto-populate associated fields because the integrations do not utilize the JCDD auto-population functionality -- they populate all req data from the integration source data.

How Do Clients Get this Feature?

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

New User Interface Enhancements

Enhancements have been added to the 2x BrassRing New User Interface (New UI). They include:

- Drag and drop functionality for rearranging or moving links and categories on the Quick Links panel.
- Test link feature for Workbench users configuring new links for the Quick Links panel.
- Sorting for additional columns on Req Panels
- Improved accessibility keyboard shortcuts useful to users with and without disabilities.

Date Available	US: 22/APR/2010 EU: 28/APR/2010
Product	☑ Workbench Self-Service ☑ New UI ☐ 2x BrassRing ☐ Talent Gateways ☐ Agency Manager ☐ Data Insight Tool ☐ SmartApproval
Visible Changes	☐ No – contact your CSC for implementation details. ☑ Yes – see the cumulative Visible Changes document sent out for each build in the release.
How Do I Get this Feature?	☑ Automatic with no configuration required. ☐ Specific conditions required – see details below. ☐ Configuration required – see details below.

Benefits

The new features add convenience and guarantee fewer errors and improved efficiency.

Feature Description

Enhancements added to the New UI include:

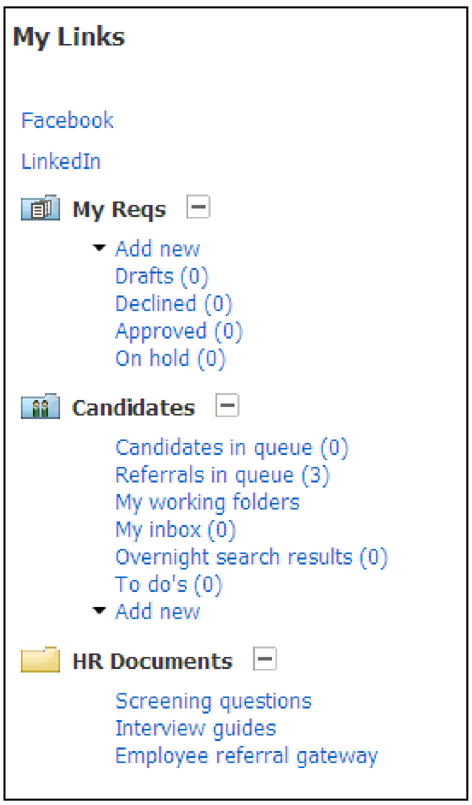
- Drag and drop functionality for added convenience when users rearrange or move their links and link category folders.
- Test button for easily verifying a new or changed external link when configuring the Quick Links panel in Workbench.
- Sorting on additional columns for Req panels, including My Open Reqs, All Open Reqs, My Reqs Pending Approval.
- Keyboard shortcuts useful to users with and without disabilities in line with Web Content Accessibility Guidelines best practices.

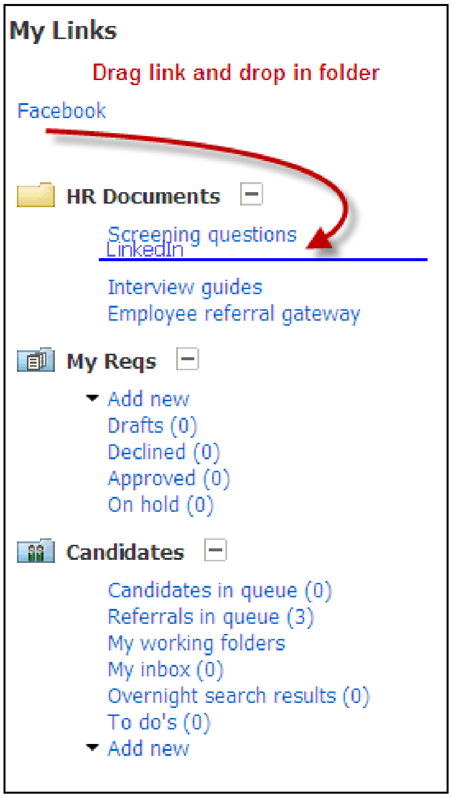
These features are described in the following sections.

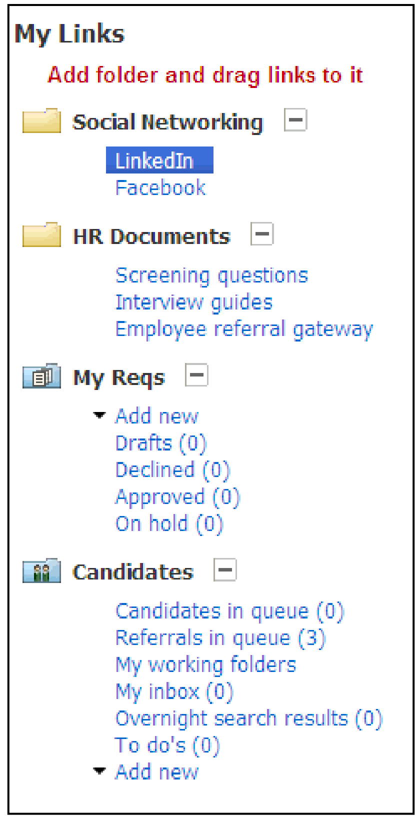
Rearranging Links with Drag and Drop Convenience

Kenexa 2x BrassRing™ users can rearrange their links and link folders if the "Allow users to add and remove links and categories" attribute is set for their Quick Links panel.

- To move an entire folder: click on the folder and hold, drag it to the desired location, and drop it.
- To move a standard or external link within a folder: click on the link and hold, drag it to the desired position, and drop it.
- To move an external link from one custom folder to another, or to move an uncategorized external link into a custom folder: click on the link and hold, drag it to the desired folder (and position, if you expanded the target folder), and drop it.
  You cannot move a standard link (from My Reqs or Candidates standard blue folders) to any other folder, nor can you move an external link into a standard folder.







Uncategorized links are grouped together (possibly, though rarely, grouped in more than one area on the panel). You can move an external link into an area with one or more uncategorized links, as long as the section already exists and the link is moved into that section only. However, you cannot move an entire group of uncategorized links. If you wish to change the location of the uncategorized section, move the existing folders around it to achieve the desired location.

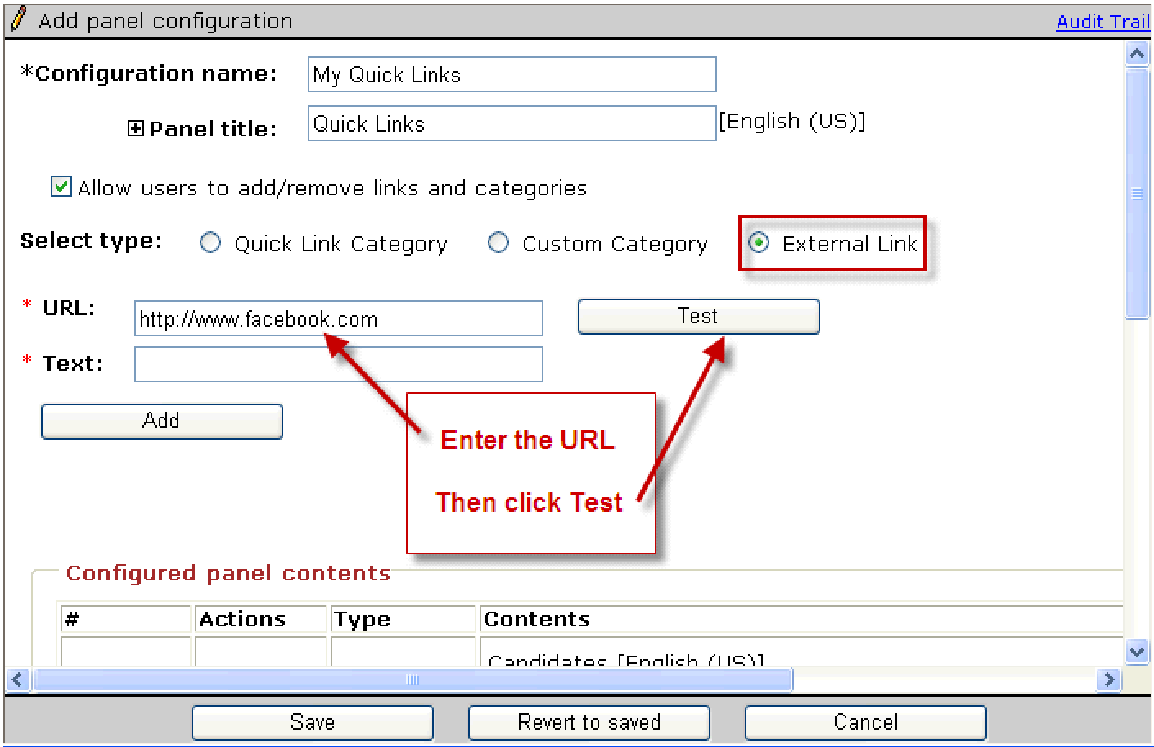
Testing Links for Quick Links Panel Configuration

In Workbench for Tier 4certified users, a new **Test** button is available for testing external links when configuring them for the Quick Links panel. The new button is available on the **Add panel configuration** and **Edit panel configuration** pages.

To test a link when adding a new configuration:

1. In Workbench, select **Tools** > **Settings** > **Panel configuration**.
2. Click the Administer configuration icon for the Quick Links panel.
3. Click **Add new configuration**.

4. To add and test a new external link, select the External Link item type.



5. Enter the link's URL, then click **Test**. The link target opens in a popup window.

6. Close the popup using the browser's close function.

7. If necessary, correct the link and re-test it. When the link is correct, enter the display text for it and click **Add**.

8. Click **Save** after completing your new configuration.

To test a link when editing a configuration:

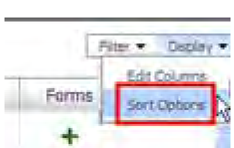
1. In Workbench, select **Tools** > **Settings** > **Panel configuration**.
2. Click the Administer configuration icon for the Quick Links panel.
3. Select a configuration to be edited and click the Edit icon.
4. If correcting a link, delete it by clicking its delete icon.
5. Enter the link's URL, then click **Test**. The link target opens in a popup window.
6. Close the popup using the browser's close function.
7. If necessary, correct the link and re-test it. When the link is correct, enter the display text for it and click **Add**.
8. Click **Save** after making any additional changes to your configuration.

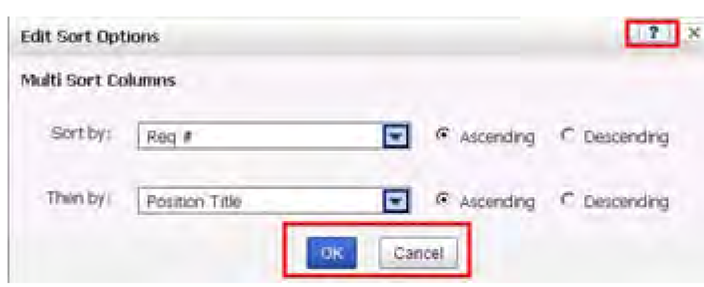
Sorting for Req Panels

Additional columns are sortable on all requisition panels (including My Open Reqs, All Open Reqs, My Reqs Pending Approval). Columns for which sorting was previously unavailable include:

- Req # (numeric order from high to low)
- Custom numeric and date fields (ascending upon first click)
- Text-based field types such as text boxes, radio buttons, and single selects (sort according to text only, with numbers and other characters ignored in the sort)
- Posting Options, Forms, Attachments (grouped by same icon, blanks appear first upon first sort)
- Approve (for My Reqs Pending Approval

The Display menu on requisition panels (including My Open Reqs, All Open Reqs, My Reqs Pending Approval) automatically includes a new option called Sort Options. (No privileges are required for this option – it will be the only one available for users without privileges to edit the panel display; otherwise it appears under the Edit Columns option.) Selecting it launches a req-panel version of the Edit Sort Options widget.

<table>
<tr>
<td>


Selecting Sort Options launches the Edit Sort Options widget, which is similar to the existing widget for Candidate Results. Also includes a help button but does not have a
</td>
<td>


</td>
</tr>
</table>

Save as Default button.	

Accessibility Improvements

All controls can now be conveniently reached via the keyboard alone. The new 2xB user interface is now in level AAA conformance with the World Wide Web Consortium's Web Content Accessibility Guidelines 2.0 best practices. This is a standard far higher than the US Section 508 amendment to the Rehabilitation Act of 1973.

Beyond basic use of TAB and SHIFT + TAB to navigate forward and backward between consecutive controls, the new user interface now features powerful custom shortcut keys of use to all users. For example, pressing SHIFT + ARROW anywhere in the new user interface navigates between panels.

Keyboard navigation through some specific areas of the new user interface is detailed below.

Panel Navigation for Quick Links

The first focusable item in the Quick Links Panel is the primary menu item in the Add menu. The menu follows the rules outlined in the *Menus* section below. From the last Add menu item, focus moves to the first link or the Expand/Hide icon of the first folder. Focus proceeds from top to bottom within the body of the panel, and "hidden" links do not receive focus when their folder is not expanded. Links beyond the top or bottom border of the panel cause the panel to scroll up or down when they receive focus.

Other keys used include:

- ENTER expands or hides folder contents when an Expand/Hide icon has focus, or opens the link when a link has focus.
- SHIFT+F10 or MENU are keyboard shortcuts that open the contextual menu when a link has focus (MENU is located between ALT and CTRL to the right of the spacebar). The contextual menu follows the rules for mouse-free navigation described in the *Menus* section below.
- ESC button closes the contextual menu opened by MENU or SHIFT+F10.

Grid Panel Navigation

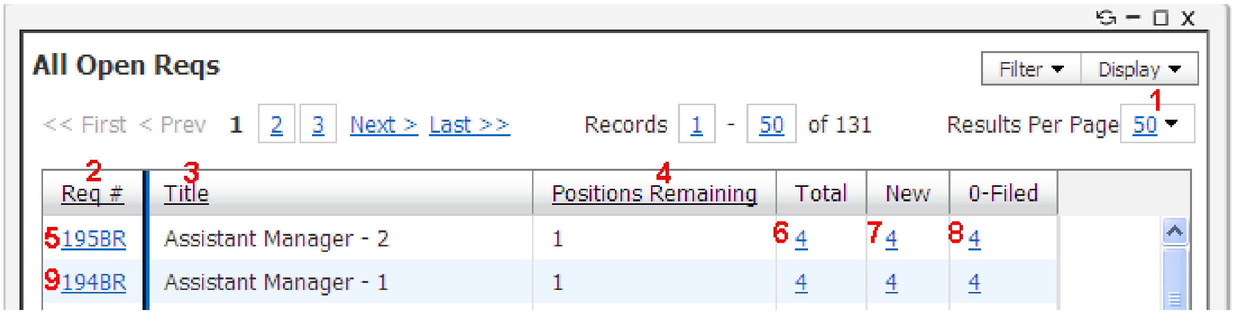
The first focusable element within a grid panel's frame is the first menu item in the main Panel Menu ("Actions", "Filter", or "Display"). The Panel Menu follows the rules of mouse-free navigation described in the *Menus* section below.

If present (for panels such as All Open Reqs and Candidate Results), the next focusable group of items is the row of anchors above the grid. Focus progresses from left to right. Typically the paginator controls are first, and initially the link to the second page is the first enabled (and thus focusable) link. If the data set has only one page, the paginator is not present. The next focusable item is the first record anchor, then the last record anchor, then the Results Per Page menu.

The anchors above the grid as well as the grid itself scroll horizontally. The grid also scrolls vertically. In all cases, when you tab to an element, it will automatically scroll into view.

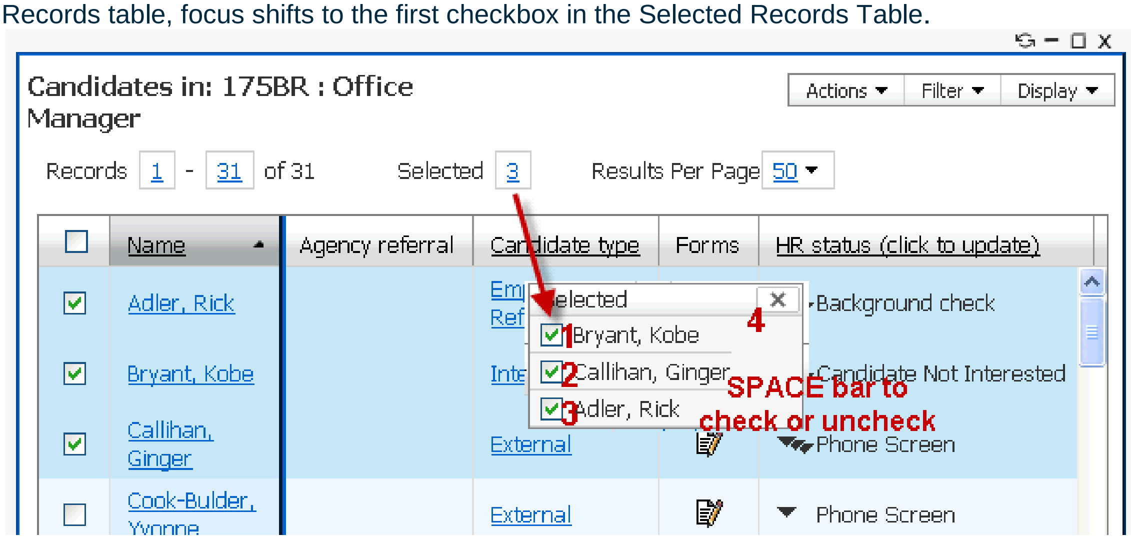
The next item would be the first focusable item within the grid itself. Labels for sortable columns receive focus prior to items in the main data section of the grid. Thus column labels that are underlined receive focus from left to right as you TAB.

Focus then proceeds to the first actionable element within the data section of the grid, for example to requisition 195BR, the top left cell shown in the following figure. From there focus proceeds from left to right and top to bottom, as usual.



Selected Records in Candidate Results Grid

When the Selected Records anchor in the Paginator area above a grid is clicked to launch the Selected Records table, focus shifts to the first checkbox in the Selected Records Table.



- SPACE bar checks and unchecks the checkboxes.
- TAB moves focus between the close icon and the checkboxes. The close icon precedes the first checkbox, so you can SHIFT+TAB to reach it from initial focus on the first checkbox.
  When visible, the Selected Records table is TAB-indexed between the last anchor in the Paginator area (the Results Per Page menu) and the grid – that is, you can TAB or SHIFT+TAB to it in that location if it is open.
- ENTER, while the close icon has focus, closes the Selected Records table and move focus back to the Selected Records anchor.

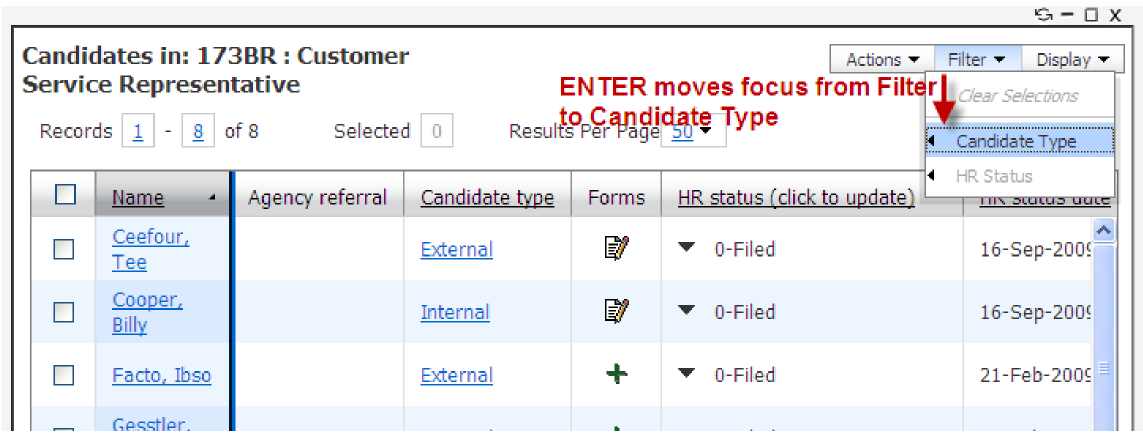
When the HR Status Editor in multi-edit mode launches Selected Records table automatically, focus moves to the HR Status Editor (instead of Selected Records table).

Menus

Within the top-level menu-bar (such as "Actions," "Filter, or "Display"), use:

- TAB and SHIFT+TAB navigates between menu items and LEFT-ARROW (←) and RIGHT-ARROW (→) for sub-menu items.
- ENTER or DOWN-ARROW (↓) displays the corresponding submenu when a top-level menu-bar item is in focus.

When you open a submenu, the first enabled menu item in the submenu receives focus, and the top-level menu-bar item remains highlighted. Disabled menu items, if present, are skipped.



In a submenu, use:

- TAB and SHIFT+TAB navigates between both *enabled and disabled* menu items.
- ↑ and ↓ arrow keys navigates between *enabled* menu items only. Arrow keys are circular in effect within a menu or submenu. When the last menu item is in focus, the ↓ key places the first menu item in focus. When the first menu item is in focus, the ↑ key places the last menu item in focus. The arrow keys alone cannot be used to navigate away from any menu in the application.
- ← opens the sub-submenu corresponding to the current submenu item on a vertically-oriented submenu. Currently, all submenus in the New UI that have submenus are left-handed, so ← will open the appropriate submenu from within another submenu. For example, in the preceding figure pressing ← opens the "Candidate Type" submenu, and sets focus to its first item.
- ESC closes a submenu and restores focus to its parent menu item.

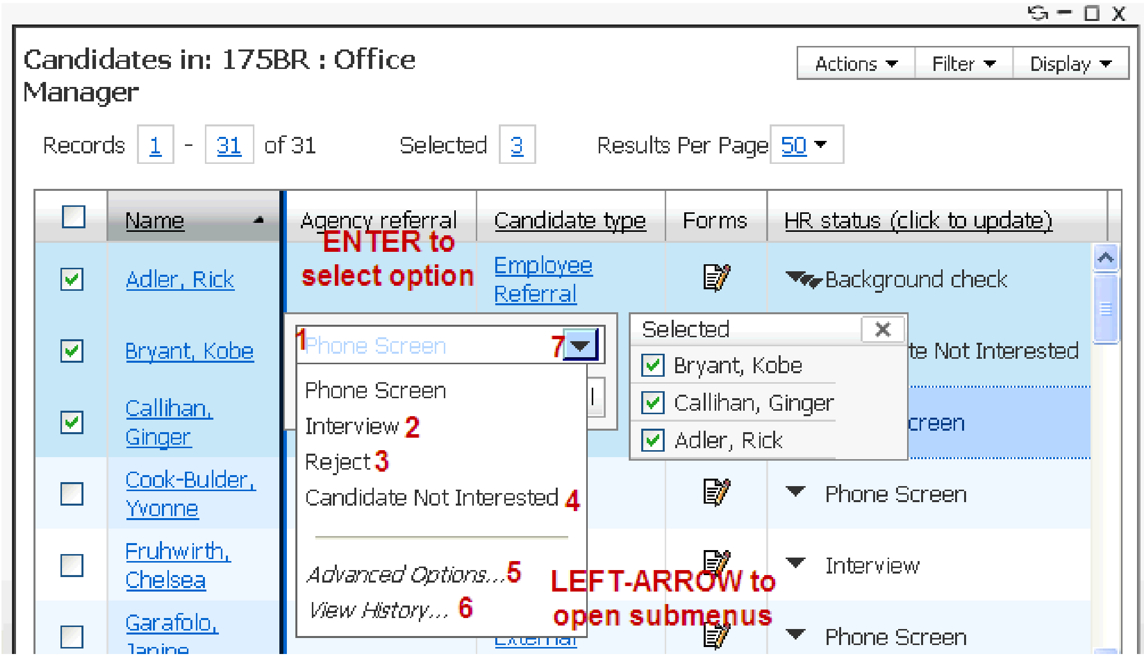
HR Status Editor

The HR Status Editor works like a menu. When launched, it focuses on the first option in the dropdown. Visible HR Status Editor options and the blue drop-down arrow icon are focusable items.

- TAB or SHIFT+TAB move focus between the options.
- ENTER selects an option (and closes the drop-down, functioning like a click on an option). Focus moves automatically to the Save button when the drop-down menu hides. (Pressing ENTER when

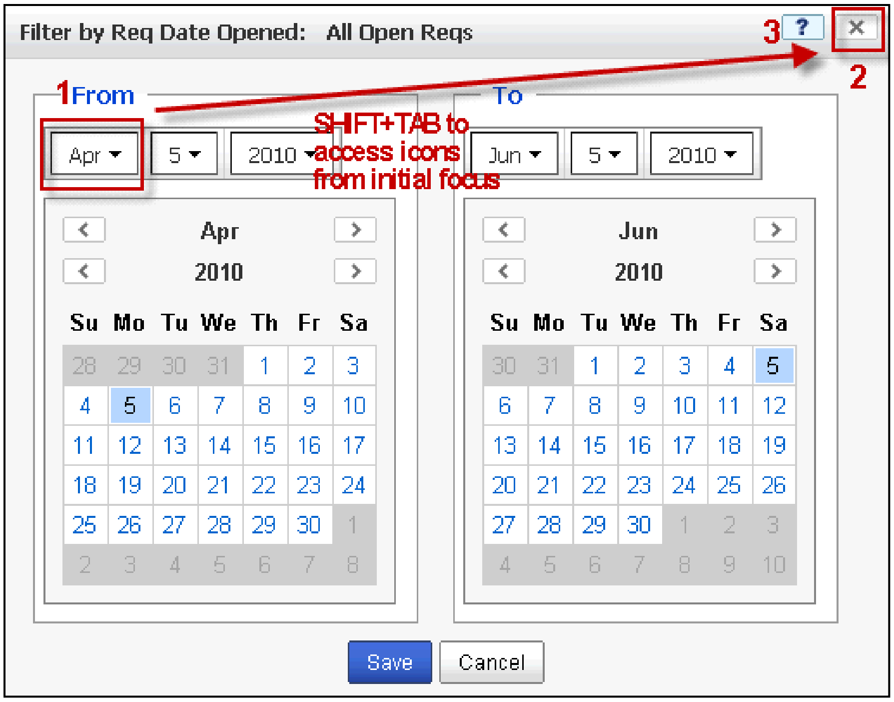
focus is on the dropdown control arrow opens the dropdown menu. Then TAB or SHIFT+TAB moves focus to the desired item, and ENTER selects it.)

When you close the HR Status Editor using the Close icon, Cancel button, or Save button, focus returns to the cell that you clicked to launch the editor.



Dialog Boxes

Accessible dialog boxes include Edit Columns, Date Picker, Save Current Filter, Manage Saved Filters, Sort Options, and Choose Scaled Select (from the filter selection menu). In general, dialog boxes set focus to the first actionable item in the body of the widget upon first opening. For example, in the Date Picker, the first actionable item is the month menu in the "From" section. You can access the Help and Close icons with SHIFT+TAB and then ENTER to select.

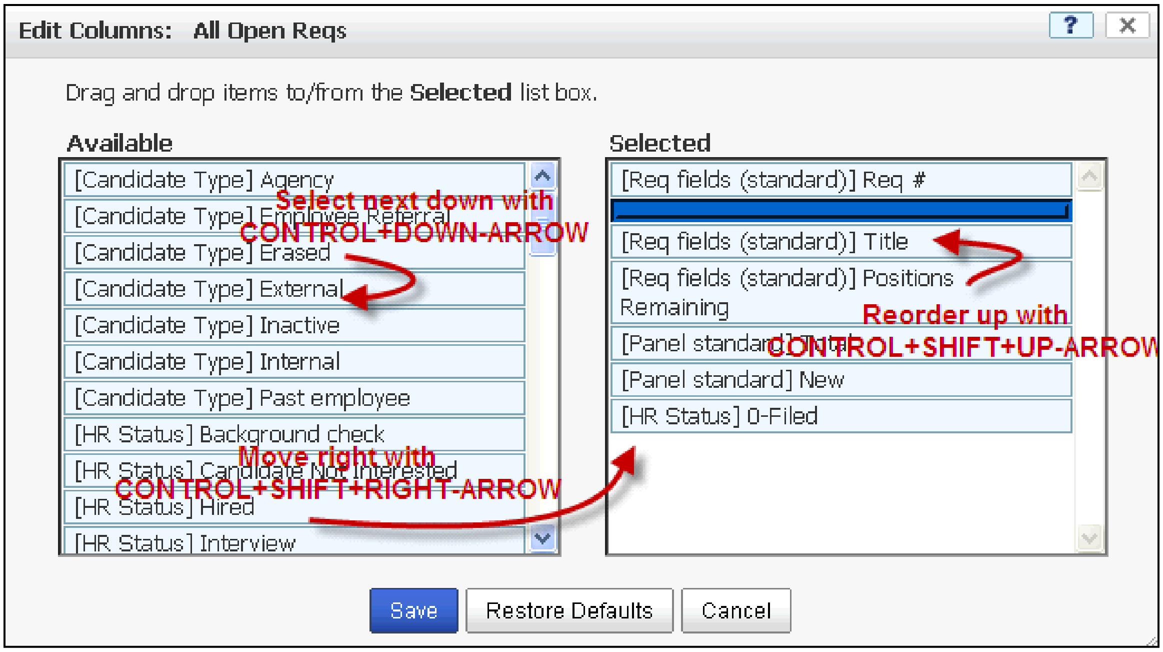


The menus follow the rules described above in the *Menus* section.

- TAB proceeds from header to body (left to right), then to footer.
- On closing a dialog box, focus returns to the panel's frame which contains the menu item that launched the dialog. Generally, the top-level menu-bar item will still be visible and receive focus. The actual submenu item that opened the widget will be hidden.

For the Edit Columns widget, the following applies:

- CTRL+ARROW selects items when the Available or Selected container has focus.
- CTRL+SHIFT+ARROW (⮌ or ⮎) moves items to the other container when the Available or Selected container has focus, unless the selected item is the blue pinning line.
- CTRL+SHIFT+ARROW (⮍ or ⮏) drags the items to reorder when the Available or Selected container has focus.



The following table summarizes the shortcut keys used by various elements in the New UI.

Keys	Panel	Menu	Submenu
TAB Moves focus left to right, top to bottom	To focusable elements in frame when panel has focus, e.g., Minimize icon	To menu/action item on panel	Navigates between both *enabled and disabled* menu items
SHIFT+TAB Moves focus right to left, bottom to top	To focusable elements in frame when panel has focus, e.g., Refresh icon,	To menu/action item on panel	Navigates between both *enabled and disabled* menu items
SHIFT+ARROW Moves focus in direction of arrow	To another panel frame	To another panel frame	To another panel frame
↑ or ↓ **Up/Down ARROW** Moves focus up or down	To another panel frame above or below	From top-level menu bar – displays corresponding submenu	**Cycles** through *enabled* submenu items only
← or → **Left/Right ARROW** Moves focus left or right		To next top-level menu (Actions, Filter, Display)	Opens sub-submenu corresponding to the current submenu item on a vertically-oriented submenu

Keys	Panel	Menu	Submenu
ENTER Performs implicit action of focus item	E.g., closes item when on Close icon Quick Links (QL) – expands/hides folders	From top-level menu bar – displays corresponding submenu	Opens sub-submenu corresponding to the current submenu item on a vertically-oriented submenu
SPACE	Grid “Selected Records” table – checks/unchecks boxes		
ESC Closes items	QL – closes a contextual menu opened when a QL link has focus	Closes menu	Closes a submenu and restores focus to its parent menu item
MENU or **SHIFT+F10**	QL – opens a contextual menu when a QL link has focus		

Keys	Page	HR Status Editor	Dialog/Widget
TAB Moves focus left to right, top to bottom	To menu/action items on page or within frames or on page	To HR Status editor options	To actionable items in box/widget from header to body (left to right), then to footer
SHIFT+TAB Moves focus right to left, bottom to top	To menu/action items within frames or on page, including browser controls or toolbars	To HR Status editor options	To actionable items in box/widget, and Help or Close icons
SHIFT+ARROW Moves focus in direction of arrow	SHIFT+↓ places focus on the top left or top right panel depending on whether focus in header is on the left side or right side.		
↑ or ↓ **Up/Down ARROW** Moves focus up or down		To HR Status editor options	
← or → **Left/Right ARROW** Moves focus left or right		Opens the submenu with focus (e.g. Advanced Options or View History)	

Keys	Page	HR Status Editor	Dialog/Widget
ENTER Performs implicit action of focus item	E.g., opens menu, opens link	Selects HR Status editor option with focus and closes dropdown	
SPACE			
ESC Closes items	E.g., closes menus, “undoes” typing in Quick Search	No effect – Focus on Cancel and press ENTER to close	No effect – Use Close control or focus on Cancel and press ENTER to close
CTRL+ARROW			Edit Columns widget – selects item when Available or Selected container has focus
CTRL+SHIFT+→ or **CTRL+SHIFT+←**			Edit Columns widget – moves items to the other container when the Available or Selected container has focus
CTRL+SHIFT+↑ or **CTRL+SHIFT+↓**			Edit Columns widget – drags the items to reorder when the Available or Selected container has focus

How Do Clients Get these Features?

These features are available automatically without configuration.

Kenexa 2x Mobile: Locale/Language Support Exclusions (Temporary)

This document outlines the exclusions in language support for 2x Mobile recruiter and candidate experiences. These exclusions are temporary; all features should display in the appropriate language/locale in the July 2010 timeframe.

Candidate experience

Page name/location	Type/Context	Word/phrase not translated	Additional details
Browser Window title	Text		
Job Openings – "Home"	Multiple results text	Results, Page	Text is followed by numbers
Job Details, Submit contact Information, Questions, Attached Form	Link	Back	
Job Details	Text with link	Apply to this job here	Default, customizable text – can enter custom translations through Workbench
Submit Contact Information, Questions, Attached Form, Confirmation	Link	Home	
System error messages	Error text	Various system error text	

Recruiter/Hiring Manager experience

Page name/location	Type / Context	Word/phrase not translated
Login	Button	Sign in
Login	Error message	Mobile access has not been activated. Contact your system administrator.
Login	Error message	Login was not successful. Try logging in via the non mobile URL or contact your system administrator.
Login	Error message	An error occurred loading the page. Try logging in via the non mobile URL or contact your system administrator.
Login	Error message	Password cannot be empty.
Login	Error message	Username cannot be empty.
Login	Disclaimer	Kenexa 2x Mobile is restricted to authorized users only. Access is logged and monitored. Use of the Site constitutes consent to monitoring. Kenexa BrassRing may immediately suspend or terminate access in the event of suspicious or unauthorized activity. Actual or attempted unauthorized access is subject to civil and/or criminal penalties.
Login	Labels	Username, Password

Login	Page title	Kenexa 2x Mobile
Login	Version stamp	v12.3
Mobile Header	Hyperlinks	Back, Home, Logoff
Candidate Listing	Data table column headers	Name, HR Status, Date
Candidate Listing	*Page [page numbers]*	Page
Talent Record	*[Phone #] (Home)*	Home
Talent Record	*[Phone #] (Work)*	Work
Talent Record	*[Phone #] (Other)*	Other
Talent Record	Hyperlinks	Add/View Notes, Move/Copy to Req/folder, Send Elink
Talent Record	Message	HR Status update successful.
Talent Record	Message	HR Status update failed.
Req Actions	*Close req [Req #: Req title]*	Close req
Req Actions	*Do you want to close [Phone #]?*	Do you want to close <req #>?
Req Actions	Label	All positions for req <req #> have been filled. Before the req can be closed the candidate(s) below must be updated to a final HR status:
View/Add Notes	*Notes for [candidate name]*	Notes for
View/Add Notes	Error message	You did not enter any note text.
View/Add Notes	Error message	Maximum note length exceeded.
View/Add Notes	Radio button labels	Public, Private
View/Add Notes	Data table column headers	Date, Added By, Details
View Full Note	*Note for [candidate name]*	Note for
View Full Note	Data table column headers	Date, Added By, Details
Send Elink	Labels	System users, Non-system users, Subject, Message
Send Elink	Checkbox labels	Include notes, Include HR status, Send as HTML attachment
Send Elink	Buttons	List, Send as HTML attachment
Send Elink	Error message	Enter a valid e-mail address.
Send Elink	Error message	Enter at least one 'To' recipient.
Move/Copy Candidate	Page Header	Move/Copy candidate to Req/folder
Move/Copy Candidate	Section Header	Action
Move/Copy Candidate	Radio button labels	Move, Copy
Move/Copy Candidate	Section Header	Destination
Move/Copy Candidate	Labels	Req, Working Folder
Move/Copy Candidate	Section Header	HR Status Options
Move/Copy Candidate	Labels	Retain current HR Status in destination, Start new HR Status in destination
Move/Copy Candidate	Buttons	Move/Copy, List

Move/Copy Candidate	Message	Candidate <name> has been successfully copied to the following destination(s):
Move/Copy Candidate	Message	Candidate <name> has been successfully moved to the following destination(s):
Move/Copy Candidate	Message	Candidate <name> already exists in the following destination(s):
Move/Copy Candidate	Error message	No valid destinations are available for this candidate.
ScaledSelect	Message	No results found.
ScaledSelect	Page Headers	Search reqs, Search System users, Search working folders
ScaledSelect	Label	Enter search criteria

Kenexa 2x Mobile™ – Recruiting Optimized for Mobile Devices

Kenexa 2x Mobile™ now brings the power of 2x BrassRing to mobile devices for candidates, recruiters, and hiring managers. 2x Mobile is not phone-specific and will support a range of mobile devices, including Blackberry, iPhone, Android, and Windows Mobile.

Date Available	US: 01/APR/2010 EU: 07/APR/2010
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☑ Workbench Self-Service ☑ New UI ☑ 2x BrassRing ☑ Talent Gateways ☐ Agency Manager ☐ Data Insight Tool ☐ SmartApproval
Visible Changes	☑ No – contact your CSC for implementation details. ☐ Yes – see the cumulative Visible Changes document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☐ Specific conditions required – see details below. ☑ Configuration required – see details below.

Benefits

Connects busy job seekers, recruiters, and managers when they are on the go.

Feature Description

2x Mobile™ now brings the power of 2x BrassRing to mobile devices for candidates, recruiters, and hiring managers. 2x Mobile is not phone-specific and will support a range of mobile devices, including Blackberry, iPhone, and others.

- Recruiters can review open requisitions and candidate Talent Records. From the Talent Record, the recruiter can update the candidate's HR status, as well as quickly contact candidates by phone or email using the contact information there.
- Hiring managers can review candidates' Talent Records and leverage pre-existing eLink functionality to approve job requisitions.
- Candidates can browse for jobs and apply to them from their mobile devices, without excessive data entry.

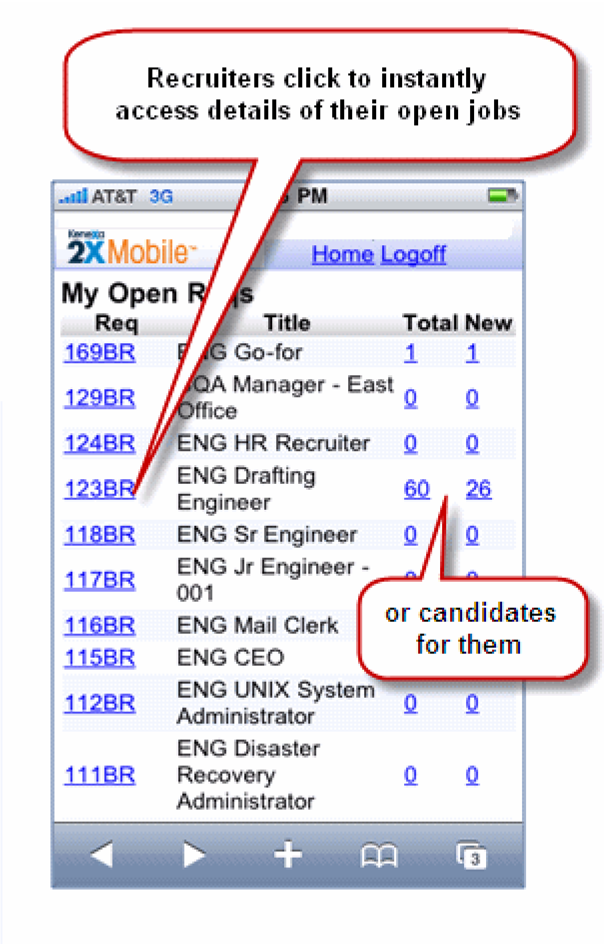
Recruiter Experience

Recruiters can log in to their URL for mobile access and get a quick pipeline view of their reqs and candidates on the My Open Reqs screen. From My Open Reqs, recruiters can:

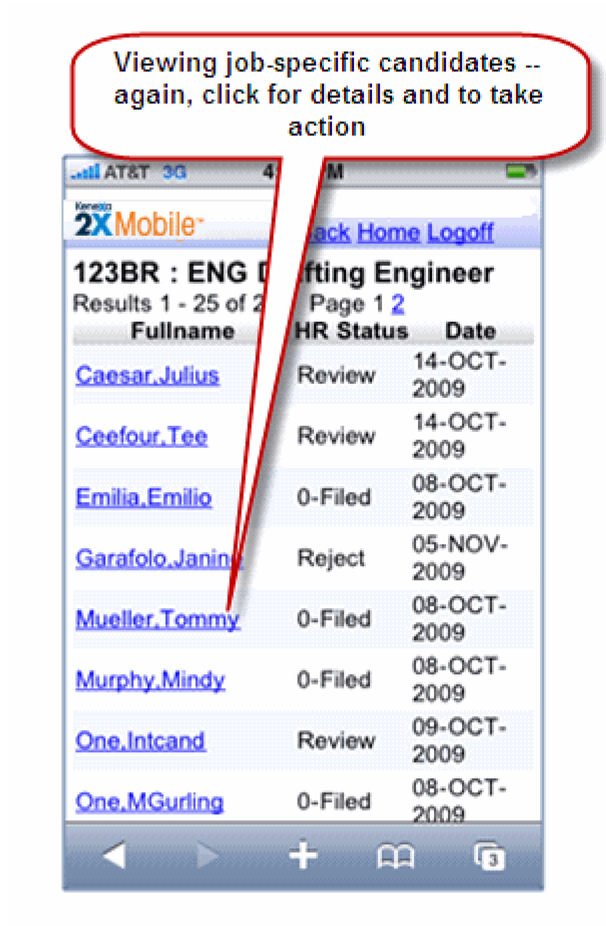
- View req details

- View current and newly-applied candidates
- Drill down to view details for specific candidates.

Access details



View job-specific candidates



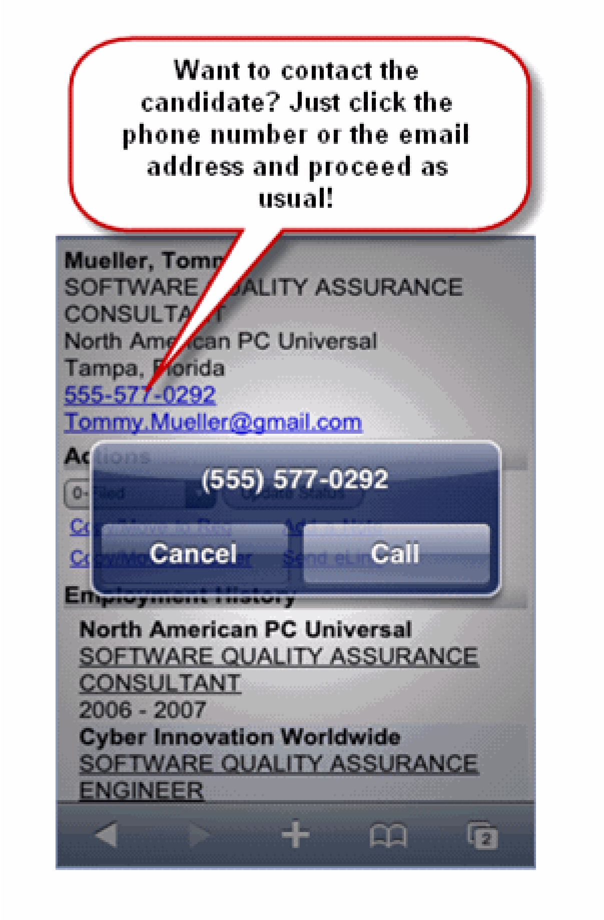
Viewing Talent Record details, recruiters and hiring managers can also click on the phone number or email link from a Talent Record, making contact so easy.

- 2x Mobile instantly retrieves candidate's phone number and dials it
- Or retrieves the email address for a quick message.

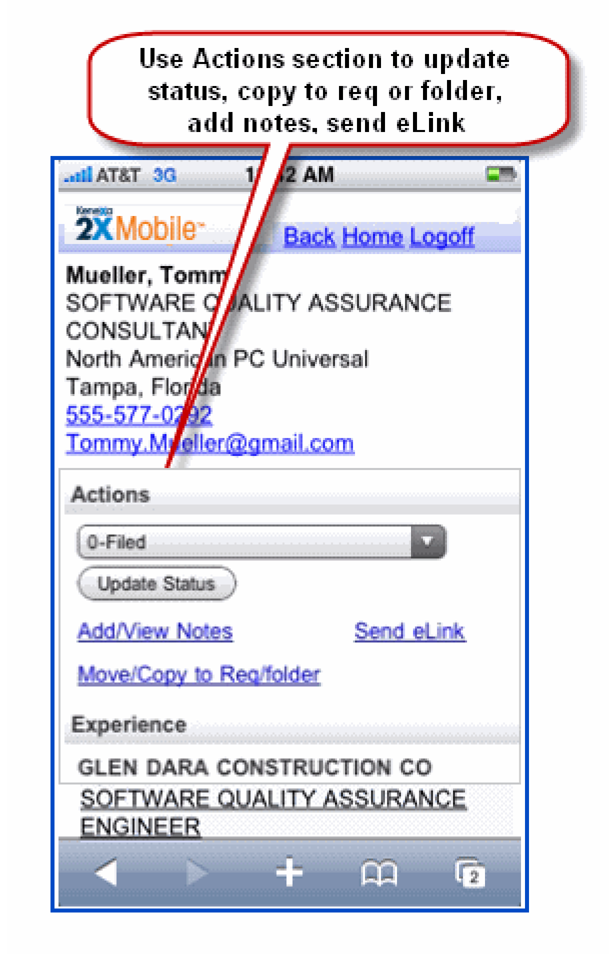
Recruiters can also advance them through the recruiting process:

- Update HR Status
- Copy or move to a Req or Folder
- Send an eLink
- View and add notes

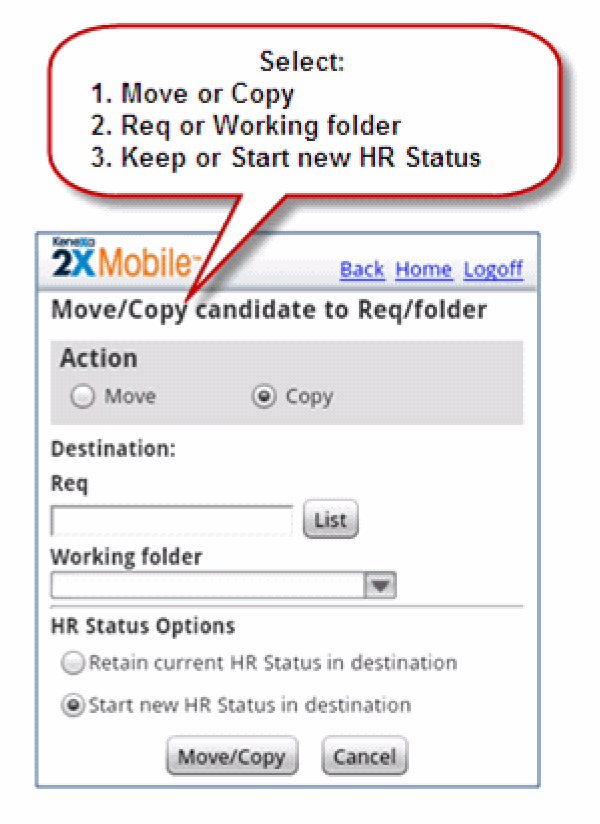
Contact candidate



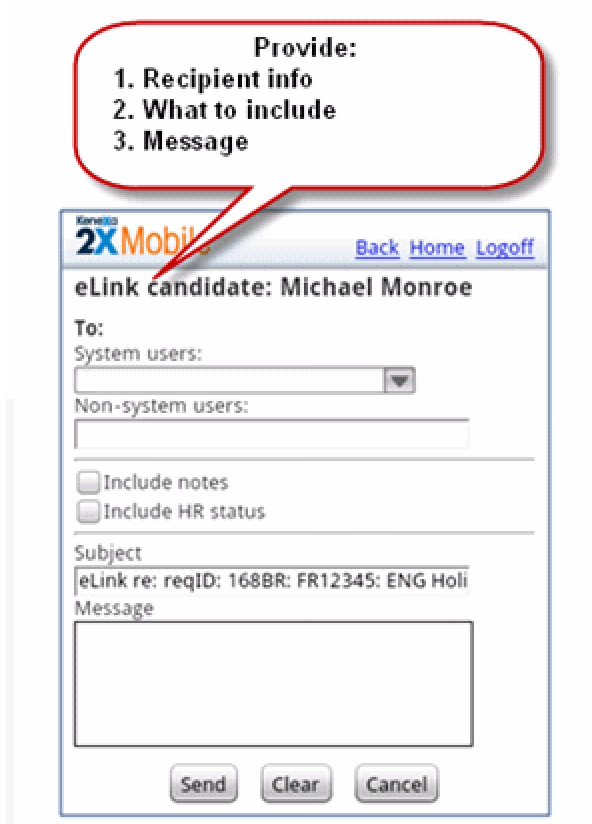
Actions



Move or Copy

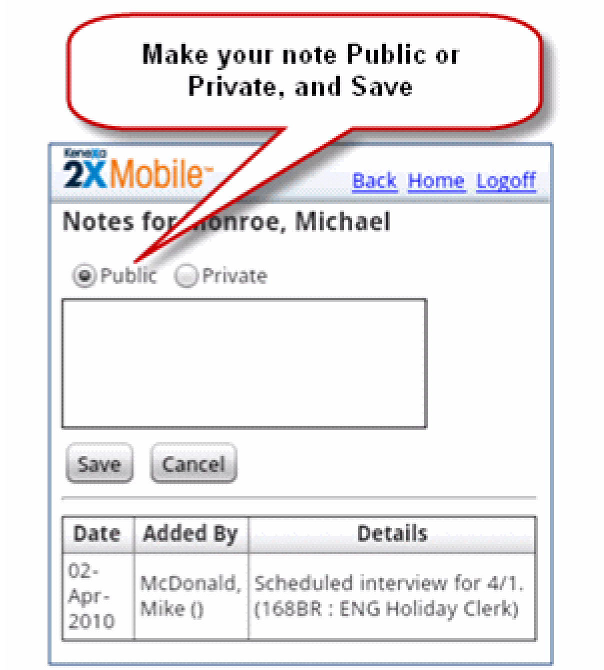


eLink



View and Add notes

Make notes Public or Private



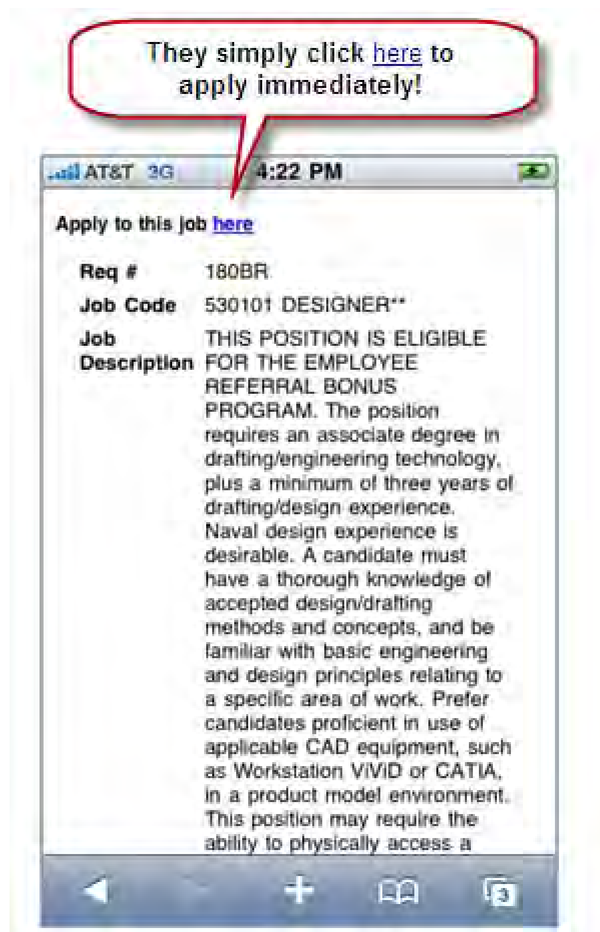
For all the functions of 2x Mobile, the 2x BrassRing user privileges are enforced as usual. For example, users without either **Candidates Notes – add private** or **Candidates Notes – add public** privileges will not see an **Add Note** link.

Candidate Experience

Candidates can view a list of jobs from your Talent Gateway, as well details for the jobs that interest them. Then they can apply immediately, from their mobile device. Market-leading EEOC data collection and compliance features are built-in. For their convenience, the data they must enter is kept to a minimum.

Browse jobs

Apply immediately



Limitations and Known Issues

Availability in supported 2xBrassring languages:

2xMobile is available in US English with many portions available in supported locales/languages. Full localization will be available in the July 2010 timeframe. For a list of portions that are not currently available in other locales, see *Kenexa 2x Mobile: Locale/Language Support Exclusions*.

System Requirements:

- Smart phone with Javascript enabled
- Blackberry with BOS version 4.6 or higher that have JavaScript support enabled

This functionality is intended as a subset of functionality available in the full 2x BrassRing and Talent Gateway systems in order to make it more usable via mobile access. Some examples of features intentionally limited or excluded are:

Recruiter experience:

- Columns displayed on the My Open Reqs and Candidate Listing pages are standard.
- My Open Reqs displays the most recent 50 reqs.
- Req Details is a summary and does not display all fields on the req.
- Talent Record is a summary that is similar to the “preview” functionality; it does not display the entire Talent Record or Resume.
- “Advanced options” for HR Status update of candidates are not available.
- Candidate forms and Integration messages tied to an HR Status update will not display (pop up) when the HR Status is updated.
- Many fields, such as HR Status and user names, will be truncated after 30 characters. Note text will be truncated at 200 characters on the View Notes grid but entire text is viewable on a separate page.
- Edit and Delete Note functionality is not supported through the Mobile Notes page.
- Not all fields will display on the send eLink page; such as: Cc/Bcc, Forms to view, Forms to complete, Notify me when the forms have been submitted.
- Not all fields will display on the Move/Copy to Req/folder page; such as: Destination: User Inbox, "E-mail all users with this candidate active" selection (therefore, no Move/Copy actions taken from Mobile Access will trigger an email).

Candidate experience:

- Columns displayed on the Job Openings home page are standard
- The Job Openings page will display the most recent 100 reqs posted
- Search for jobs
- Create an account
- Gateway Questionnaire questions and Assessments

How Do Clients Get this Feature?

This feature is controlled by new client settings. Please contact your CSC for more information about enabling this feature. Workbench users with tier 5 Certification can set up your mobile Talent Gateways.

Workbench Self-Service

Who does this: Certified Workbench User, Tier 5

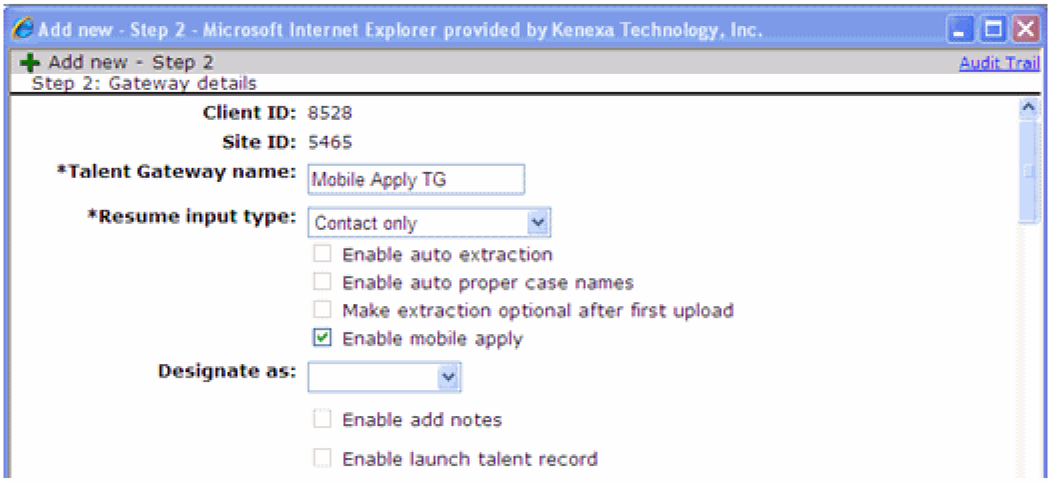
Summary information is included here. See the Workbench online help documentation (available in late May) for full information on self-service setup of Talent Gateways, using:

Workbench > Tools > Talent Gateways > Admin

Setting up a Gateway for mobile access (apply portion of 2x Mobile)

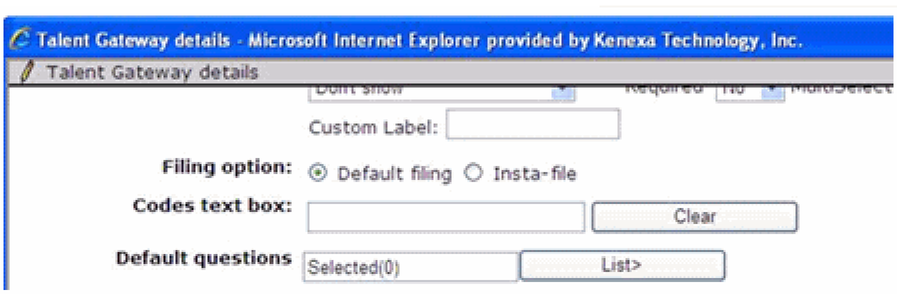
Basic Gateway subtype must be **Contact only**.

Select new attribute “Enable mobile apply.”



Once the new setting is selected, the following other settings will be affected automatically:

- **Enable narrow display for view resume and profile pages** will be checked and disabled
- **Use scaled-select for code display question** will be un-checked (if previously checked) and disabled
- **Resume input type** cannot be changed while the **Enable mobile apply** is selected



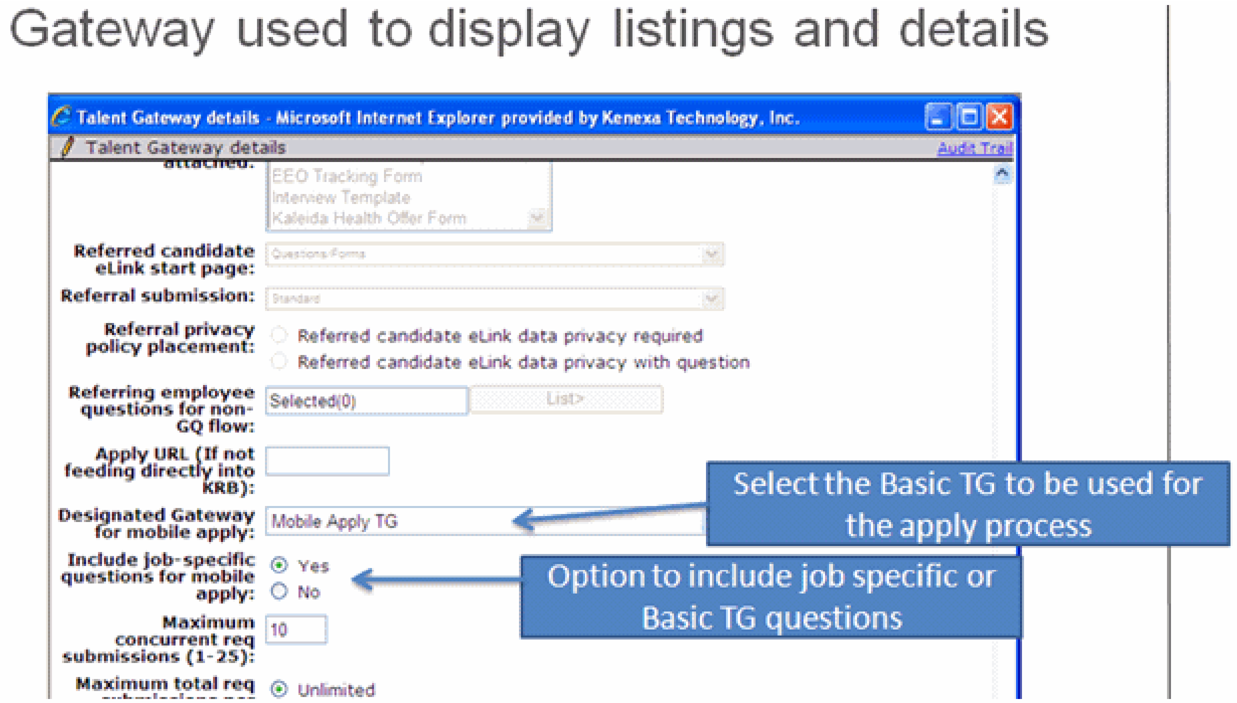
If specific questions are desired for the mobile apply process (as opposed to job-specific questions), select the default questions on this Basic Gateway.

The following other settings from the Basic Contact only Talent Gateway will be carried over to the mobile site as configured:

- Client logo (upload a very small logo suitable for viewing on a mobile device)
- Confirmation type
- Confirmation message
- Disclaimer
- Privacy statement
- Profile builder instructions
- Additional information page intro text
- Forms attached to Gateway
- Question and form field alignment
- Default questions
- Display of candidate form disclaimer
- Display of candidate form label type field

Set up the Full Gateway

This is the Gateway that will be accessed via the mobile device (job listings and details).



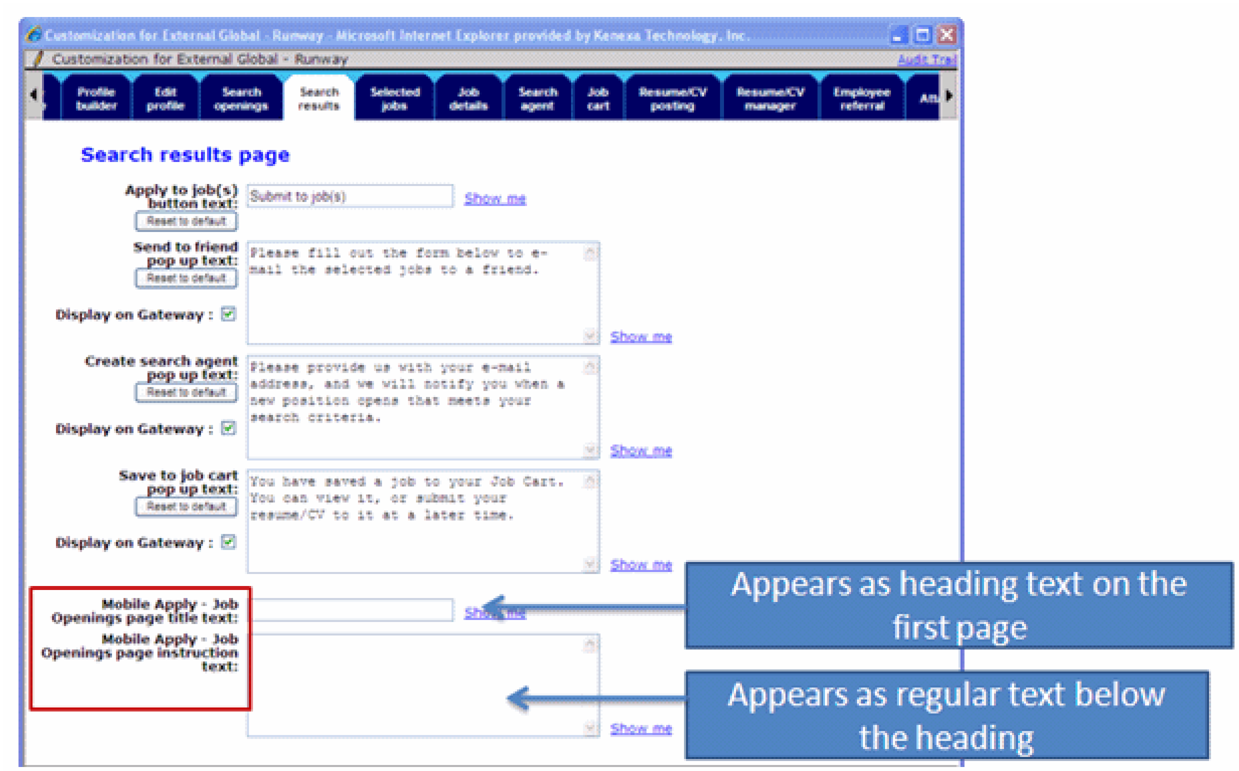
- Select the contact only basic gateway from the new field that has been enabled for mobile apply (only contact only ACTIVE gateways of the same LOCALE will display in the dropdown)
- If job-specific questions are desired, select yes for next new field
- For Global Gateways, these settings are enabled at the member site level

Note: Once a gateway is selected in the **Designated Gateway for mobile apply** dropdown and saved, that basic gateway cannot be inactivated and the “Enable mobile apply” setting will be grayed out. If you need to change or deactivate this gateway, it must first be deselected from this dropdown.

Customize text

New text customization fields are as follows (will appear via mobile access only):

Search Results Tab



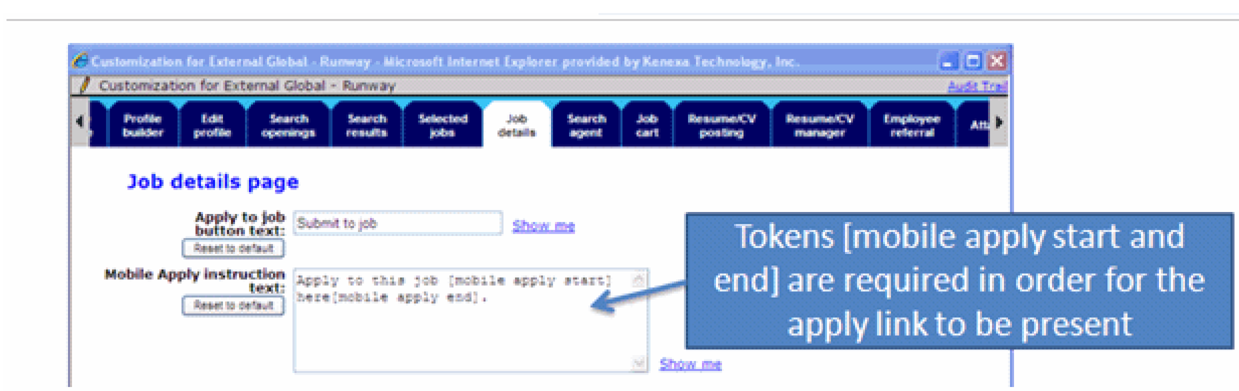
Title text:

- Character limit = 255, no HTML allowed
- However, the shorter the better since screen space on a mobile device is limited

Instruction text:

- Character limit = 4,000 – allows HTML
- The client should consider that longer text will require more scrolling on a mobile device.

Job Details tab



- If this is an existing gateway, the **Reset to default** button MUST be selected in order for the required tokens to appear.
- Can edit text around tokens, just DO NOT remove them or the mobile apply will not accept applications (there will not be an apply link on any jobs).
- Character limit = 4,000 – allows HTML
- The client should consider that longer text will require more scrolling on a mobile device.

Integrations: Kenexa Assessments

Several ease-of-use features have been added to improve the integration of Kenexa Assessments (also referred to as Searchable KAS) with Kenexa 2x BrassRing. These include enhancements for:

- Running assessments
- Allowing candidates to retake assessments
- Displaying results
- Batching groups of assessments

Product	☑ Workbench Self-Service ☐ New UI ☑ 2X BrassRing ☑ Talent Gateways ☐ Agency Manager ☐ Data Insight Tool ☐ SmartApproval ☑ Kenexa Assessments
Visible Changes	☐ No – contact your CSC for implementation details. ☑ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☐ Specific conditions required – see details below. ☑ Configuration required – see details below.

Feature Description

The integration of Kenexa Assessments (KAS) with 2xB includes enhancements in the following areas:

- Running assessments
- Allowing retake of assessments
- Batching groups of assessments to be taken within one session (via Talent Gateway apply, HR status update, Run Assessment)
- Displaying results
- Tokens for Automation Manager/Email Templates
- New assessment page to provides one point of access for candidate to access all pending assessments (June/July 2010)
- Reusing results—2xB will reuse existing assessment results if already on file for a different Req; candidate will only be sent link if assessment truly is required. (June/July 2010)

The following sections provide complete information for these enhancements.

Running Assessments

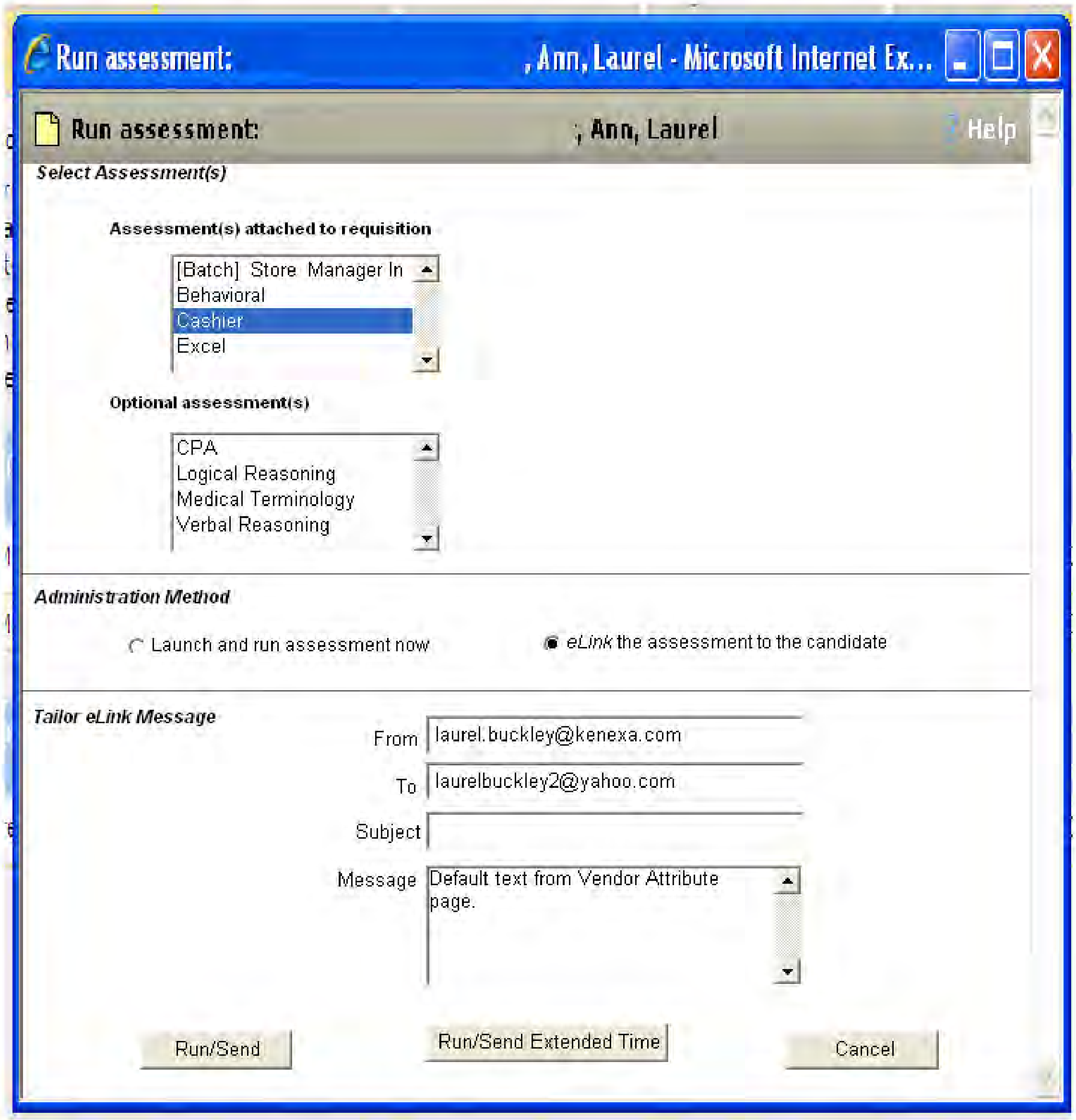
Improvements include:

- Streamlined process
- Configurable default eLink message for Run Assessment

- Choice of sending all assessments or selected assessments
- Choice of sending optional assessments, in addition to those tied to the req
- Time extensions for timed tests (mainly applies to tests when a candidate is entitled to extended time due to a disability)
- Site-score-independent testing with new Talent Gateway Admin setting: “Always launch assessment”
- Assessment presentation in TG iFrame

The **Run assessment** action on the req folder and Talent Record has been streamlined from a 4-5 page wizard-type process down to 1 page. Changes and improvements for that page include:

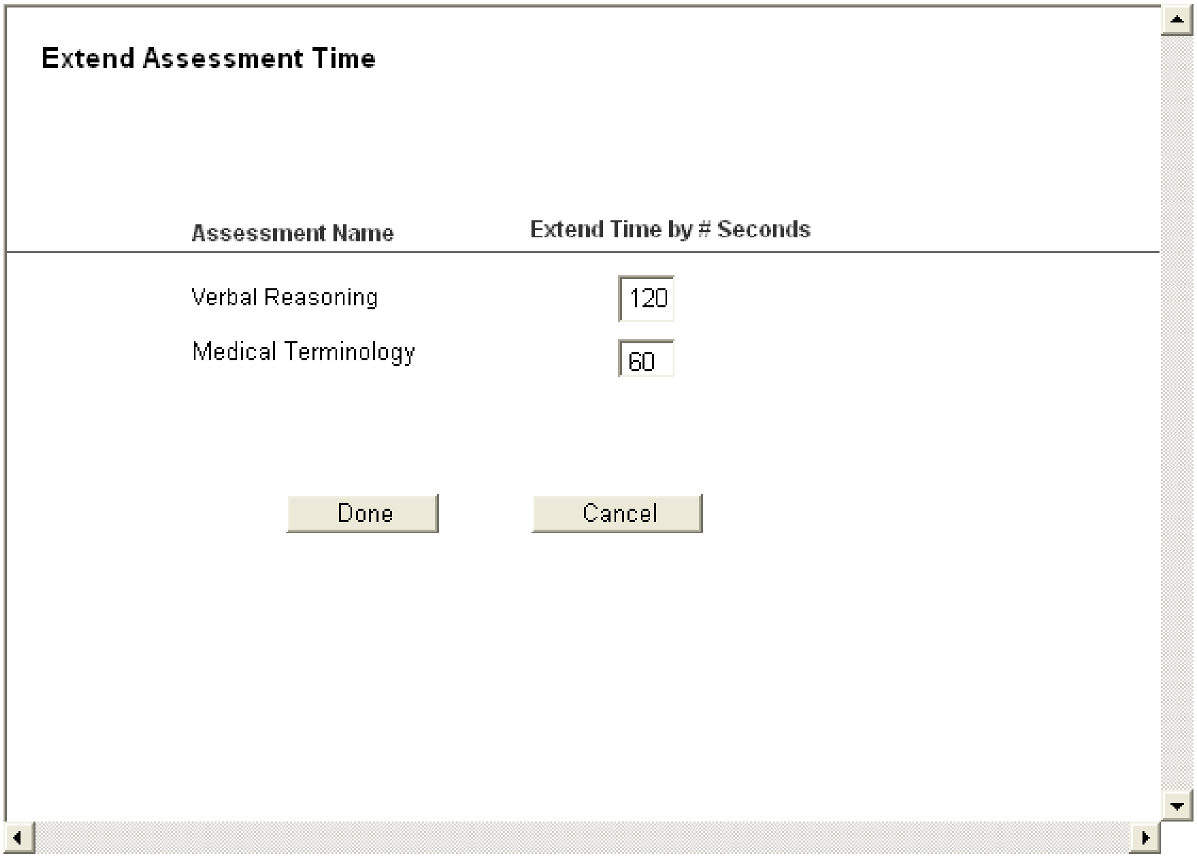
- **Default message and subject line** – Clients can now configure default message text in Workbench. The subject line is also pre-populated with the text “ReqID: Assessment Invitation”, expediting the user’s process.
- **Choose which assessments to send –** For clients using the **AttachAssessment Req** field to determine which assessments are required for the Req, users can now de-select those assessments that aren’t required at the time the invitation is sent.
- **Select Assessment batches –** For those clients who are using batches, **Run assessment** includes any assessment batches tied to the req.
- **Run Optional assessments** – Users with appropriate privileges can choose from the client’s full list of assessments in order to send invitations for assessments that are not specifically required for the requisition. This will typically be only used outside the US.
- **Run Extended time –** Users can now extend the allotted amount of time when legally required to do so for candidates. This is typically for candidates with disabilities such as dyslexia, and applies only to timed tests.



If **Launch and run assessment now** is selected, the user is taken directly into the KAS assessments system. If **eLink the assessment to the candidate** is selected, the eLink is sent to the candidate and the user is presented with a confirmation page.

Extended Time

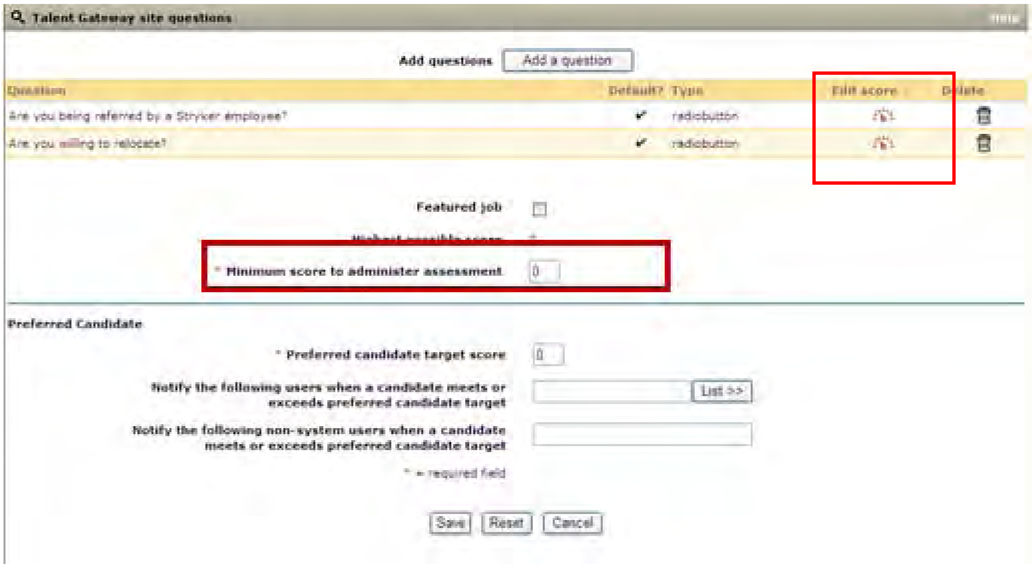
To run the test with extended time, click **Run/Send Extended Time**. Regardless of launch method, you're taken to the Extend Assessment Time page, where you can set the extension for each eligible assessment. Click **Done** when finished.



Always launch assessment Setting

Regardless of the candidate’s score on site questions, the assessment is always launched when the new Talent Gateway/Gateway Questionnaire setting **Always launch assessment** is enabled. Because the system will ignore the **Minimum score to administer assessments** field on the **Talent Gateway site questions** page (accessed from **Edit posting options** in 2xB), users do not need to enter a value for it when setting up the site questions prior to posting the req.

Talent Gateway site questions page



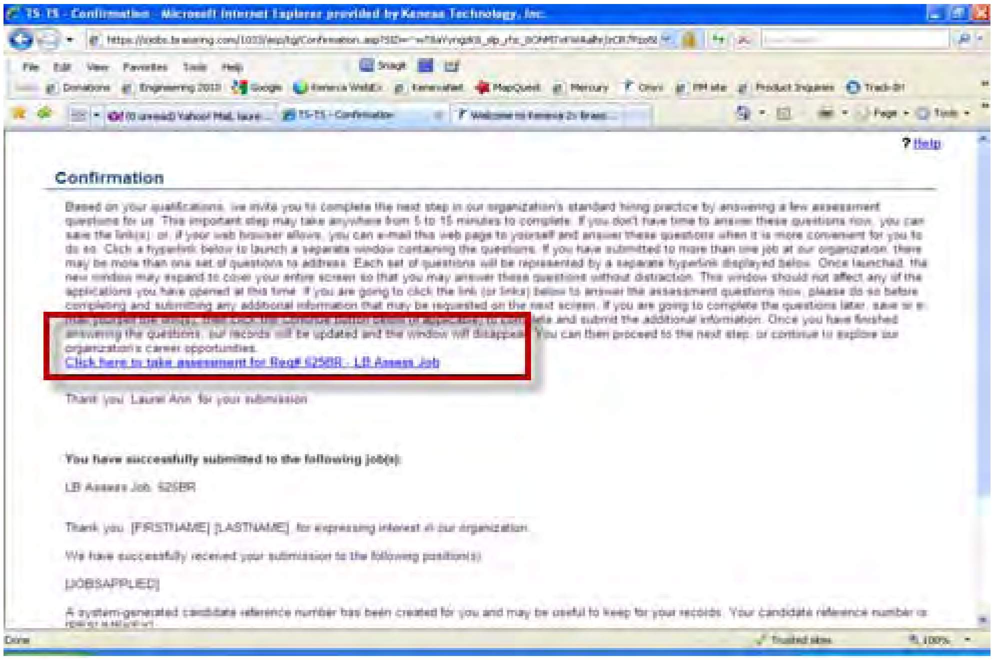
Important Note: If the "Always launch assessments" TG Admin setting is **NOT** enabled and you set a minimum threshold TG/GQ score for assessments, the Site Questions page **must be updated** with scored questions (or scored on the GQ) and a minimum score must be set. Otherwise, assessments will not launch when the **Minimum score to administer assessments** is left at zero.

Assessment Presentation in TG iFrame

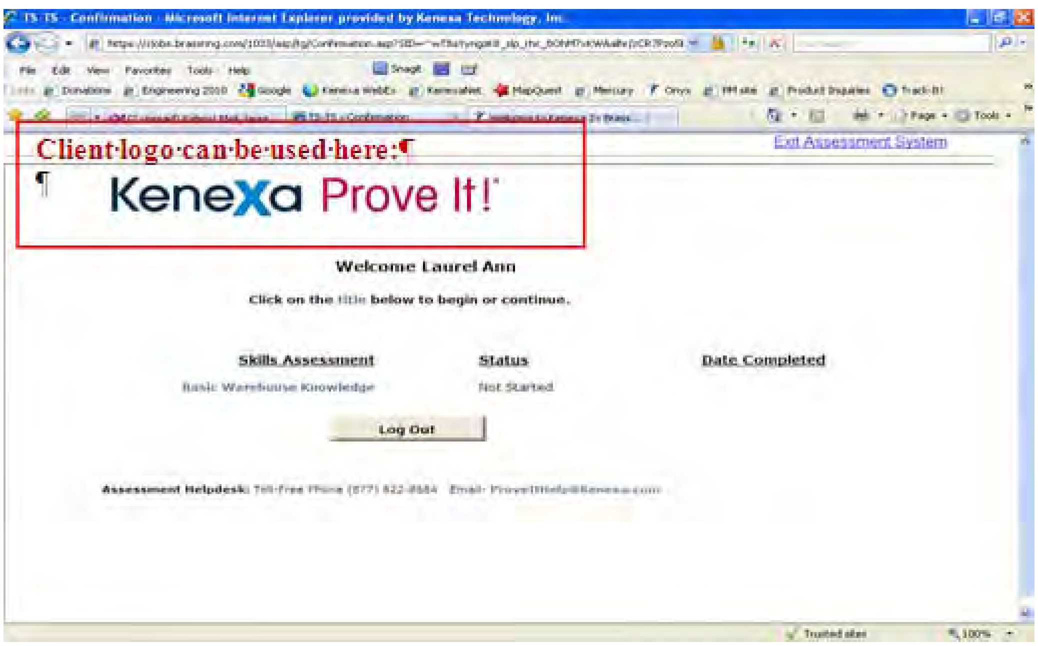
Rather than opening in a pop-up window, assessments are now presented to candidates in a Talent Gateway iFrame (HTML inline frame). This improves the candidate experience by not having multiple windows for the candidate to close, and makes it more clear to the candidate that the assessment is part of the application process.

Best practice: Use your organization's logo both on TG and in Assessments.

Confirmation page displays link to assessment



Candidate clicks the link and is redirected to the assessment via iFrame, within same browser.

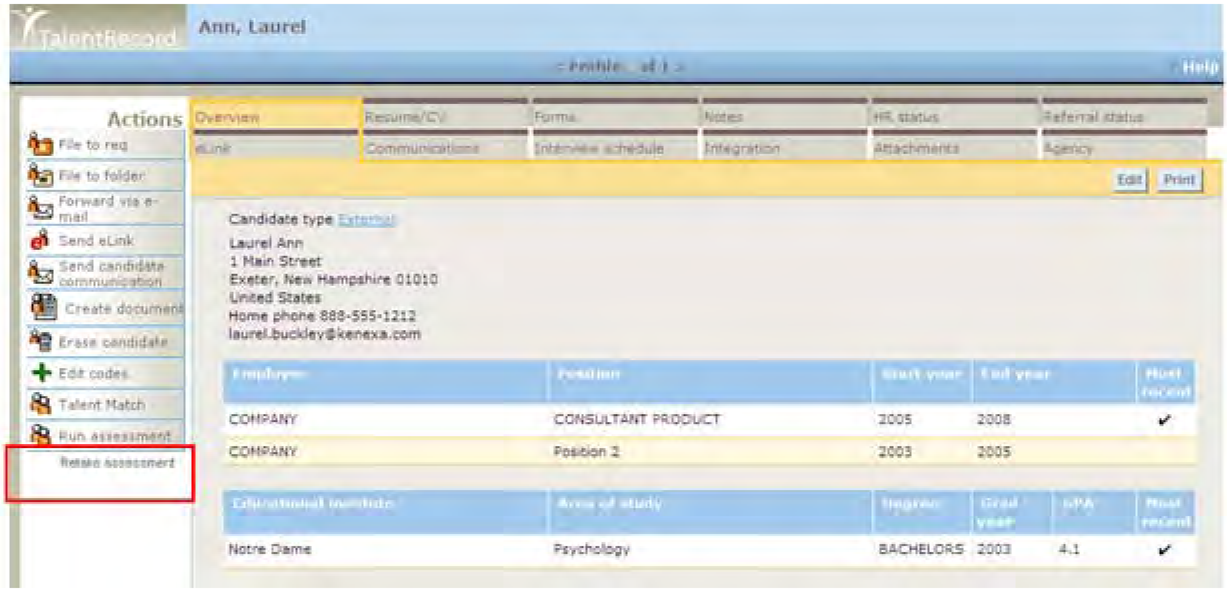


Allowing Retake of Assessments

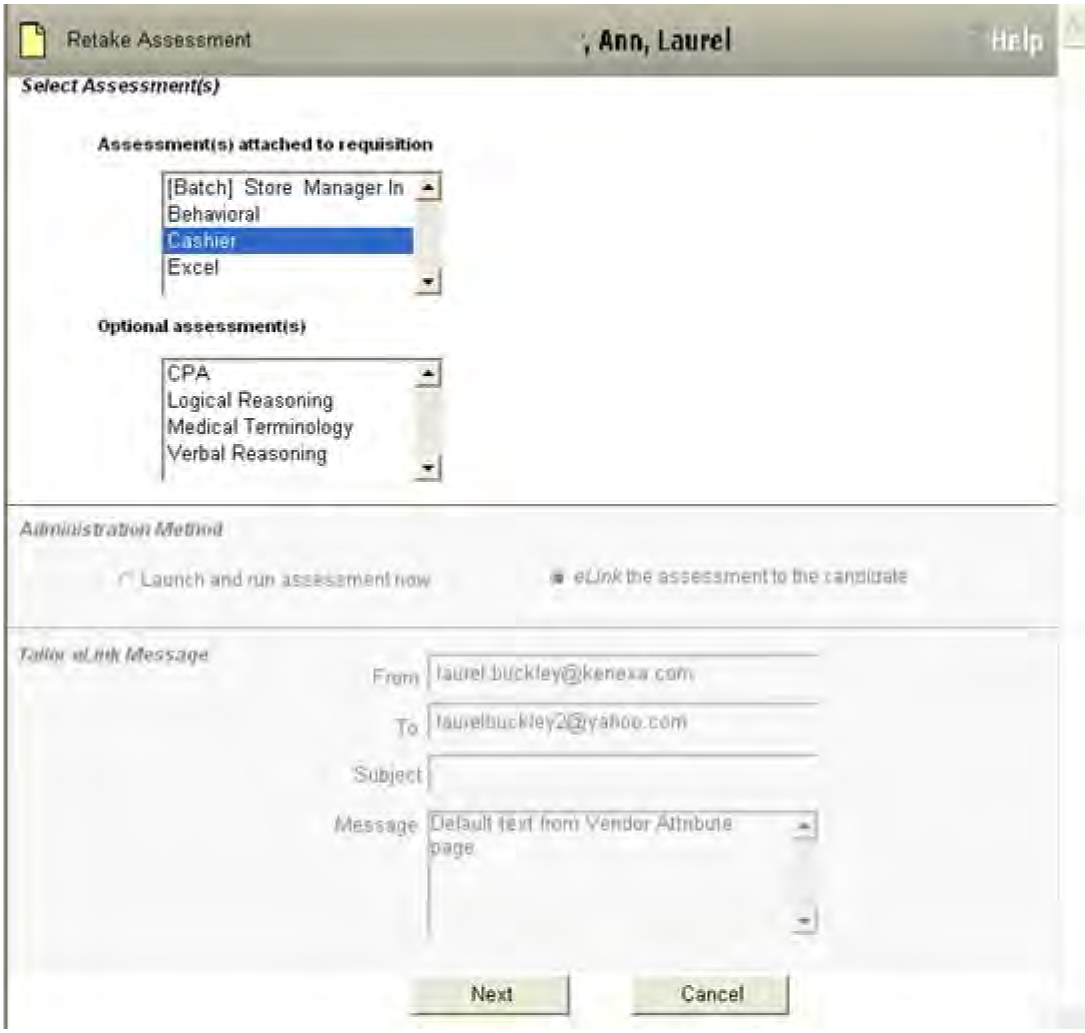
A new Req folder and Talent Record action in 2xB provides a way to reset the test so the candidate can take it again. The system removes the candidate's existing assessment forms and provides a fresh assessment request. The history of the original scores remains on the integration tab.

The retake currently applies only to the specific req for which it is requested.

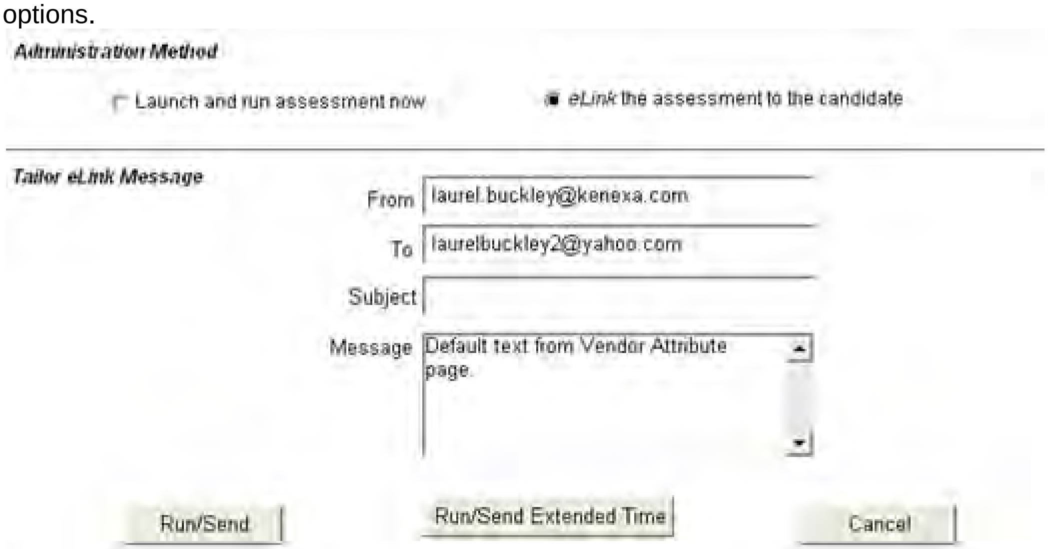
Best practice: This action requires the **Assessment – run retake** user privilege. It is strongly recommended that the privilege be limited to administrators.



1. Select one candidate and click **Retake assessment**.



2. Choose the batch or individual assessments to be retaken and click **Next**. (The only items available for selection are individual assessments that have been completed by the candidate and are not associated with a batch, and/or completed batches.) The screen refreshes with the remaining options.



3. Make any changes to the administration method and/or message and select the desired Run/Send button.

The candidate forms will be removed, but any score data is retained for historical purposes and will be visible on the Integration tab. The updated results will only apply to the specific Req from which the request was made.

Batching Groups of Assessments

A "batch" is a grouping of assessments that includes rules related to delivery and scoring. Assessments in a batch are given to a candidate within a single session. Batches can be used with any of the launch methods (TG apply, HR status update, Run Assessment)

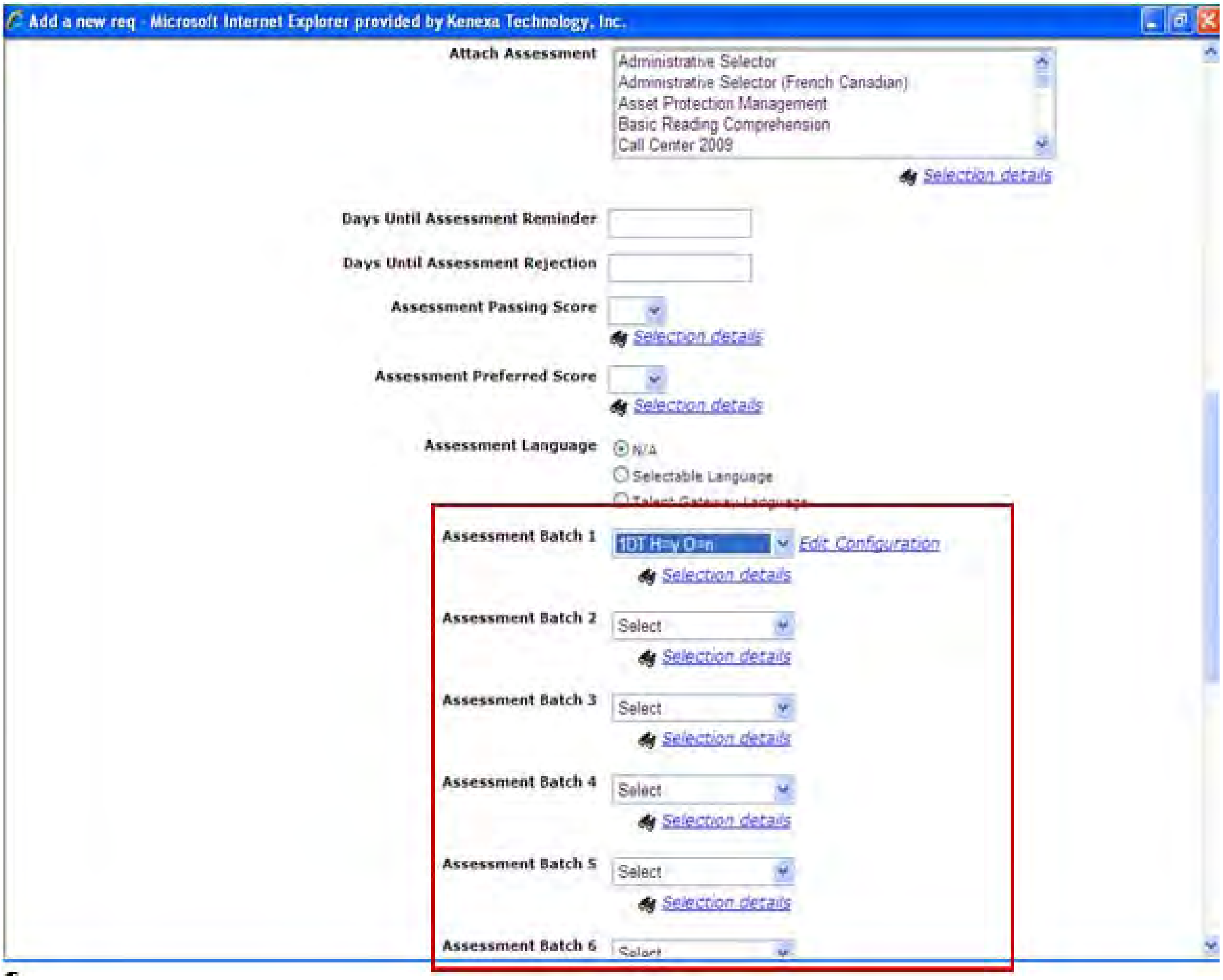
Functionality includes:

- Sequencing – assessments are given in the order defined for the batch. This improves the 2xB user experience by consistently displaying the same assessment on the Req grid for all candidates.
- Hurdling – you can set a threshold score for an assessment that will allow or prevent candidates from proceeding to the next assessment in the sequence based on their getting a passing or a failing score on the current assessment.
- Banding – ability to create custom, colored text in which to display the candidate's results. Clients can create up to 10 distinct bands, per assessment. Examples: **Passed** or **Do Not Proceed**.
- Overall Score – ability to create an overall score along with custom banding; based on a calculation of all assessments included in the batch.
- Batch assignment flexibility – batches can be assigned per Talent Gateway to allow different batches for internal and external candidates. You can also assign one batch to a TG for applications, and another for when candidates are into an HR status.
- Result band per assessment – each assessment within the batch can have its own band.

Selecting Batches for a Req

A new option allows 2xB users to select Assessment Batches for the req when adding or editing it. You can have up to six assessment batches, for which there are six corresponding custom req fields: Assessment Batch 1 through Assessment Batch 6.

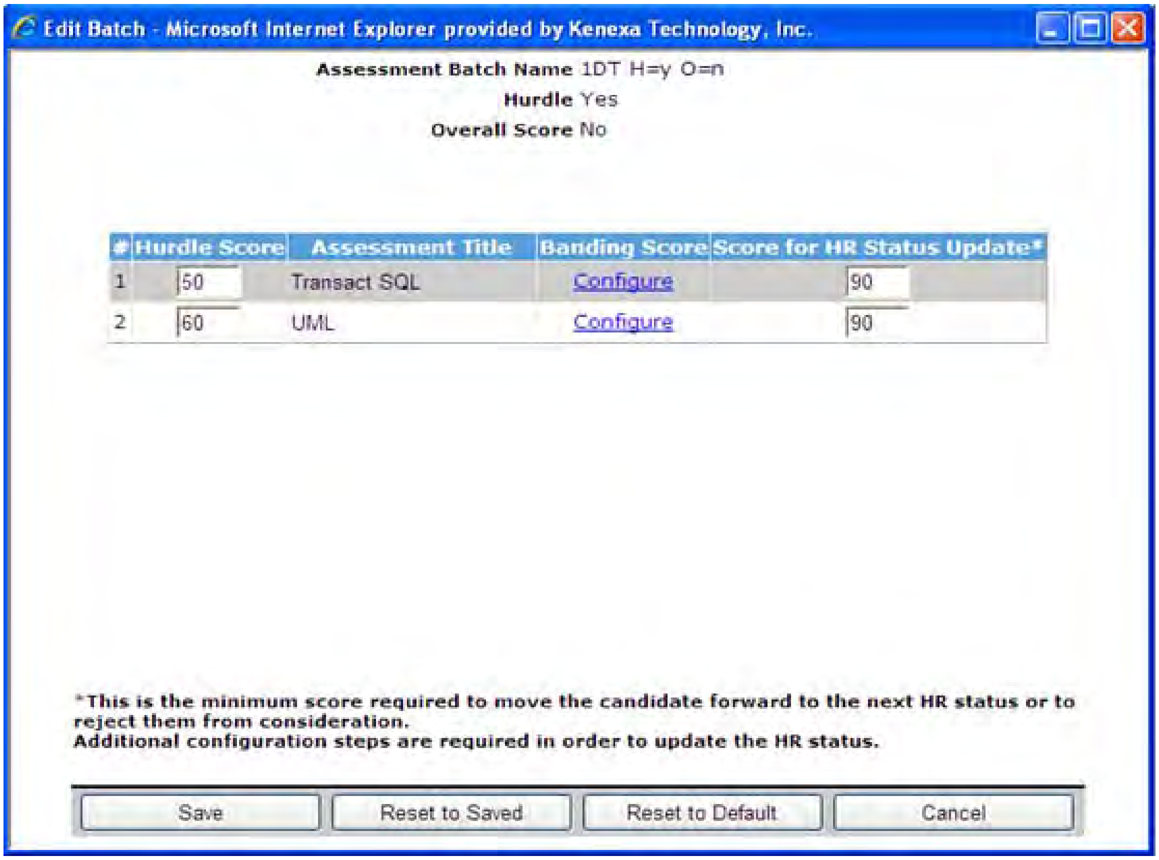
Best Practice: Use the batch field consistently across reqs, e.g., reserve Batch 1 for TG-Internal, Batch 2 for TG-External, Batch 3 for Invitation based on HR Status, etc.. Fields can be renamed for improved user experience. Batches can also be modified per req.



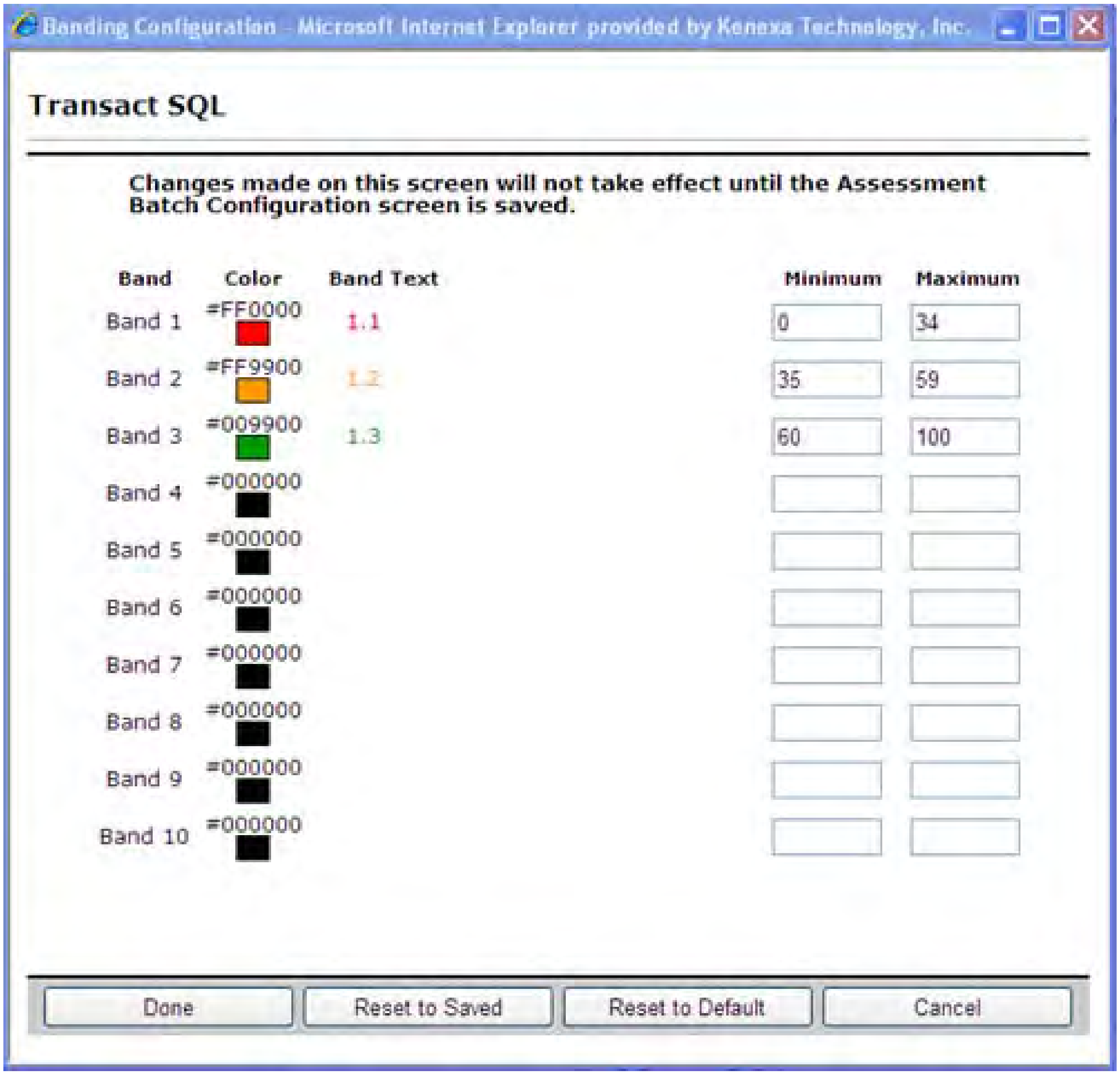
The exact fields available when users create a req depends on your organization's configuration. Assessment fields can be preselected through Job Code Default Data or Req Import. If preselected, they can be hidden on the Req to streamline the Req creation process and to ensure consistency of data.

Edit Configuration

Once a batch is selected the "Edit Configuration" link appears (for users with the **Assessment – batch configuration – Edit** privilege. Scores can be modified at the requisition level; the assessments included in the batch can not be modified. The **Edit Configuration** screen is presented in a pop-up window. The data elements on the screen will vary based on the batch configuration. For example, if Hurdling is not enabled, that column will not appear.

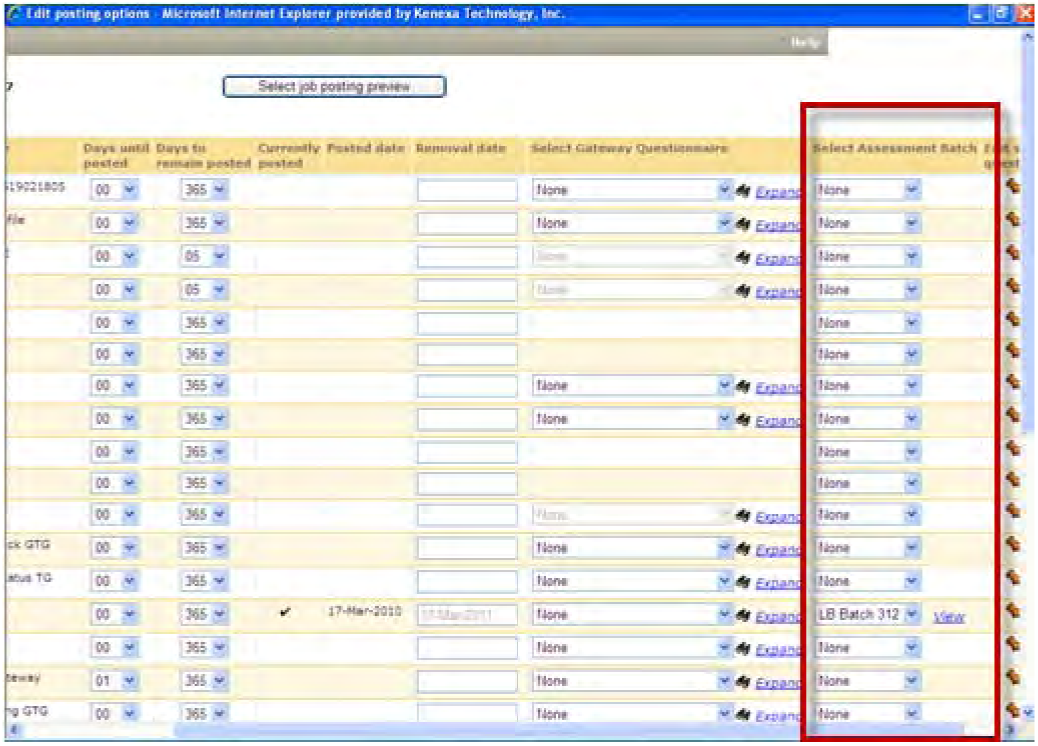


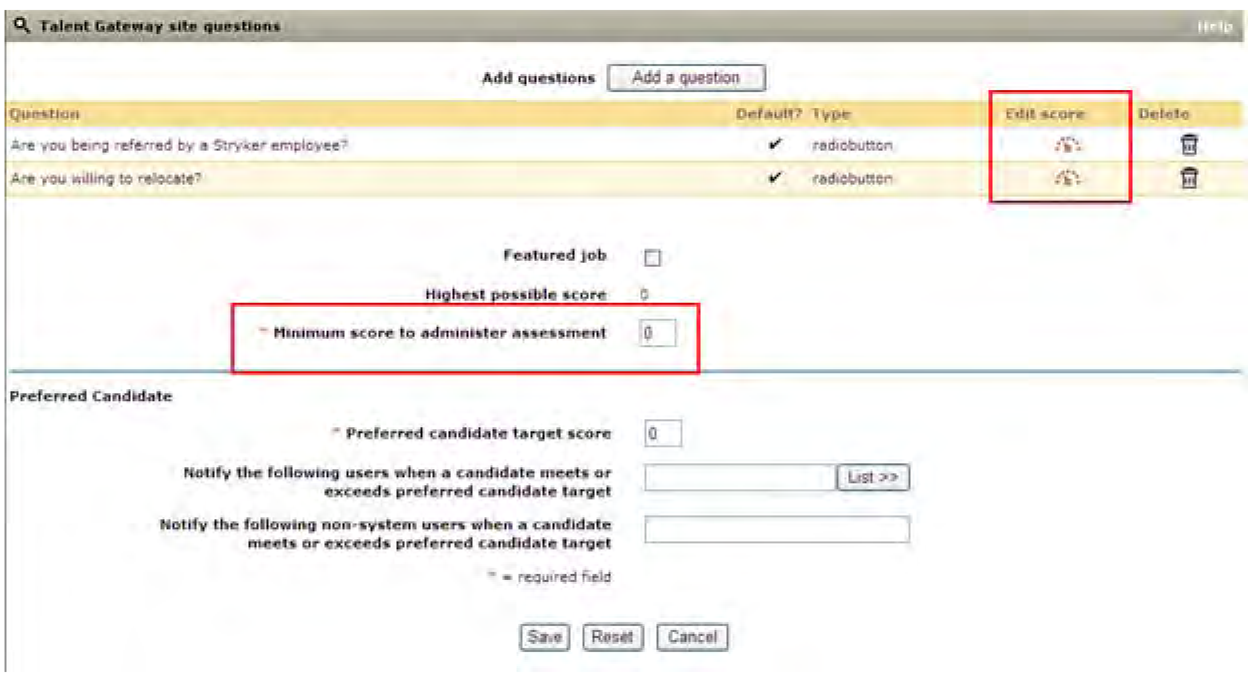
When you click the **Configure** link, an additional pop-up is presented. You can modify the banding cut scores but not the text displayed.



Selecting Batches per TG

For clients using the batch feature, the posting page includes a new column in which the user selects the Assessment Batch that will be launched for candidates applying on a particular TG. All batches attached to the requisition will be available for selection. This provides a way to enforce certain assessments for internal candidates but have a different set for external candidates.



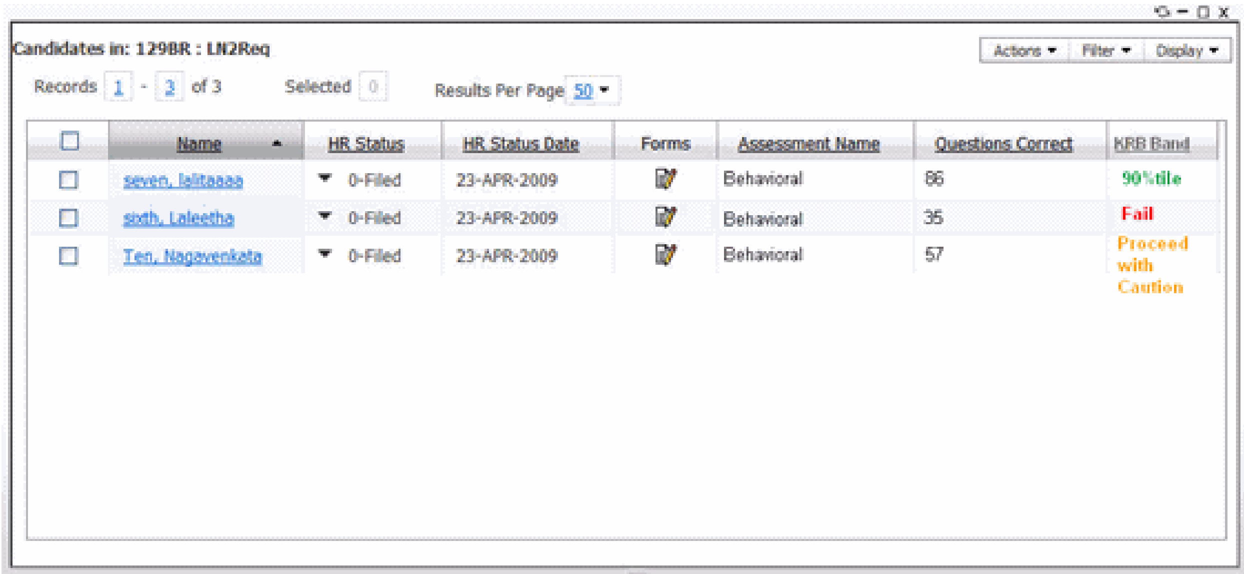


Displaying Results

Your organization can choose to customize the default look and feel for the display of Kenexa Assessments results in Kenexa 2x BrassRing. You can also customize text labels for assessments results—assessment scores are grouped into color-coded bands with customized labels. After the bands are configured, 2xB uses the assessment score(s) to assign candidates to those bands.

In addition, for assessment batches, the bands can be defined at the rReq level.

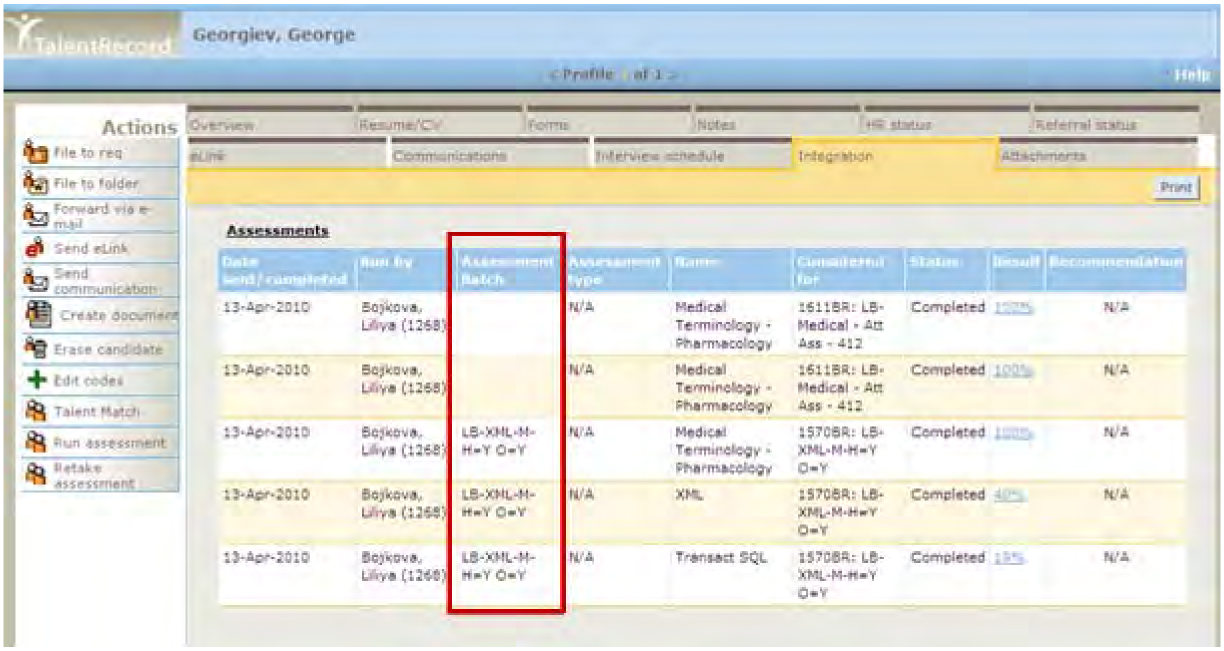
New UI Assessment Results Display



Classic UI Assessments Results Display

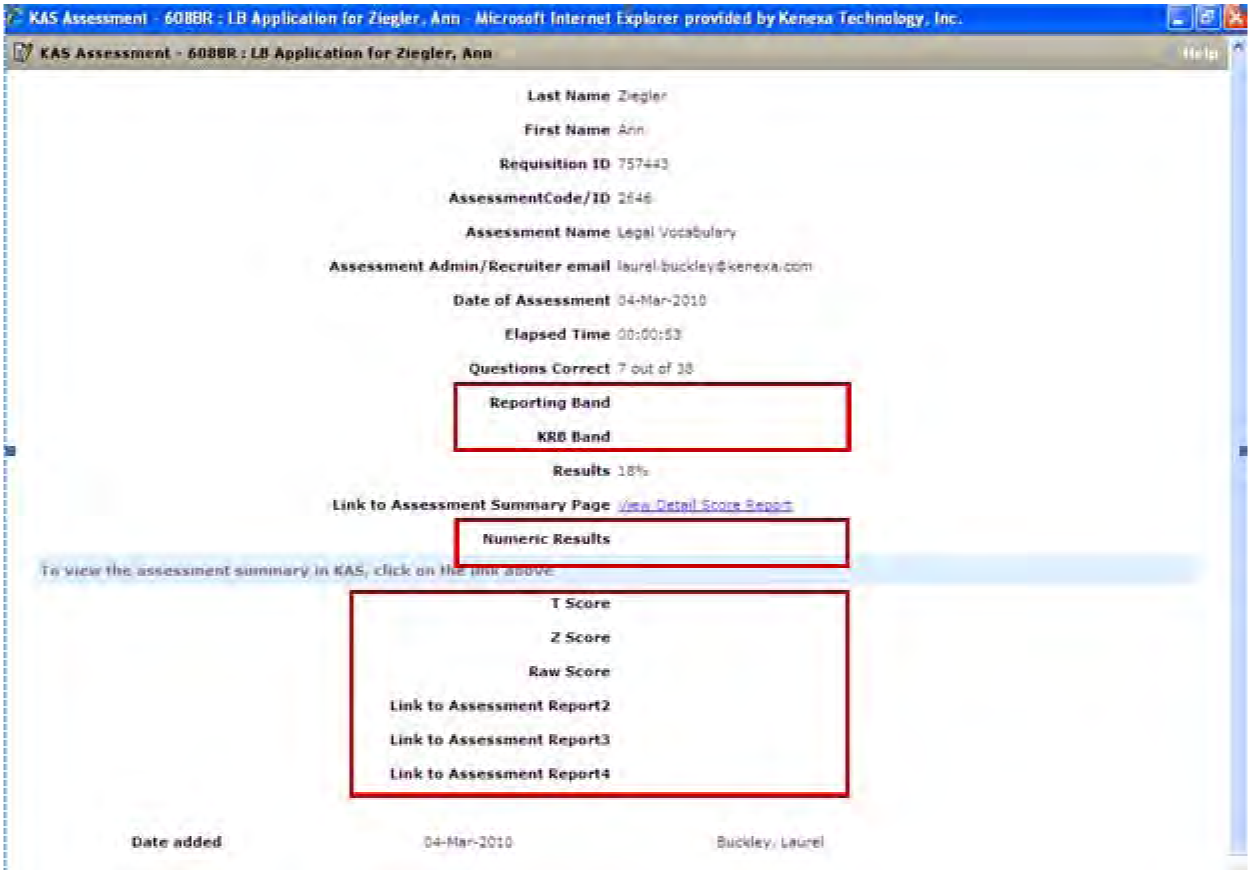
When batch functionality is enabled, the **Integration** tab shows Assessment Batch name (for users with the **Assessment – view history** privilege to access the tab). This helps tie together which assessments were required as part of one request.

Integration tab Assessments Results Display



When available, additional assessment result data is returned to 2xB and displayed on the results form, and these fields can be made outputable. All new fields are delivered 'hidden' for the client base locale, so must be enabled to be visible.

Assessments Results Form

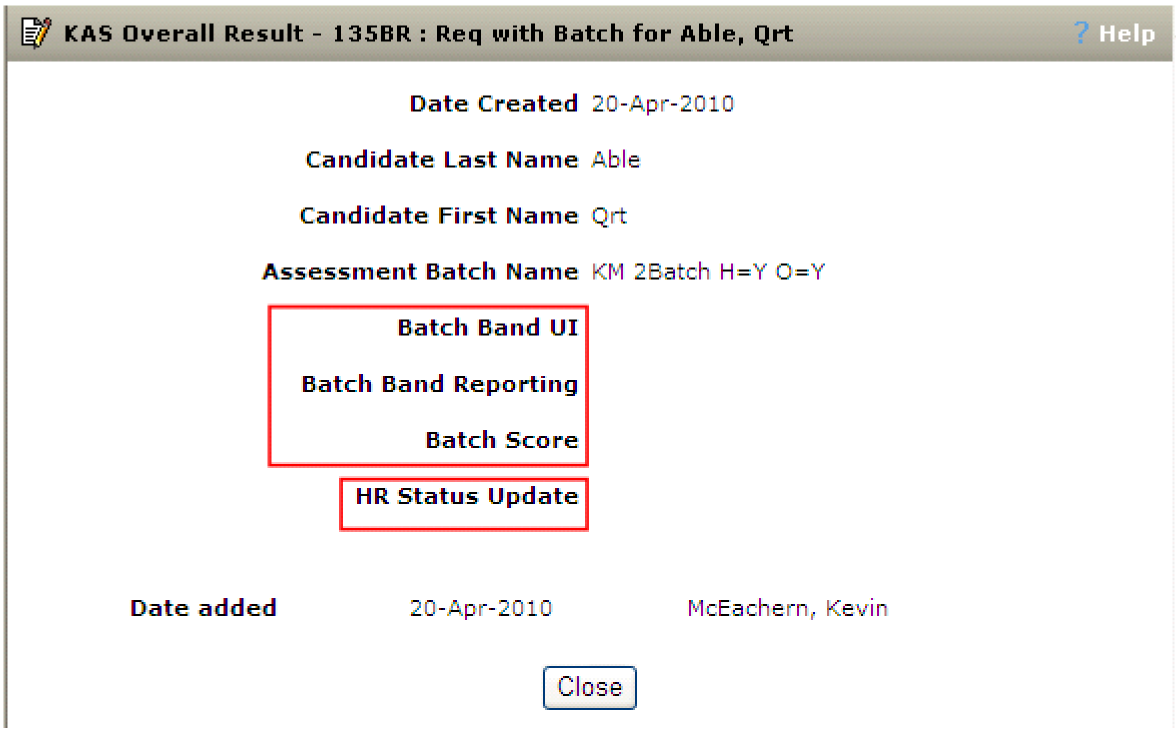


- <u>Reporting Band</u> – If using banding to create custom text for results, this field is displayed in black and white for reporting purposed, in order to ensure there are no html tags in the report.
- <u>KRB Band</u> – if using banding, this field should be used for the Req grid to display the text in color.
- <u>Numeric Results</u> – this field contains just the numeric value of the results. In the example in the preceding figure, if the Results field displays 18%, the numeric results displays 18. This can be made outputable to assist with sorting of data.
- <u>T Score, Z Score, Raw Score</u> – these are all additional data elements that may or may not be available for specific assessments. Typically, these values are used by psychomatricians. They are available in 2xB as part of calculating a batch's Overall Score. Use them only under instruction of an Assessment Consultant.
- <u>Link to Assessment Report 2, 3, 4</u> – these fields are available for clients that have custom assessment reports they want to make available to system users.

Overall Results Form

An Overall batch score/overall result can be calculated and stored on new KAS Overall Result form. This new form is created for clients using assessment batches.

Overall Results Form for Batched Assessments


KAS Overall Result - 135BR : Req with Batch for Able, Qrt ? Help

Date Created	20-Apr-2010
Candidate Last Name	Able
Candidate First Name	Qrt
Assessment Batch Name	KM 2Batch H=Y O=Y
Batch Band UI	
Batch Band Reporting	
Batch Score	
HR Status Update	

Date added	20-Apr-2010	McEachern, Kevin

Close

- Batch Band UI, Batch Band Reporting, Batch Score – these fields are populated when the "Overall Score" functionality is used with a batch. Automation Manager triggers can be created to update the candidate's HR status based on these fields.
- HR Status Update – this field is populated with either Yes or No when the "Score for HR Status Update" is used with a batch. Automation Manager triggers can be created to update the candidate's HR status based on this field.
- Candidate Did Not Pass Hurdling – if hurdling is enabled and the candidate did not proceed to complete all tests due to not passing the hurdle threshold, the form is created but results data is not populated. Automation Manager triggers can be created to update the candidate's HR status based on all results fields being blank.

Limitations and Known Issues

Banding configuration is not applied retroactively to already existing assessments. For example, if an assessment has a configured band that displays "Proceed with Caution" in yellow and the banding configuration is subsequently updated to display status text in orange, the status text for existing assessments that have scores will still display in yellow.

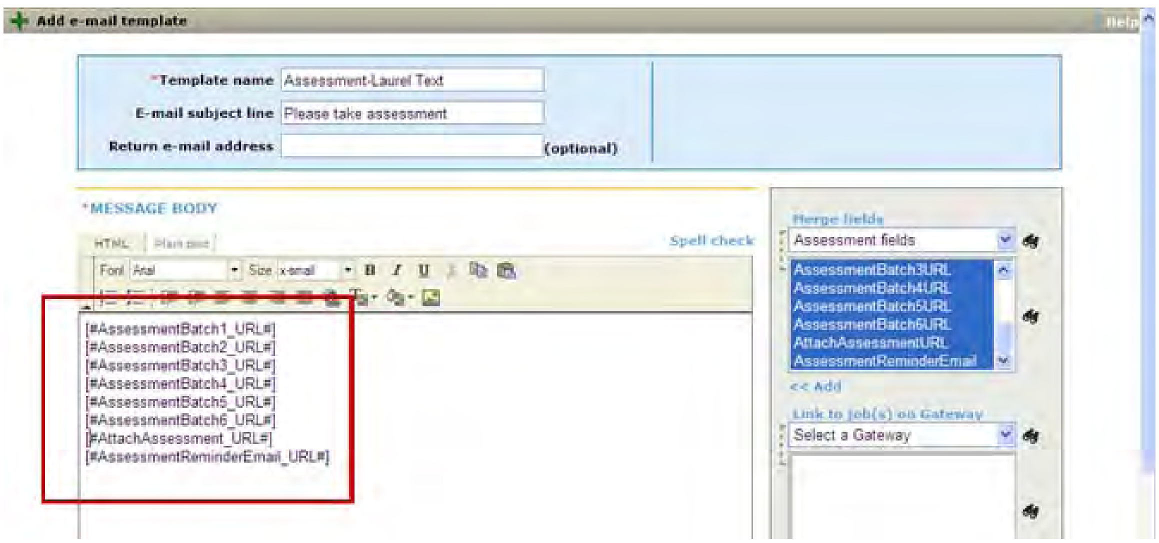
If KAS is currently configured to send results wrapped in html for your site, this implementation must be stopped prior to using configured banding in your live environment.

Tokens for Automation Manager/Email Templates

New merge tokens that can be used with Automation Manager for **Assessment Email Reminder** and **HR Status Update – Notify Candidate** and **Send Communication** from req folder are available. Each token will create a link that always brings the candidate to the Assessment page on the Talent Gateway. However, each token has distinct functionality that determines which assessment the candidate is invited to take:

- AssessmentBatch 1_URL# – will invite the candidate to take the assessments required for whatever batch is selected on the req for the Assessment Batch 1 field
- AssessmentBatch2-6URL# – same as above for the appropriate batch
- AttachAssessment_URL# – used if the Attach Assessment field is being used at the req level rather than the batches
- AssessmentReminderEmail_URL# – use with the Automation Manager – Assessment Reminder Email.

These fields are listed alphabetically in the **Candidate fields** variable group on the Merge fields selection lists in 2xB when adding or editing email templates (via **Admin -> Communications -> Add email template** and **Edit email template)**.

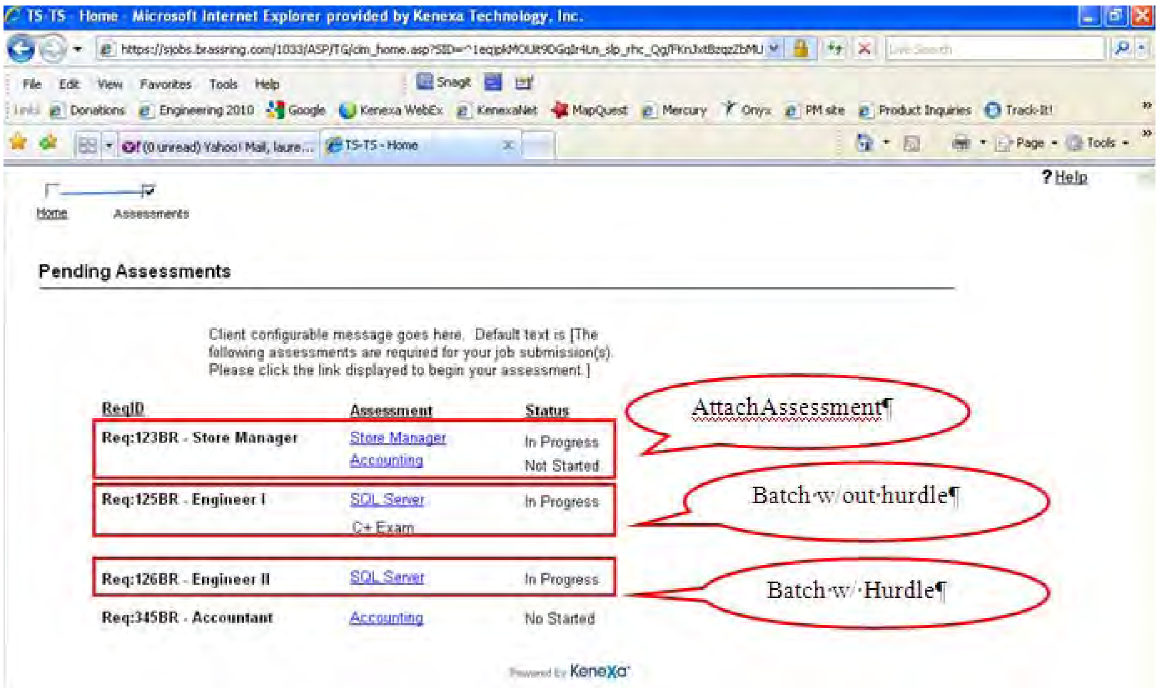


Best Practice: It's recommended that each Assessment Batch field (1-6) on the req be used for a consistent purpose. For example: always reserve Batch1 for attaching to the Internal TG, reserve Batch 2 for attaching to the External TG, reserve Batch 3 for automatically inviting Internal candidates to assessments once they reach a specific HR Status, etc. This helps ensure the correct batch is being sent at the correct time. Templates can be titled using a similar naming convention, e.g., "Assessment-Internal-HR Status Update" would include the batch 3 token.

New Assessment Page (to be available June/July 2010)

The new page will provide a single point of entry for all required assessments. Candidate's can log into the Talent Gateway and will see **Assessments** as one of their options. The candidate will also be routed to the page via the link that is eLinked to them. When a candidate applies for jobs requiring assessments, rather than displaying an assessment link for each job application on the confirmation page, the page presents just one link (this can also be replaced with the "Launch Assessment via Continue Button" option). In all cases, they will be brought to the Assessment page, which will display any outstanding assessments for each requisition for which they have applied. Once all assessments are completed, the requisition information will no longer be displayed on the page.

Additionally, the page will display only outstanding assessments. Before presenting an assessment link, the system first will determine whether valid results are already on file, if so, those results will be copied to the new requisition and the candidate will not be required to take any action. For assessment batches, the system will also determine which assessment is the next in sequence and ensure only that assessment has an active link on the assessment page. Additionally, if the batch is using hurdling, the system will determine whether the candidate received a passing score, if not they will not be invited to complete the next assessment.



Using Existing Results (to be available June/July 2010)

With this coming functionality for the Run Assessment action, 2xB will determine whether valid results are already on file for the candidate within a different req. If so, the results will be copied for the new req. The candidate will only receive an eLink request if results are missing, and the link will redirect the candidate to the new TG Assessment page. If all results are available, the system will block the generating of the eLink and notify the 2xB user that results have been copied into the new req.

How Do Clients Get this Feature?

Contact your Kenexa consultant for help with this feature.

Workbench Self-Service

Who does this: Certified Workbench User, Tier 1 and above

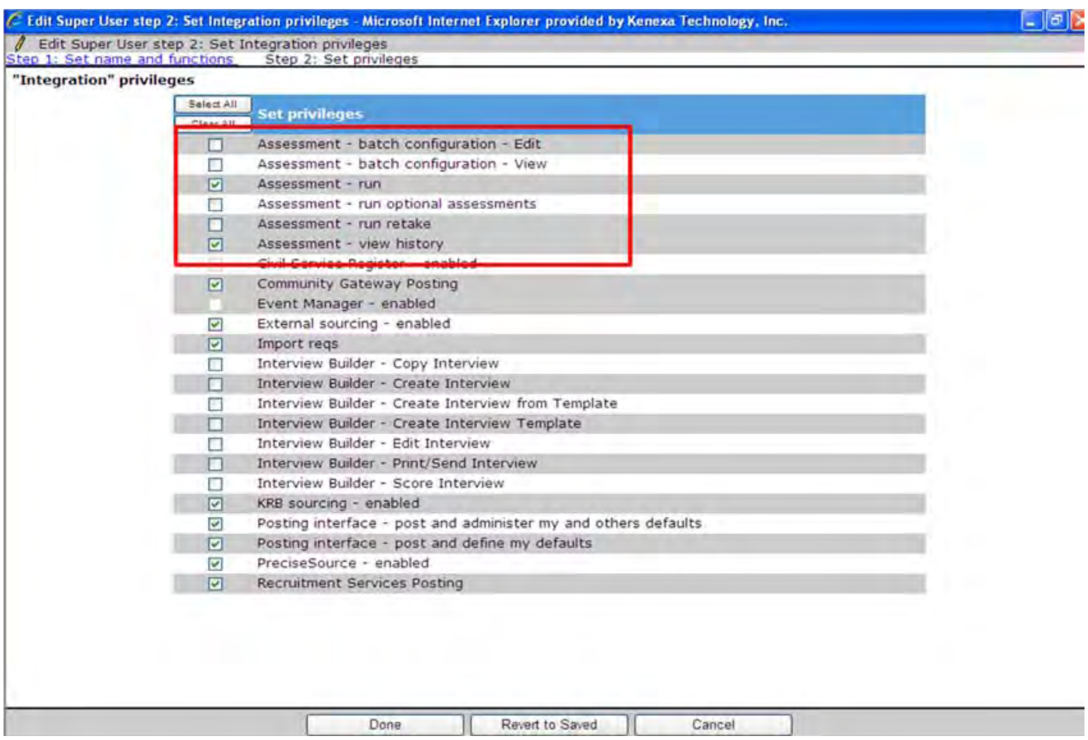
Certified Workbench users can perform these tasks as necessary (generally, if changes or additions are needed), but Kenexa Service Consultants will assist with initial KAS setup.

- Assign assessments-related user type privileges
- Add custom req fields to req forms
- Configure candidate forms
- Administer Talent Gateway launching options for Assessments
- Customize Talent Gateway text
- Add assessment widget to Gateway Questionnaire(s)

User Type Privileges

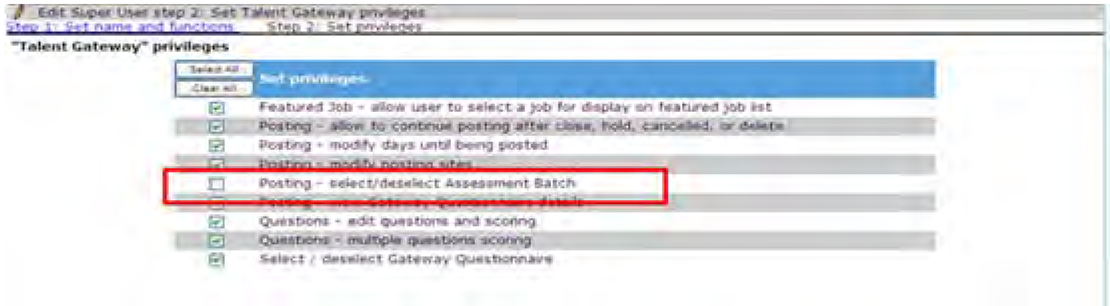
You can set the following assessments privileges in Workbench **Users > User types > Edit type permissions > Set privileges** (for Function = **Integration**):

- **Assessments – run**: user type can run assessments
- **Assessments – run optional assessments**: can choose from the client's full list of assessments in order to send invitations for assessments that are not specifically required for the requisition.
- **Assessments – run retake**: can allow candidates to retake assessments
- **Assessments – batch configuration – Edit**: can edit the batch configuration when adding a req
- **Assessments – batch configuration – View**: can view the batch configuration when adding a req
- **Assessment – view history**: can access the Integration tab to view assessment history



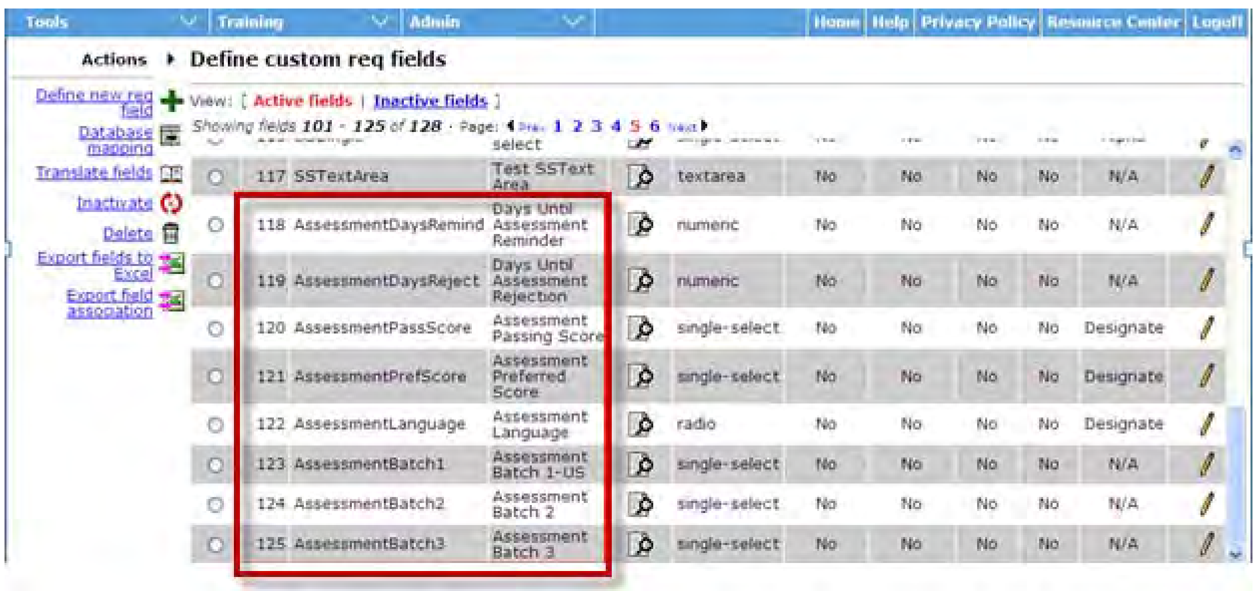
Additionally, when assessment batches are in use, you can set the following assessments privilege in Workbench **Users > User types > Edit type permissions > Set privileges** (for Function = **Talent Gateway**):

Posting – select/deselect Assessment Batch: user type can select which Assessment Batch will be launched when candidates apply on a particular Talent Gateway.



Custom Req Fields for Req Forms

You can add custom req fields for req forms as needed in Workbench **Tools>Forms>Reqs>Req forms>Define custom req fields**.



AttachAssessments – this field displays all client assessments. It is best suited for environments without complex rules, ideally when only a single assessment is required for a req and all candidates, both internal and external, are required to take the assessment

AssessmentLanguage – this field determines whether the candidate must take the assessment in the locale of the gateway they've applied to (when the assessment is available in that locale) or if they will have the option to select the language of their choice. When the field is not present on the req, the system defaults to allowing candidates to select the language of their choice. As part of this functionality, only English titles for assessments will be displayed in 2xB and attached to the requisition. KAS determines which version of assessment will be given to the candidate, based on the req setting.

AssessmentPassScore (used only with AttachAssessments) – this field is used in tandem with the AttachAssessments field and Automation Manager Assessment trigger "Scoring Results." This is best when only one assessment is required for the req, or, if multiple assessments are required, they share a similar cut score.

AssessmentPreferScore (used only with AttachAssessments) – same as above but candidate can be updated to a unique HR status based on having a preferred score rather than a passing score.

AssessmentDaysRemind – This is available for both AttachAssessments and for batches, and uses Automation Manager – Assessments-> Reminder Email. Candidates who have not completed ALL required assessments in the #days set per Req are sent a reminder email.

AssessmentDaysReject – Same as above. In this case the candidate is automatically updated to a new HR status if they do not complete all their assessments within the designated timeframe.

AssessmentBatch1 (only)
AssessmentBatch2
AssessmentBatch3
AssessmentBatch4
AssessmentBatch5
AssessmentBatch6 – If enabled for batches, up to 6 distinct batches can be attached to an individual requisition. This provides flexibility around launch methods. For example: Batch 1 may be the set of assessments required for external candidates when they apply on the TG, Batch 2 may be a different set that is required for internal candidates, Batch 3 may be for all candidates that move into a certain HR status.

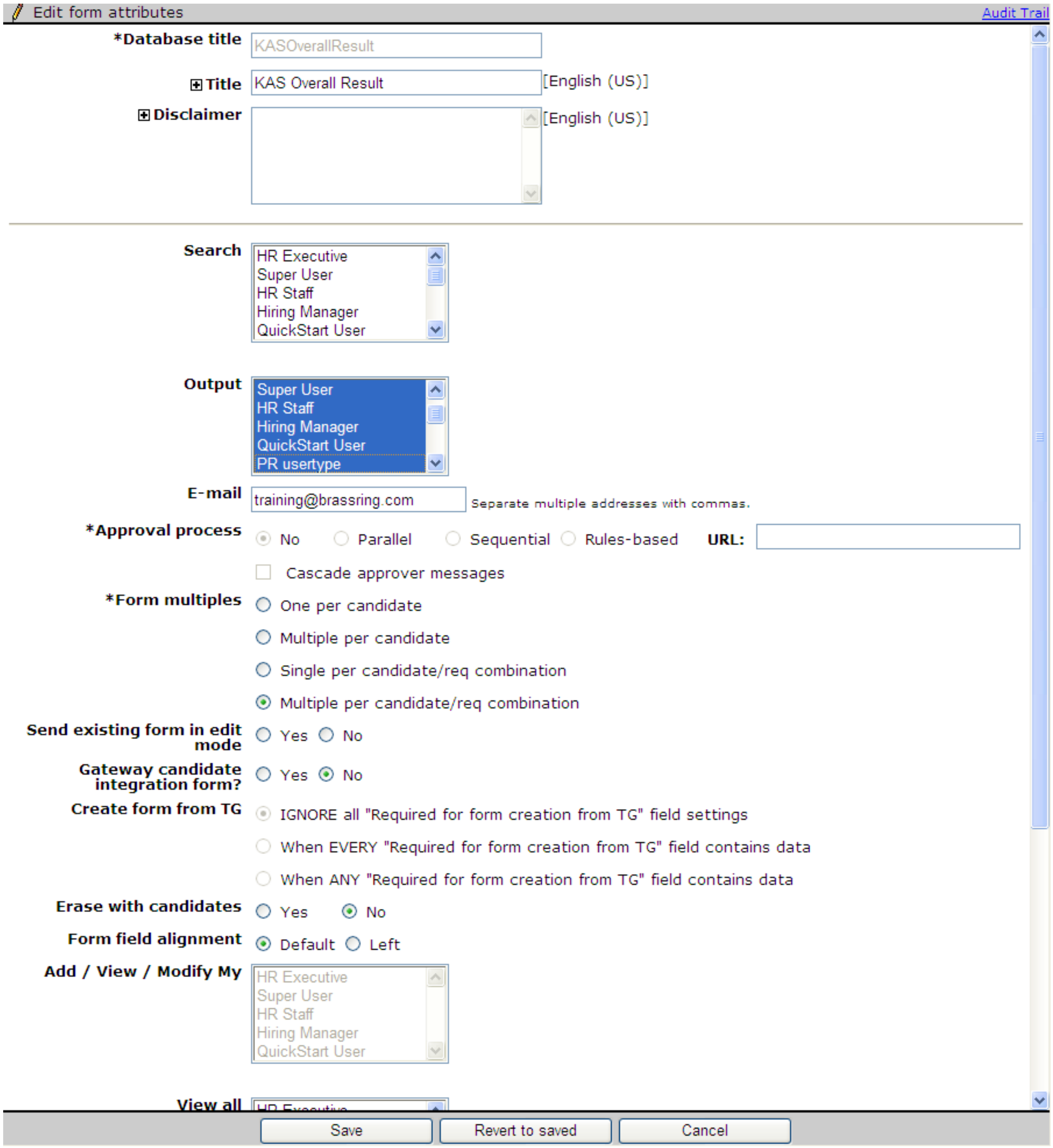
Best Practice: Determine each batch's launch method/purpose and rename the field accordingly so the end user can easily identify which candidates will be taking the assessments and when. For example, instead of "AssessmentBatch1", rename to "TG Assessments – Internal"

Configure Candidate Forms

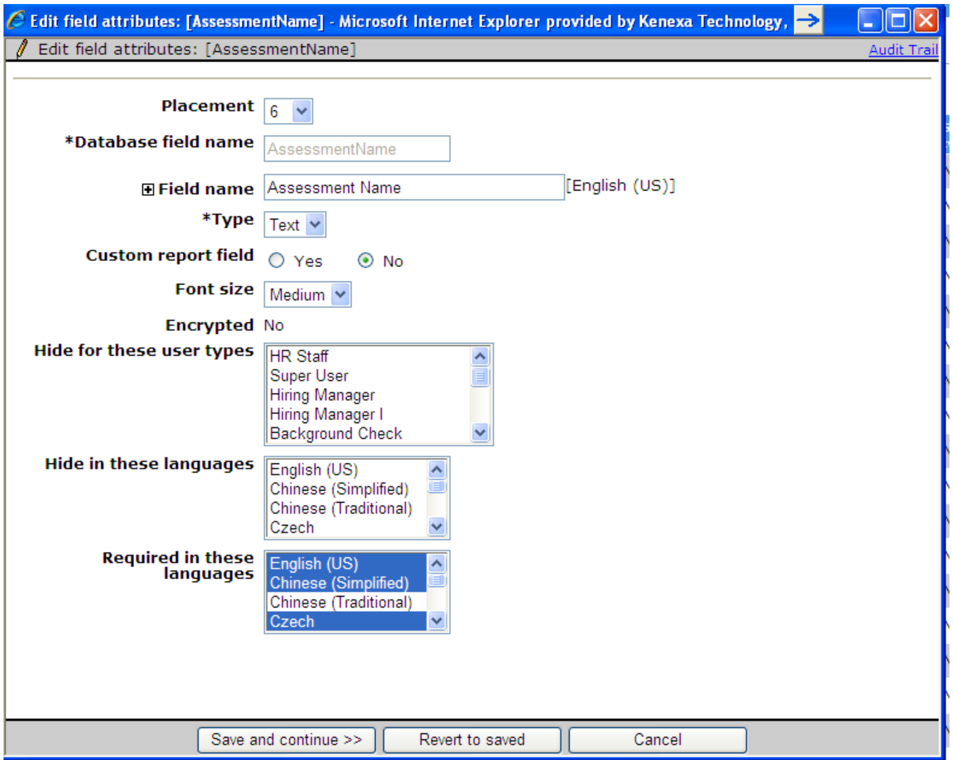
Two candidate forms are created for Kenexa Assessments; both are multiple/req/candidate.

- KAS Results
- KAS Overall Results (only with batches)

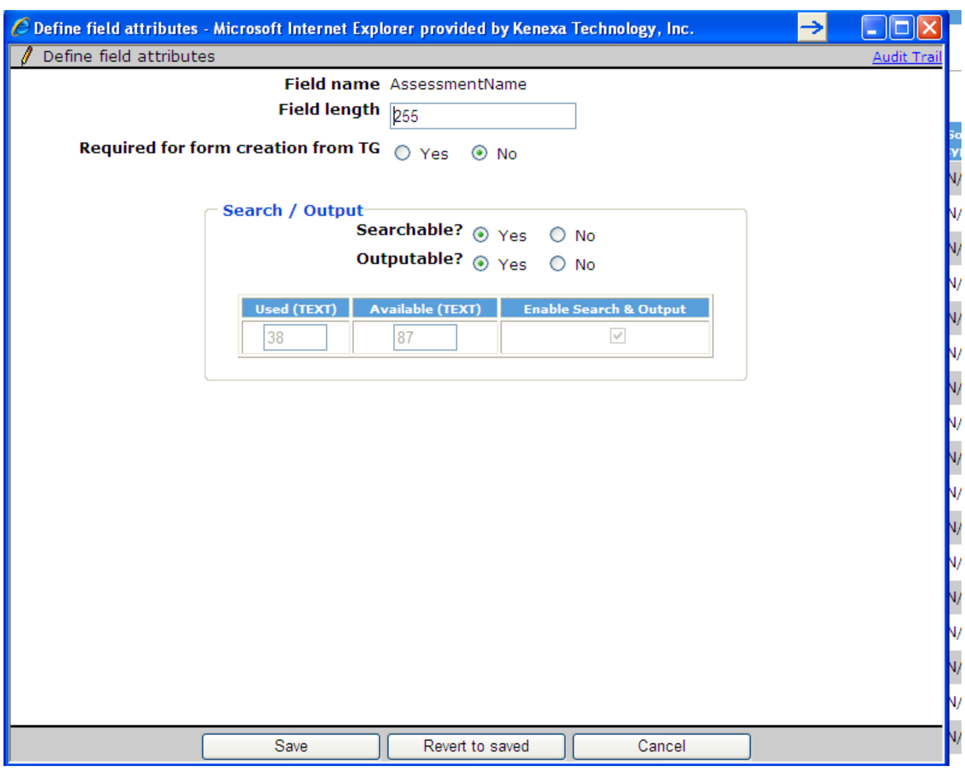
To ensure each User Type has the appropriate privileges, you can set the form attributes in Workbench **Tools > Forms > Candidate forms > Edit form attributes**. Note that many of the attributes are system defined and are not modifiable



Next determine which fields need to be visible to each User Type and update those that will appear in the Req grid to be outputable (**Tools > Forms > Candidate forms > Administer form fields > Edit field attributes**).



Click **Save and continue** to modify the field name to better suit the client's environment.



Fields available on **KAS Results**:

- Last Name
- First Name
- Requisition ID
- Assessment Batch Name – may be helpful if using batches, more likely will view this directly on form or in integration tab
- Assessment Code/ID – typically not meaningful to the 2xB user
- Assessment Name – Important to have and should be outputable if displaying results in grid
- AssessmentAdmin/RecruiterEmail
- Date of Assessment
- Elapsed Time
- Questions Correct – may be desired, more likely the “Results” or “KRB Band” field will be displayed
- Reporting Band – used for reporting, this contains the same custom banding text as “KRB Band” but is only in black/white so html tags are not included
- KRB Band – if configured for banding, this should be outputable
- Results – can use this or simply display the band
- Link to Assessment Summary Page
- Numeric Results – mainly used for behind the scenes purposes
- T Score – rarely used; check with test consultant
- Z Score – rarely used; check with test consultant
- Raw Score – rarely used; check with test consultant
- Link to Assessment Report 2 – only for custom reports
- Link to Assessment Report 3 – only for custom reports

Fields available on KAS Overall Results:

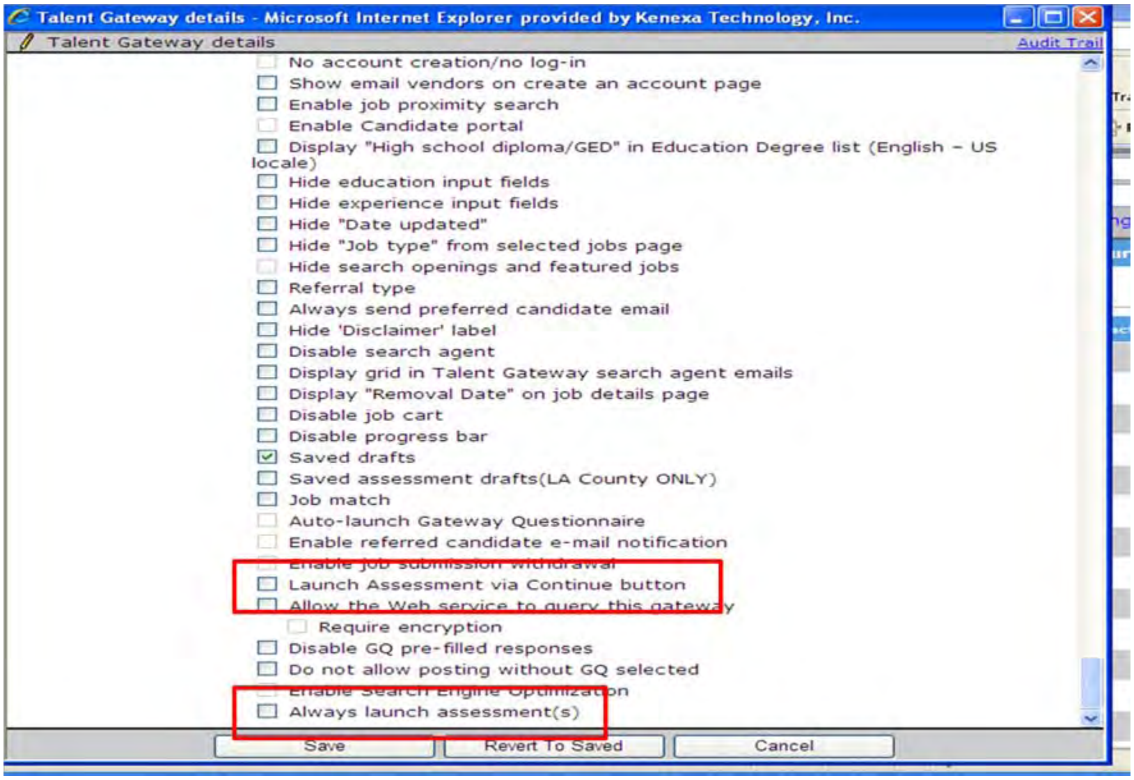
- Date Created
- Candidate Last Name
- Candidate First Name
- Assessment Batch Name – needed to identify the batch
- Batch Band UI – this will only be populated when using the Overall Score feature, this text will appear in color on the UI if configured to do so
- Batch Band reporting – this is for reporting purposes; it does not need to be displayed on the grid. This will have the same text as the Batch Band UI but will not have color. This field can be used with Automation Manager “RAM” triggers to automatically update the candidate’s HR status
- Batch Score – this will display the system calculated overall score if desired
- HR Status Update – This field will display “Yes” if the candidate gets a passing score for all tests in the batch; a “No” if any test is not passed. This field can be used with Automation Manager” triggers to automatically update the candidate’s HR status.

Administer Talent Gateway Launching Options

Two options for launching Assessments are available on the TG Admin page in Workbench **Tools > Talent Gateways > Admin > Edit details**:

- **Launch assessment via continue button**: enable this feature to take the candidate to the TG Assessment page via the Continue button rather than displaying a link on the confirmation page. As of R12.3 Build 3, this his can be used for multiple job applies as well as single job applies.

  Best Practice Use this option.
- **Always launch assessments**: with this setting, candidates always takes assessments, regardless of TG/GQ score. It removes the need to have scored questions and to designate a minimum score to administer assessments on the posting page.

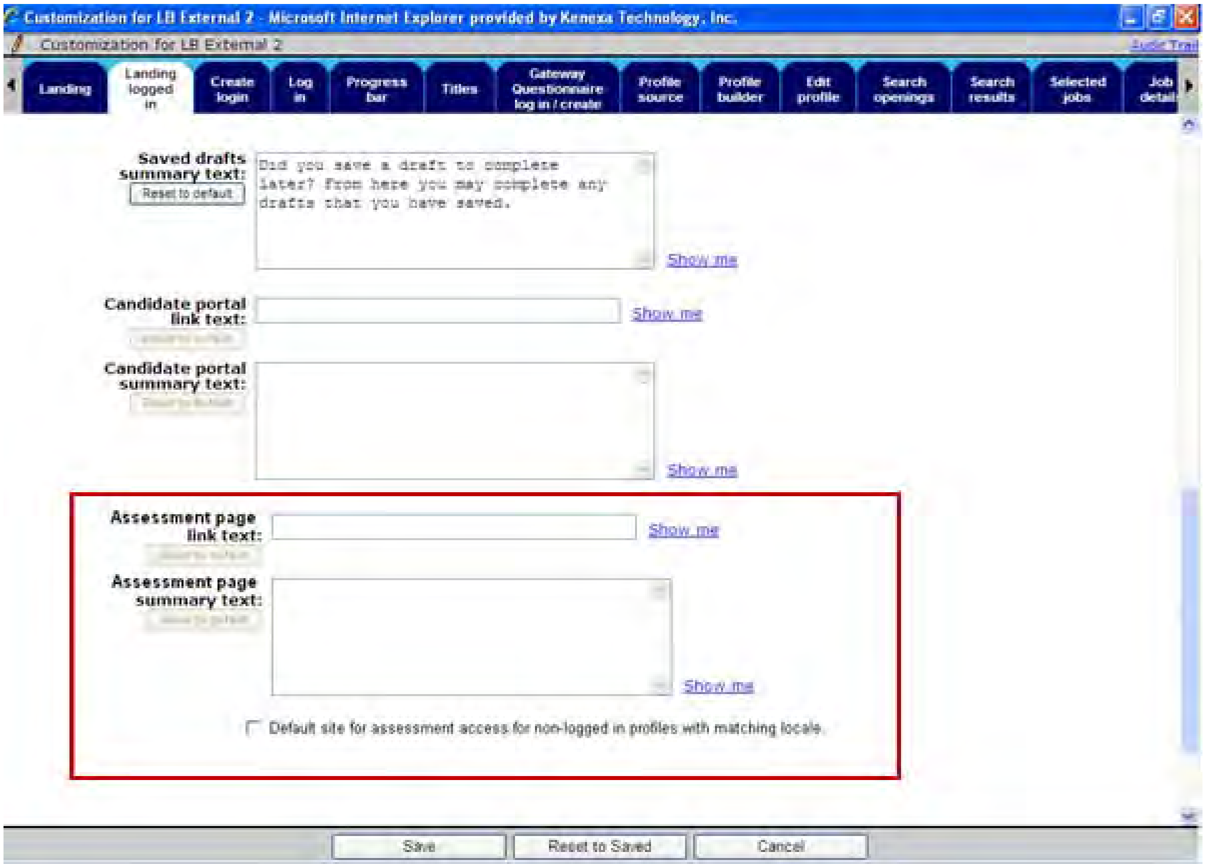


Customize Talent Gateway Text

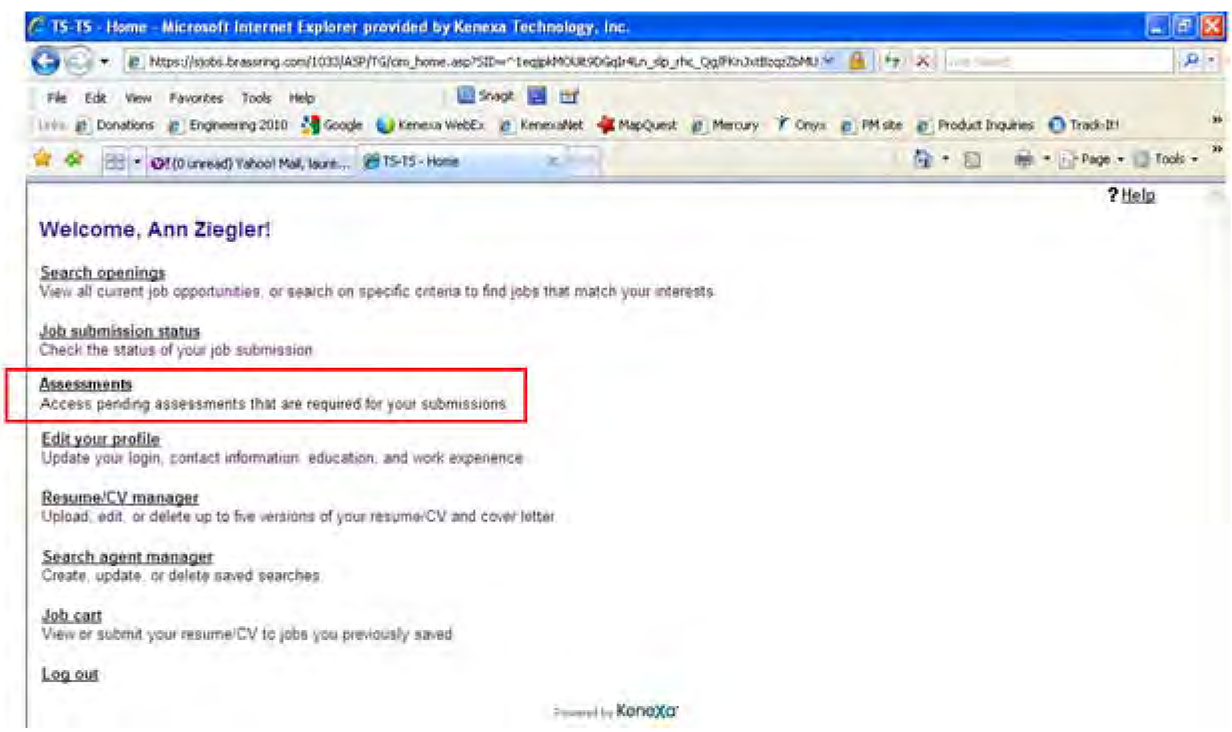
Configure the assessments-related text for the Talent Gateways in Workbench **Tools > Talent Gateways > Text customization > Edit**.

Landing logged in Tab

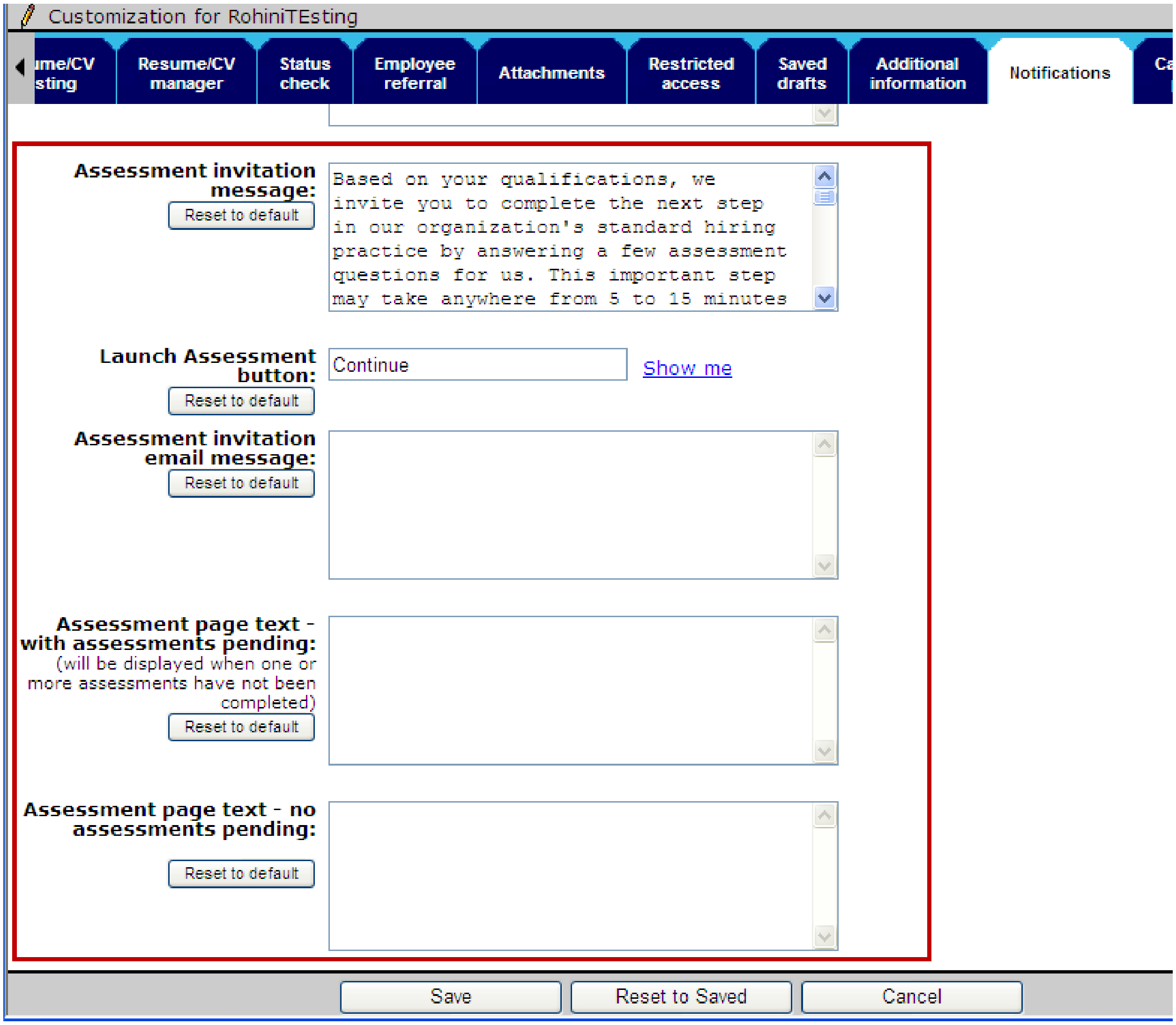
Configure the text for the link to the assessment page and the descriptive text provided for the link. Each locale must have a default TG set, in the event a candidate without a TG profile needs to access an assessment page.



The text entered on Landing logged in tab appears here:

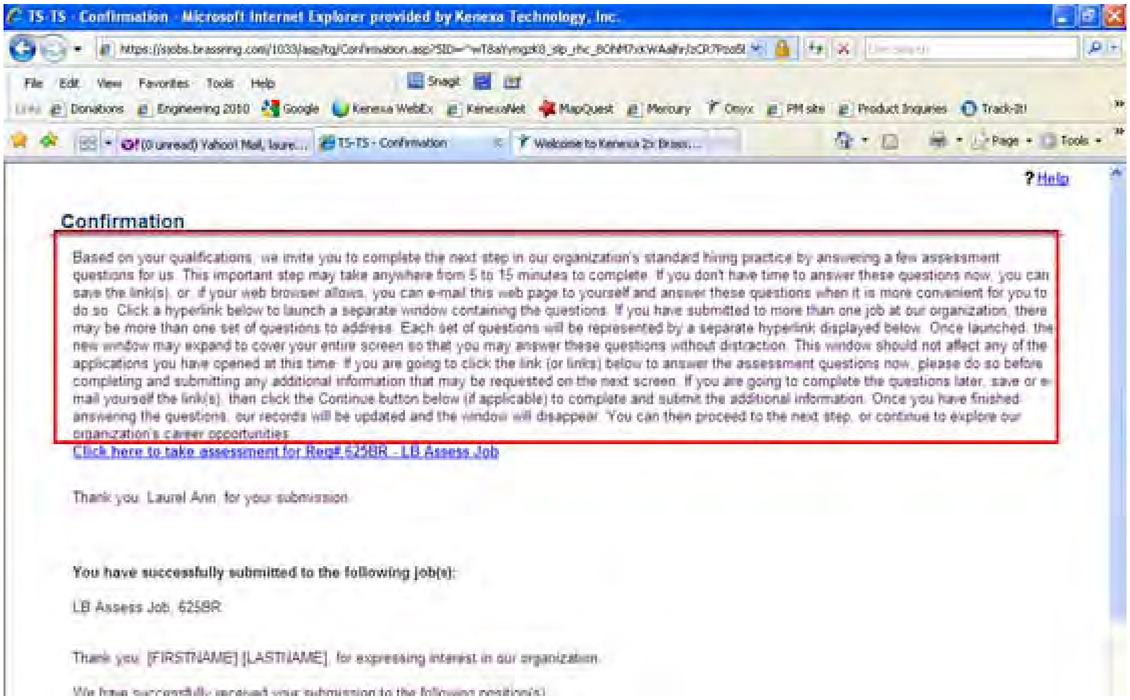


Notifications Tab

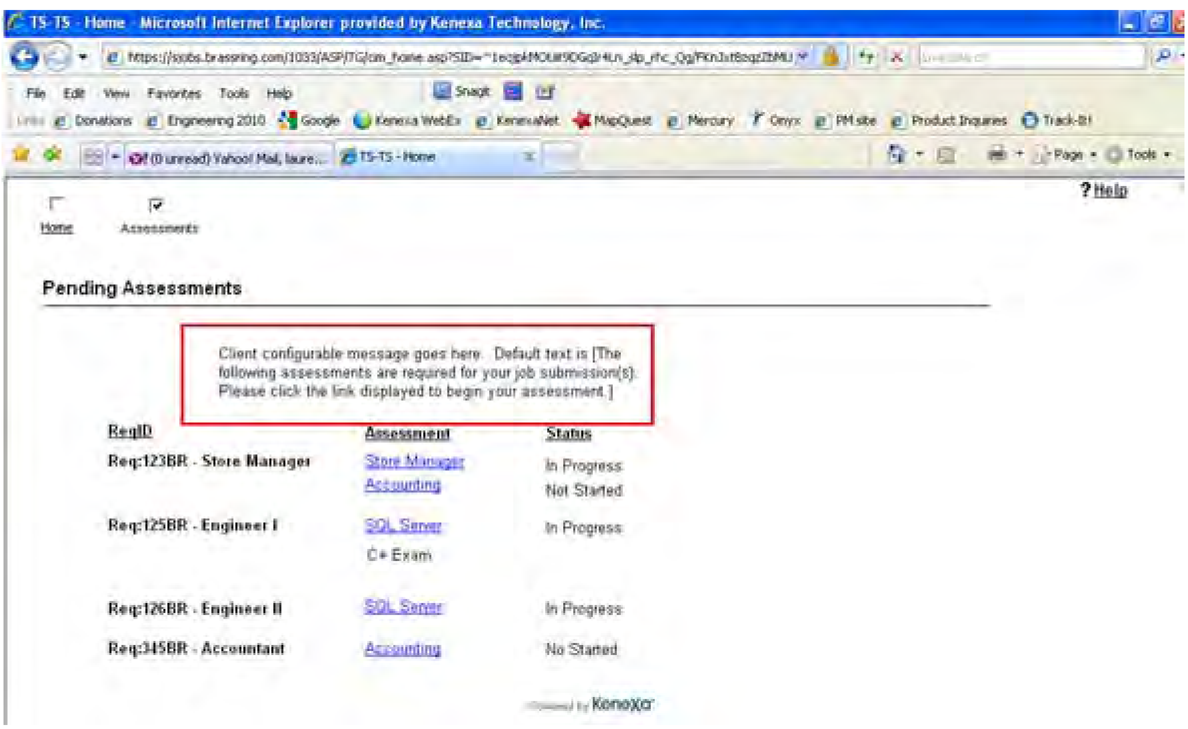


- **Assessment invitation message**: this is the text that appears on the confirmation page when the candidate is required to take an assessment. **Note**: if the assessment link needs to be displayed on the confirmation page, rather than launching via the Continue button, the following must be added where the link should appear: “[URL]”
- **Launch Assessment button**: this field can be used to add custom text to the button on the confirmation screen; this can help make it clear to the candidate that they have not truly completed their application process yet.
- **Assessment invitation email message**: create text here if candidates should receive email invitations in addition to having the assessment provided via the TG. If there is no message entered an email will not be sent.
- **Assessment page text – with assessments pending**: this is the instruction text that displays on the TG-Assessment page. Candidates see the outstanding assessments for <u>all</u> requisitions they have applied to on this page. This text displays when there are outstanding assessments
- **Assessment page text – no assessments pending**: this is the same as above but displays when no assessments are required.

This figure shows where the first field displays:



This figure shows where the last two fields display:

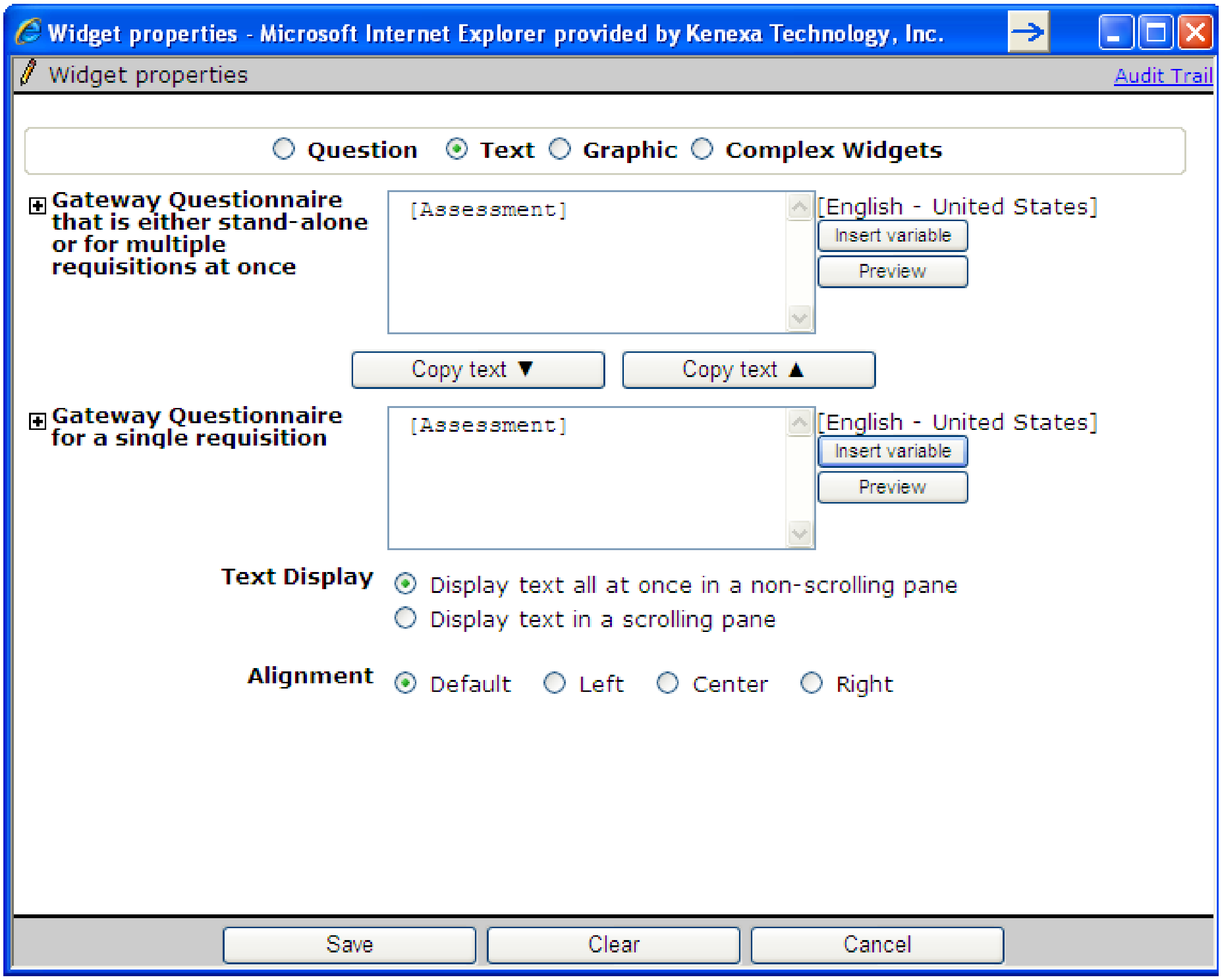


Add Assessment Widget to Gateway Questionnaire(s)

You must add the assessment widget to the confirmation page of the GQ in order for assessments to be offered to the candidate (in Workbench **Tools > Gateway Questionnaires > Administer sections/pages > Administer widgets > Add new widget**). If the “Always launch assessments” TG

Admin setting is not turned on, then the GQ needs at least one scored question, and the minimum score to launch assessments must be entered on the site questions page.

Insert a Text widget on confirmation page. Click **Insert variable,** select **Assessment**, and **Save**.



KAS Assessments – Linking to Results from Candidate Grid

Clients using integrated KAS Assessments (KAS) can now place the URL link for viewing KAS results on the candidate grid. This reduces the number of navigation clicks required to view the results.

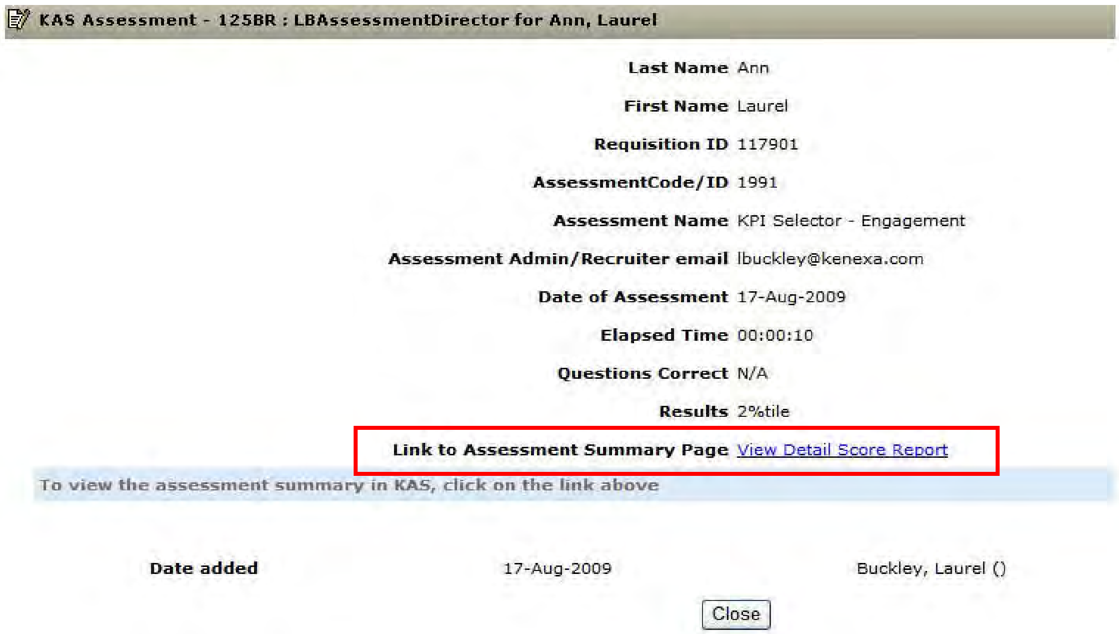
Date Available	US: 28/JAN/10 EU: 03/FEB/10
Product	☑ Workbench Self-Service ☑ New UI ☑ 2x BrassRing ☐ Talent Gateways ☐ Agency Manager ☐ Data Insight Tool ☐ SmartApproval
Visible Changes	☑ No – contact your CSC for implementation details. ☐ Yes – see the cumulative Visible Changes document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☐ Specific conditions required – see details below. ☑ Configuration required – see details below.

Benefits

This feature makes displaying KAS results more convenient by reducing the number of clicks required to do so, from three clicks to one.

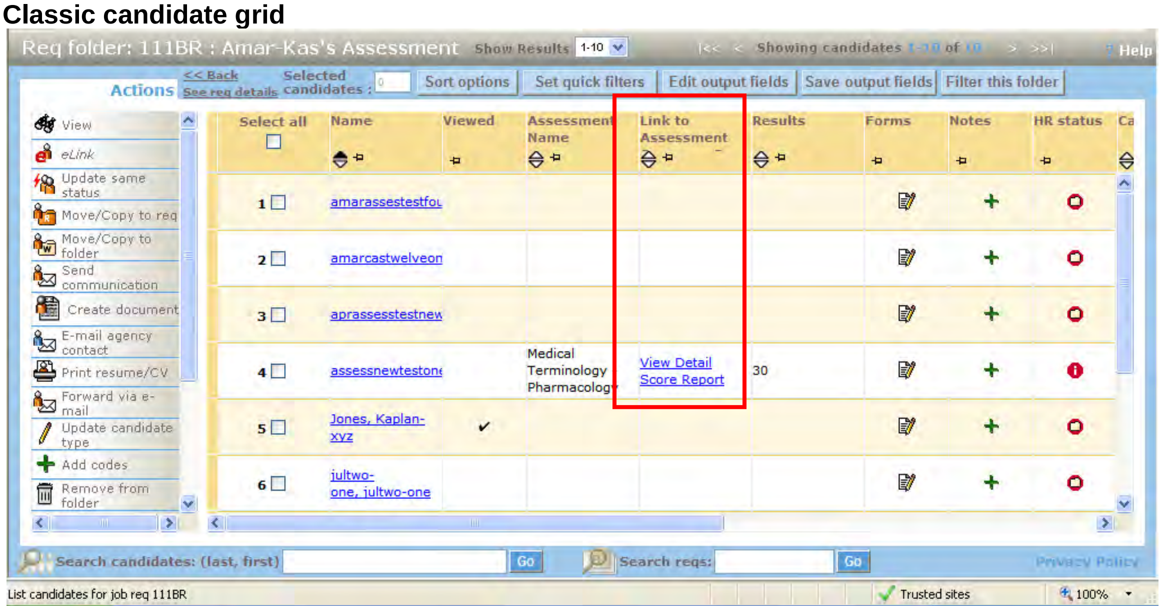
Feature Description

If your organization uses integrated KAS, utilizing the “Searchable KAS” integration, candidate results for those assessments are stored within 2xB on a standard candidate form. One of the fields stored is a URL link to the KAS page that displays detailed results. Users can access the form and click the link to view the results, as in the following figure showing a candidate’s KAS form.

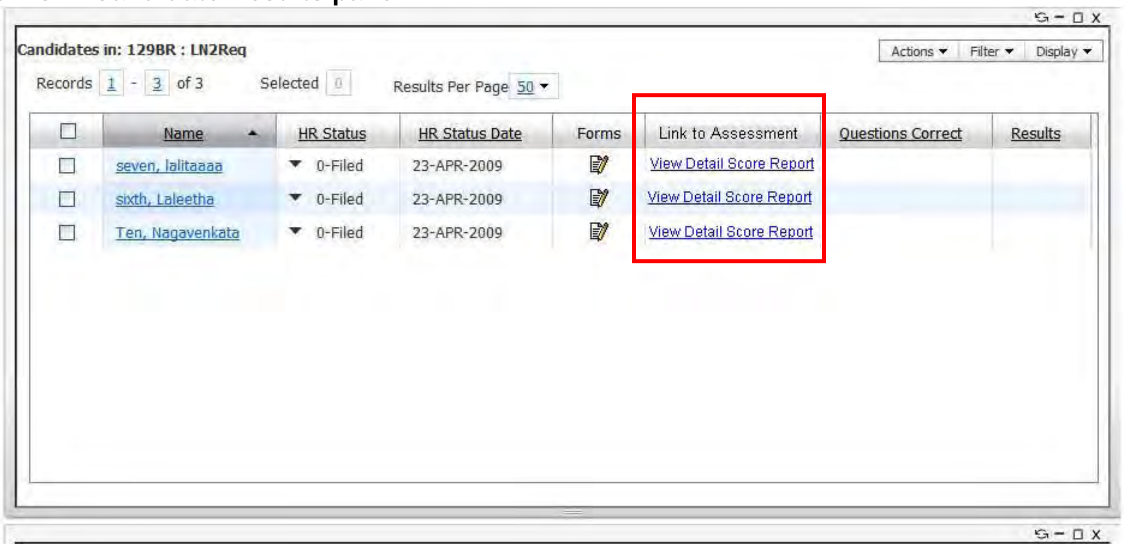


To provide 2xB users with even more convenient access to the results than from the candidate form, certified Workbench users can make the existing link outputable. This allows it to be displayed on the candidate grid within the Req folder for classic 2xB, or directly on the Candidate Results panel for the new 2xB UI. When placed there, 2xB users can get results with one click instead of three.

Classic candidate grid



New UI – Candidate Results panel



Candidates with Multiple Results

For a candidate with multiple assessment results, 2xB users see one link to the most recent assessment results for the req in the Req folder view and on the new UI Candidate Results panel.

Limitations and Known Issues

- The assessment results link field is outputable only – it is not searchable.
- In working folders and the search results grid (for Candidate Search, Filter Folder, Run Saved Search), if the candidate has multiple results, users will see concatenated results (which may be for multiple reqs) when they click in the field with the links. To view individual results users should access results from the candidate forms or the pertinent req folders.

How Do Clients Get this Feature?

The results field can be made “outputable” when desired by a certified Workbench user.

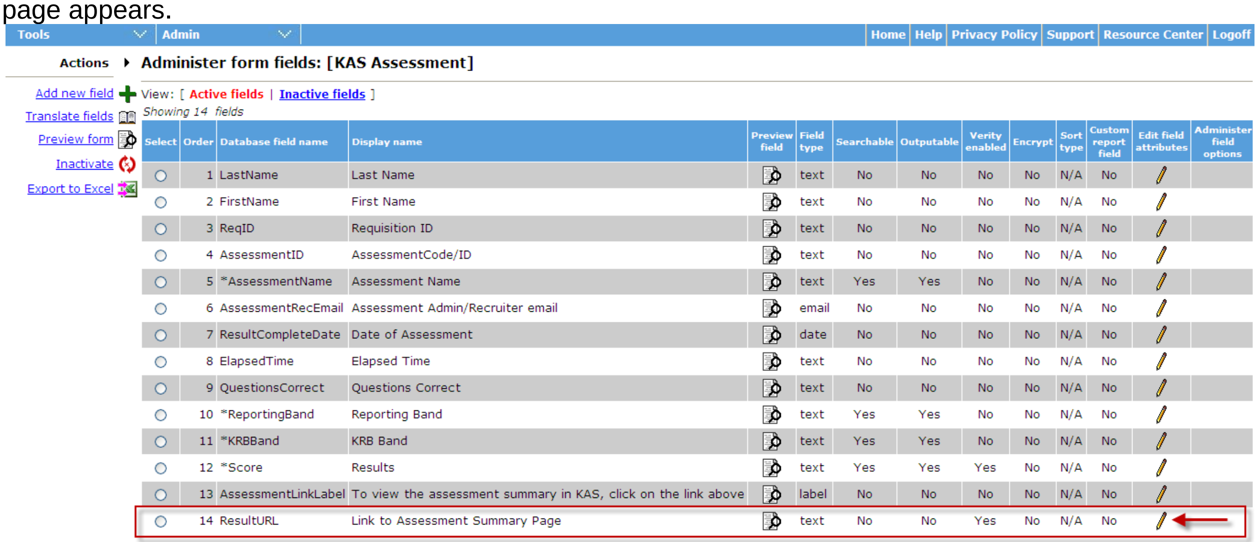
Workbench Self-Service

Who does this: Kenexa staff and Certified Workbench Users

Kenexa staff or a certified Workbench user can enable the feature when desired. The field must be made outputable then configured to display. The final step is for 2xB users to add the field to their personalized views.

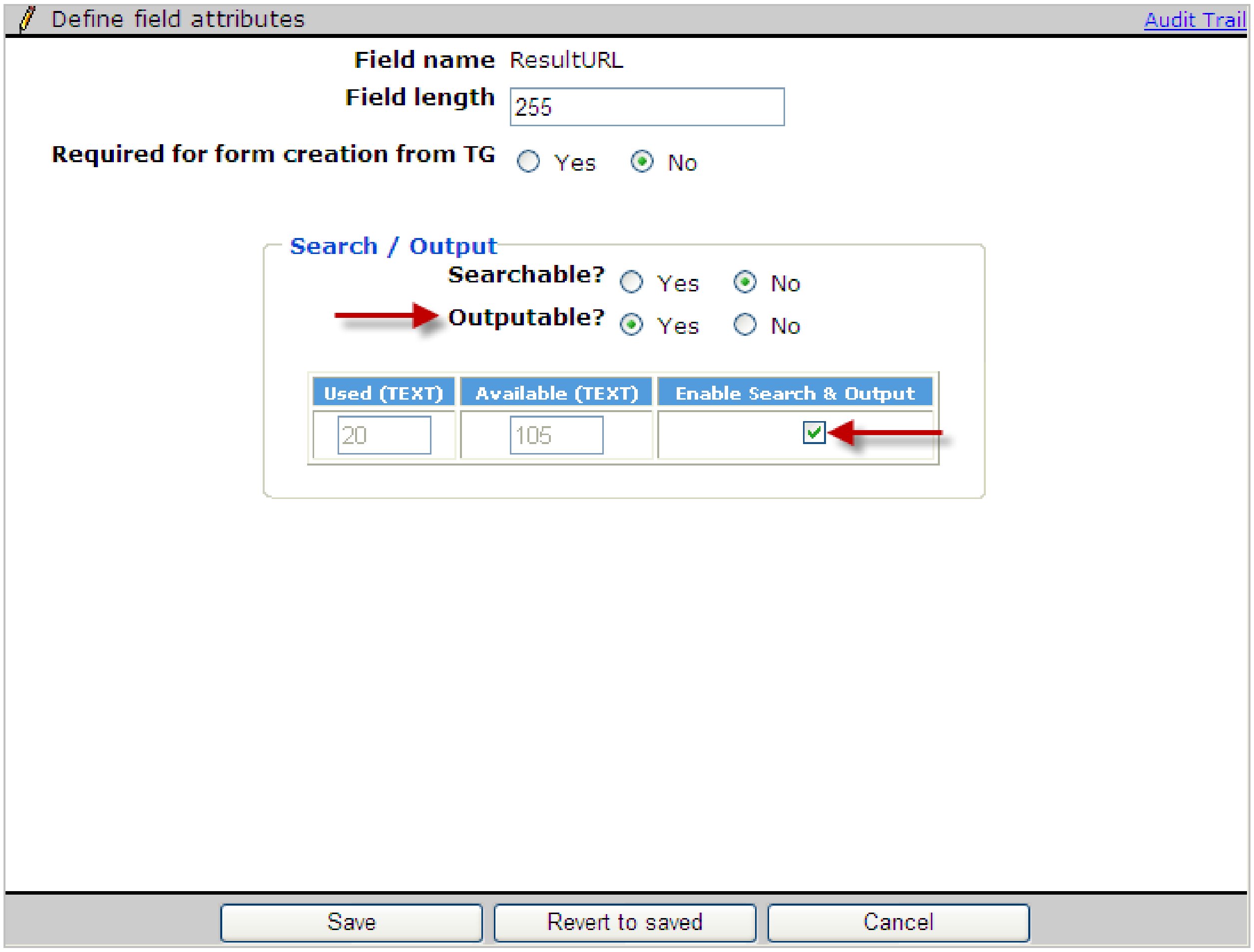
To make the field outputable (WB Certified Tier 0-4):

1. In Workbench, navigate to **Tools > Forms > Candidate forms**. The **Candidate forms** page displays. It lists all candidate forms that have been created in 2xB.
2. Click the **Administer form fields** icon for the KAS Assessment form. The **Administer form fields** page appears.



Select	Order	Database field name	Display name	Preview field	Field type	Searchable	Outputable	Verity enabled	Encrypt	Sort type	Custom report field	Edit field attributes	Administer field options
	1	LastName	Last Name		text	No	No	No	No	N/A	No		
	2	FirstName	First Name		text	No	No	No	No	N/A	No		
	3	ReqID	Requisition ID		text	No	No	No	No	N/A	No		
	4	AssessmentID	AssessmentCode/ID		text	No	No	No	No	N/A	No		
	5	*AssessmentName	Assessment Name		text	Yes	Yes	No	No	N/A	No		
	6	AssessmentRecEmail	Assessment Admin/Recruiter email		email	No	No	No	No	N/A	No		
	7	ResultCompleteDate	Date of Assessment		date	No	No	No	No	N/A	No		
	8	ElapsedTime	Elapsed Time		text	No	No	No	No	N/A	No		
	9	QuestionsCorrect	Questions Correct		text	No	No	No	No	N/A	No		
	10	*ReportingBand	Reporting Band		text	Yes	Yes	No	No	N/A	No		
	11	*KRBBand	KRB Band		text	Yes	Yes	No	No	N/A	No		
	12	*Score	Results		text	Yes	Yes	Yes	No	N/A	No		
	13	AssessmentLinkLabel	To view the assessment summary in KAS, click on the link above		label	No	No	No	No	N/A	No		
	14	ResultURL	Link to Assessment Summary Page		text	No	No	Yes	No	N/A	No		

3. Click the **Edit field attributes** icon for the **ResultURL** form field.
4. On the **Edit field attributes** page, click **Save and continue>>**. The **Define field attributes** page appears.



5. Change **Outputable** to **Yes** and check **Enable Search & Output** if it is not already checked.
6. Click **Save**.

Next, configure the assessment results URL to display in the candidate grid, either by default or at the 2xB user's selection (must be WB Certified Tier 4).

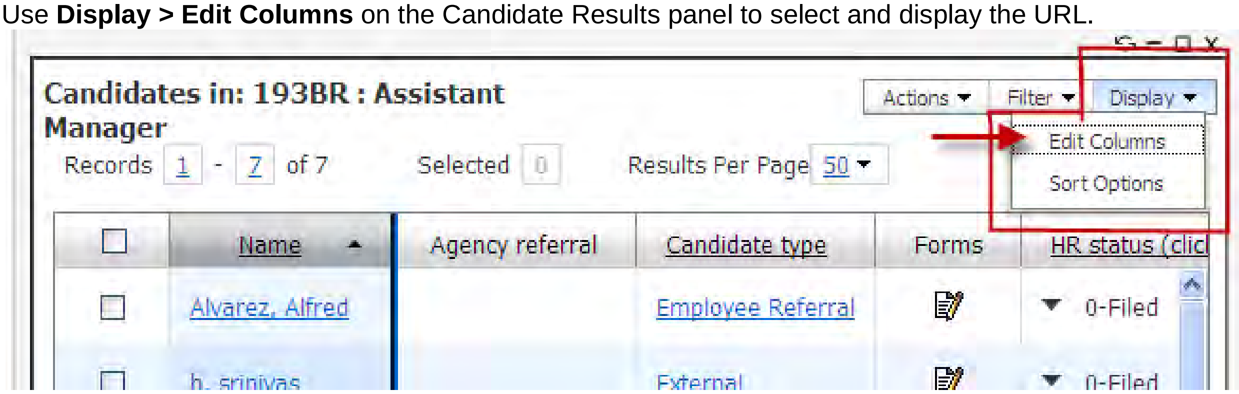
- For the new UI:
  In Workbench, add the **ResultURL** column to the Candidate Results panel using **Tools> Settings > Panel Configuration**.
- For classic 2xB:
  Define the **ResultURL** field as a default output field using **Tools> Settings >Output fields.**

2x BrassRing User

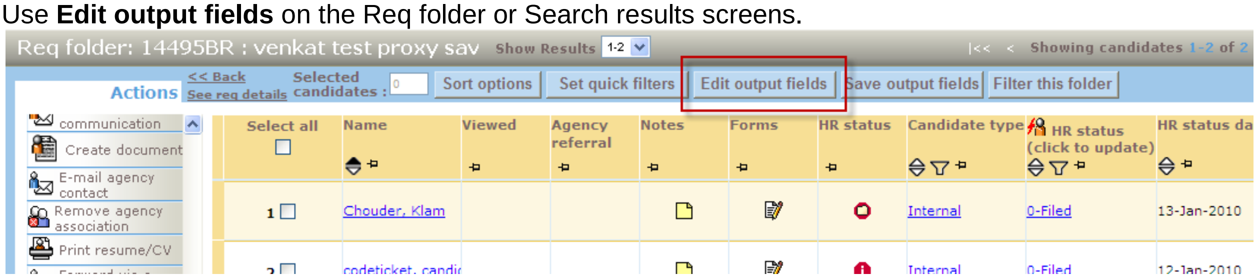
Who does this: 2xB User

The final step is for 2xB users to add the Results field from the Assessment form to their personalized candidate results views.

- For the new UI:
  Use **Display > Edit Columns** on the Candidate Results panel to select and display the URL.



- For classic 2xB:
  Use **Edit output fields** on the Req folder or Search results screens.



Integrations: Kenexa Interview Builder and 2x BrassRing

The integration between Kenexa 2x BrassRing™ and the Kenexa Interview Builder (KIB) module simplifies the recruiter and hiring manager's experience by providing easy access to pre-defined interview guides from within the recruiting application and workflow. Interview guides are built around the competencies' required per job, ensuring that key candidates are easily identified. Results for interviews are scored and stored within 2xB for easy viewing and quick access to interview details.

Date Available	US: 11/MAR/2010 EU: 17/MAR/2010
Cost	☑ No additional cost for clients with KIB ☐ Additional cost – contact your CSC for details.
Product	☑ Workbench Self-Service ☑ New UI ☑ 2x BrassRing ☐ Talent Gateways ☐ Agency Manager ☐ Data Insight Tool ☐ SmartApproval ☑ Kenexa Interview Builder
Visible Changes	☑ No – contact your CSC for implementation details. ☐ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☐ Specific conditions required – see details below. ☑ Configuration required – see details below.

Benefits

The integration simplifies the recruiter and hiring manager's experience by providing easy access to pre-defined interview guides from within the recruiting application and workflow. Results for interviews are scored and stored within 2x BrassRing for easy viewing and quick access to interview details.

Feature Description

The Kenexa 2x BrassRing integration with Kenexa Interview Builder® gives you convenient access to over 3000 behavioral, situational, attitudinal and job knowledge interview questions, from which you can create interviews based on the competencies required to succeed in your organization's jobs. Each question has standardized scoring on an accompanying rating scale to help you evaluate candidates on the required competencies. The integration allows 2xB users to initiate all required Interview Builder tasks from within 2xB, without needing to log in separately to KIB. Based on the action selected, users are redirected into the appropriate Interview Builder screen with fields pre-populated based on 2xB data. Users can also be redirected automatically into Interview Builder when updating a candidate's HR Status to one associated with Interview Builder.

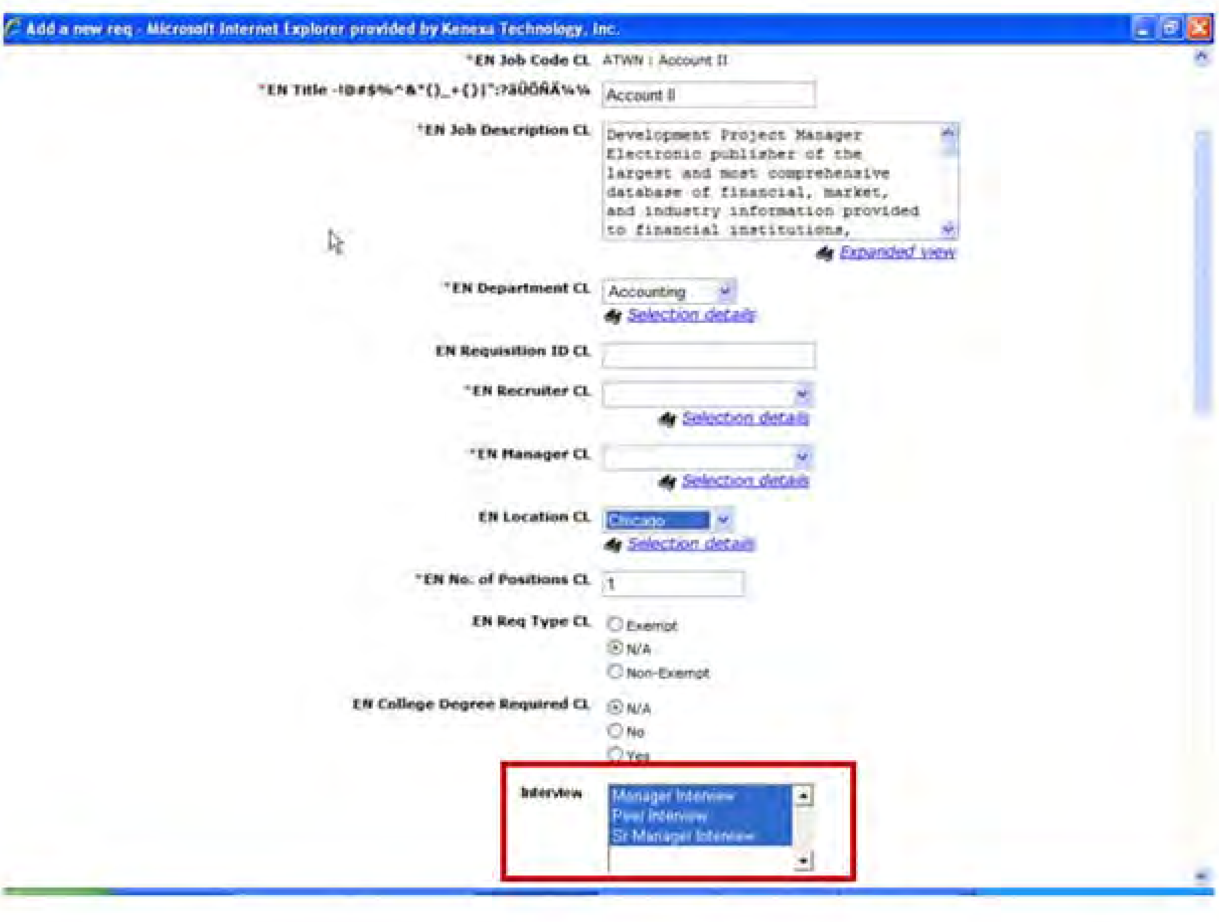
- Users do not need to be separately set up in KIB; based on their 2xB permissions they will gain access only to those screens for which they are approved.
- The integration ensures consistency of data by tying each interview guide to a 2xB job code.
- Users cannot inadvertently use an interview guide that was not created around a specific job's competencies.
- Results of scored interviews will be displayed on the 2xB candidate grid to expedite final selection of candidates.

KIB actions users can initiate from 2xB include:

- Add/Edit Req with interview
- Print/send interview
- Score interview
- View interview results
- Create/maintain interview templates and guides

Adding a Job with Associated Interviews

When a 2xB user adds or edits a Req with associated KIB interviews, a field listing the associated interviews is available. The user can select interviews from the multi-select list that are associated with the Req's job code (the field can be hidden, read only, or required by user type).

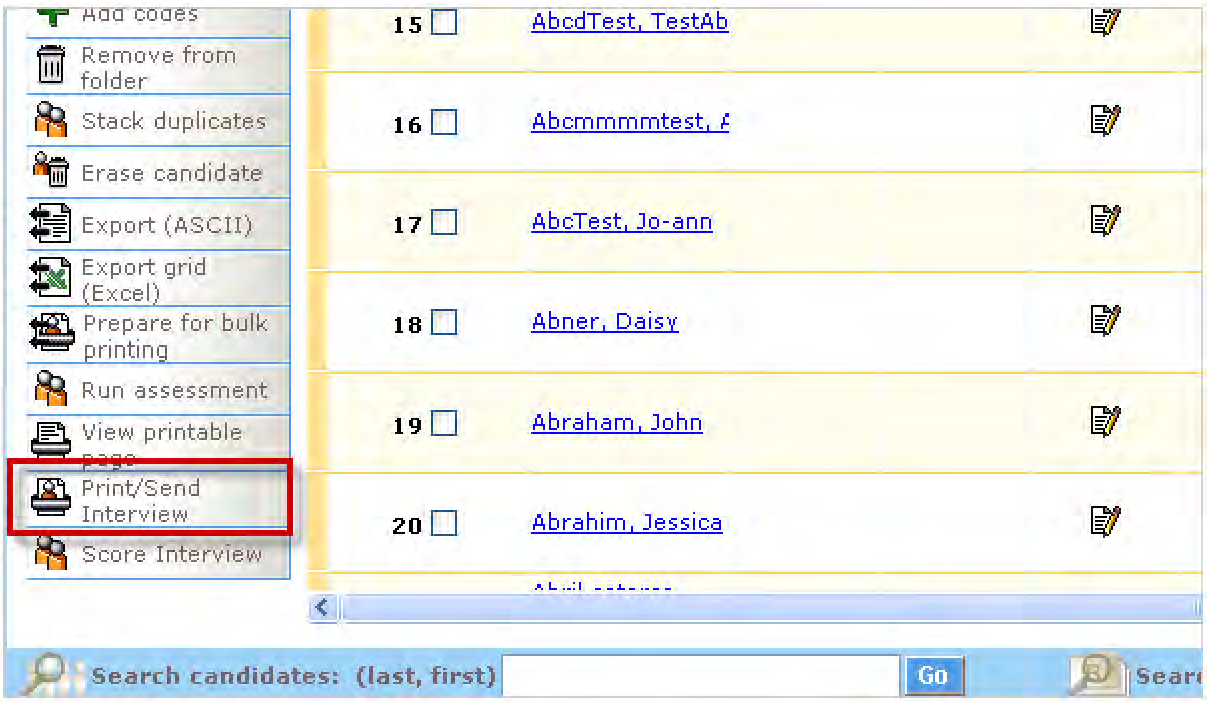


Printing or Sending Interviews through Req Folder Action Button

When a candidate is selected to be interviewed, those participating in the interview process will need to receive a copy of the interview questions they are required to ask. This could be either via a printed copy or by emailing a link to the interview that allows direct access to the KIB system.

To print or send an interview:

1. In a Req folder, users with the **Interview Builder – Print/Send Interview** privilege select the candidate scheduled to be interviewed.
2. In classic 2xB, click the **Print/Send Interview** action.



—OR—

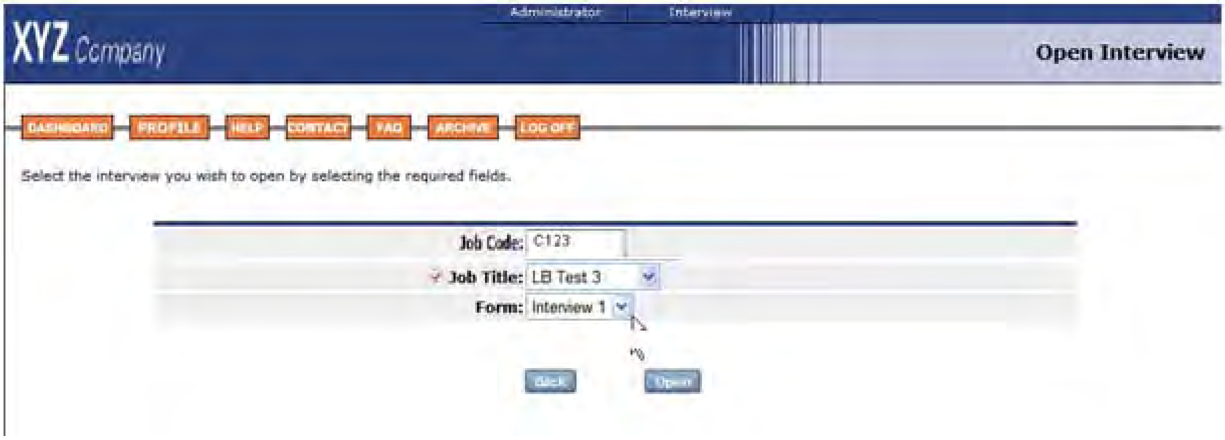
In the new UI, on the Candidate Results panel (launched from a req panel), you can select one candidate and click **Print/Send Interview** from the **Actions** menu.

3. If the candidate is at an appropriate HR status, the user is redirected to the KIB Dashboard in a pop-up window. (If the candidate is not at an appropriate HR status, an error message is presented.)

4. Select the desired action.

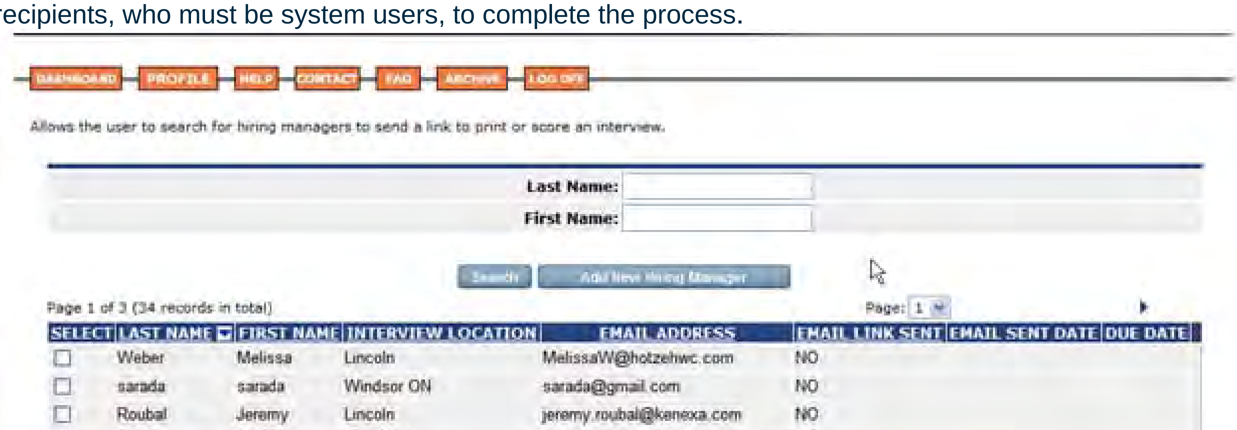
- **Print/Email Interview** — print the interview form for use during the interview, or e-mail the interview form in PDF format to any others who will be using it to interview the candidate. This option is typically used to distribute interviews to non-system users.
- **Send Interview Link** — send one or more recipients a link to an interview to score it online. Recipients can access the link both to print the interview and to insert scores when ready. This option can only be used with system users.

The KIB Open Interview screen appears.



5. Select the desired **Job Title** and **Form** (interview guide) if necessary, and click **Open**. The Interview Form screen appears.

6. Click the desired action to **Email** or **Print** the interview. If emailing, you'll also have to select recipients, who must be system users, to complete the process.

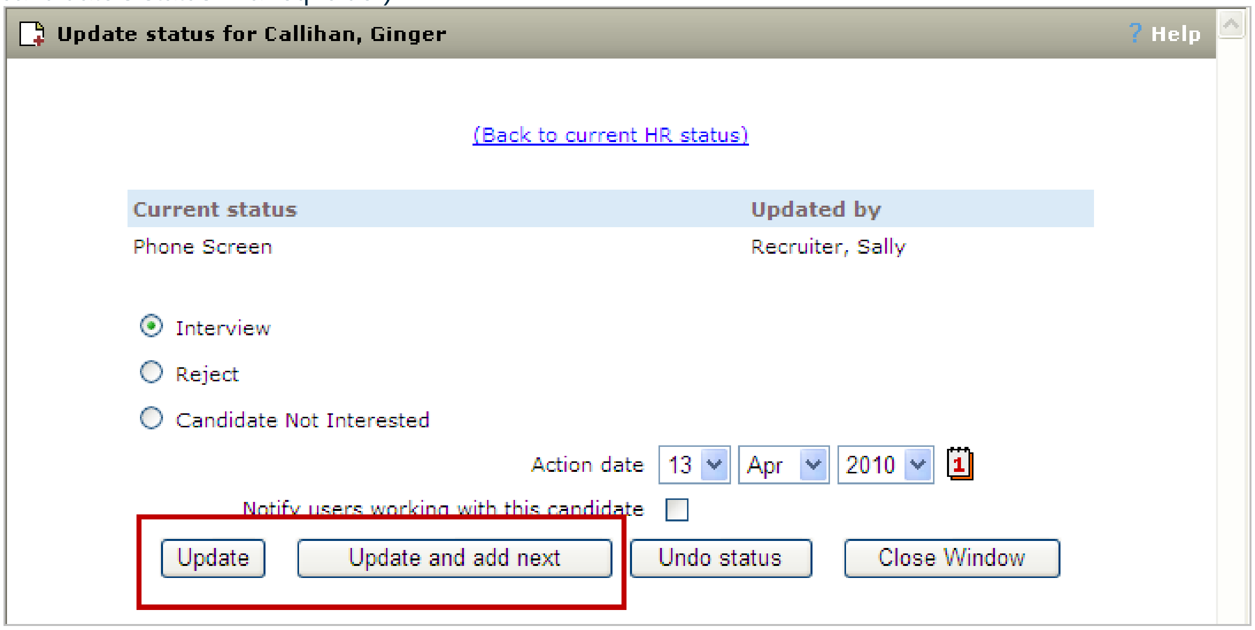


Printing or Sending Interviews through HR Status Update

HR Status attributes can also be configured so that when a 2xB user updates one candidate to the designated HR Status from a Req folder, the user is automatically redirected into KIB. Examples of common HR Status choices for triggering this action might be “Interview” or “Second Interview.” With the attribute set, if the user updates to that status, KIB opens in a popup window.

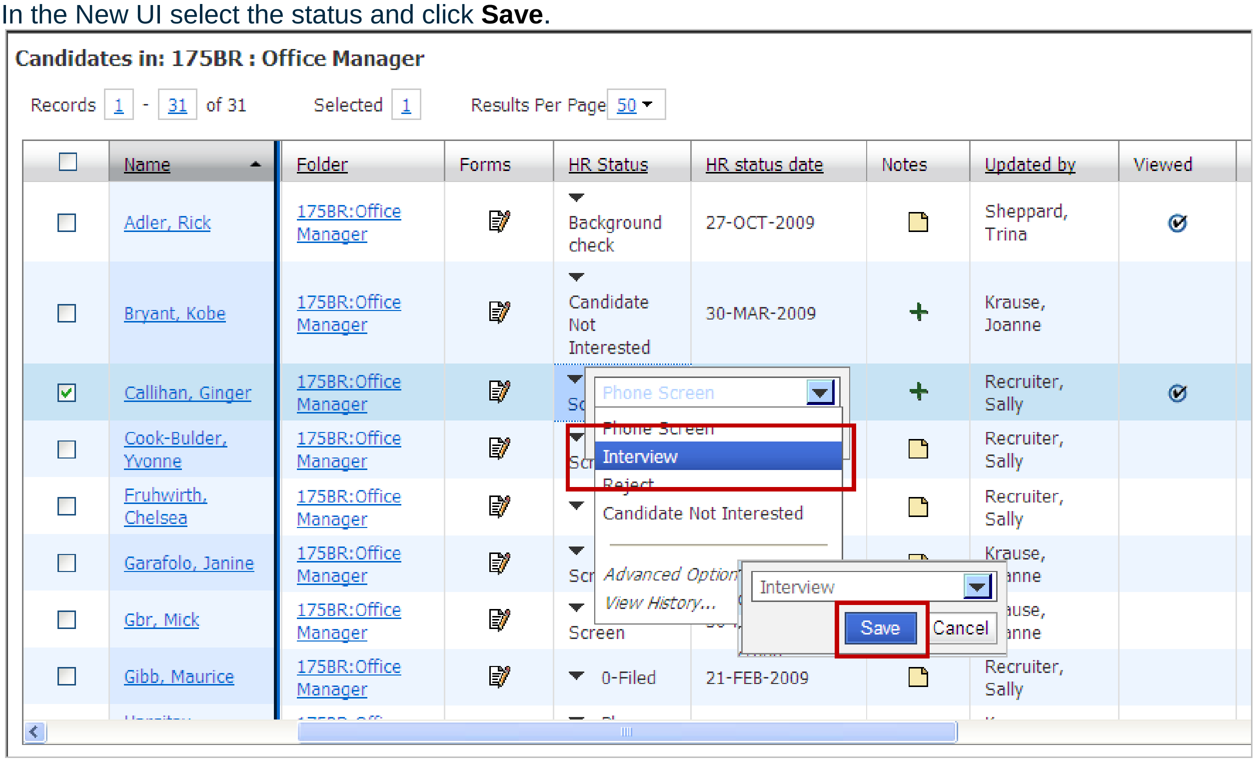
To access KIB via an HR Status update:

1. In classic 2xB, click **Update** or **Update and add next** on the **Update status** screen (after selecting a candidate's status in a req folder).



—OR—

In the New UI select the status and click **Save**.



7. The KIB Dashboard opens with the **Print/Email Interview** and **Send Interview Link** options, where you can make your selections and complete the process.

Scoring Interviews

To score an interview, users select the best perceived match for the provided ratings on how well the interviewee responded (e.g., response was germane, described proactive behavior, etc.). Users can score the same candidate multiple times, in order to allow a system user to score interviews on behalf of non-system users.

You can score an interview in Normal or Consensus mode. Normal mode is used when you enter only your own set of interview scores. Normal mode is also used by each interviewer to whom you emailed a link to an interview form – individual interviewers enter their own scores when they click the link in their email. Consensus mode is used when more than one interviewer will be scoring a candidate (up to eight interviewers can rate an individual candidate concurrently when an interview has been completed). When in Consensus mode, you can score the interview on your own and discuss individual scores with the panel after the interview, **or** you can include all interviewer's names and scores on one interview guide. These scores will then be averaged automatically.

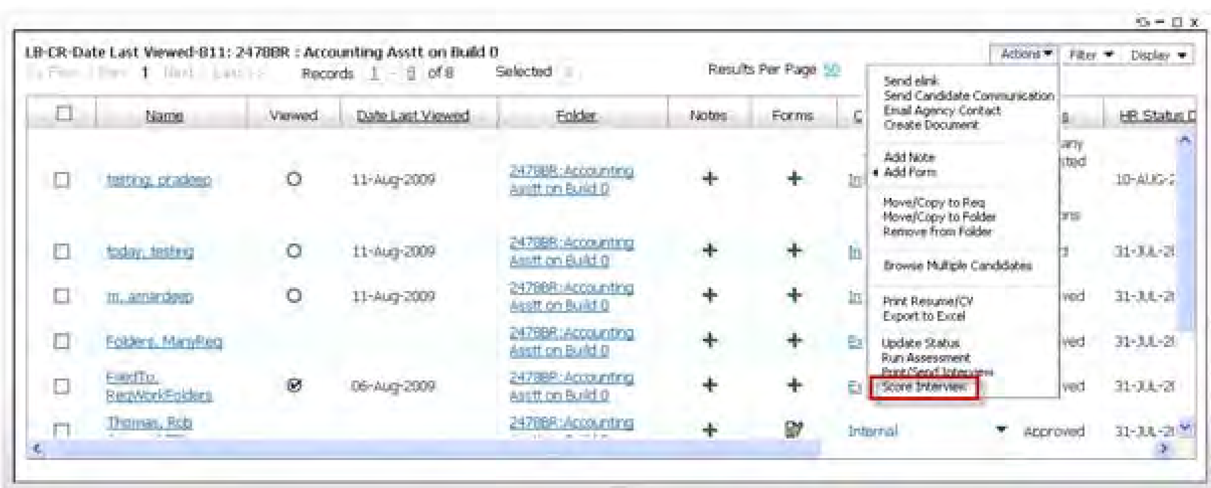
To begin the scoring process in either mode:

1. In a Req folder, users with the **Interview Builder – Score Interview** privilege can select the candidate whose interview is to be scored, and then click the Score Interview action.

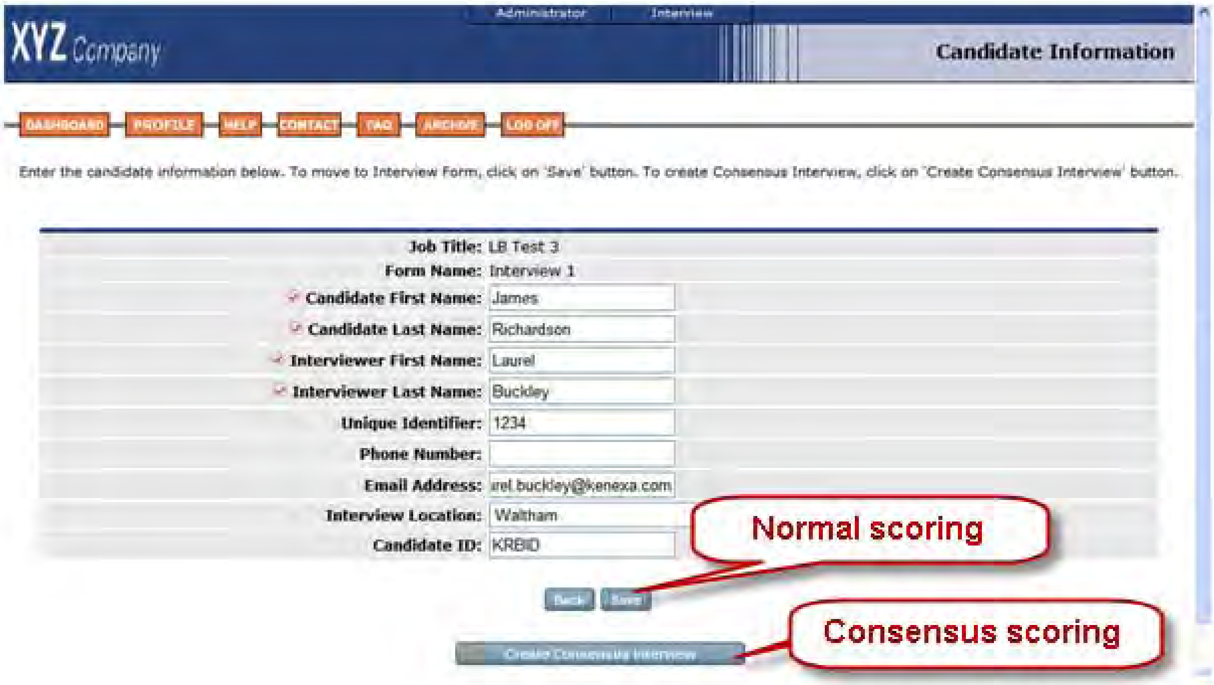
The **Interview Builder, Print/Send or Score Interview** HR Status attribute ensures that interview guides are not distributed or scored for a candidate until they reach the appropriate HR status. These actions cannot be taken for the candidate unless this attribute is enabled for the HR status they are associated with at the time the action is taken.

—OR—

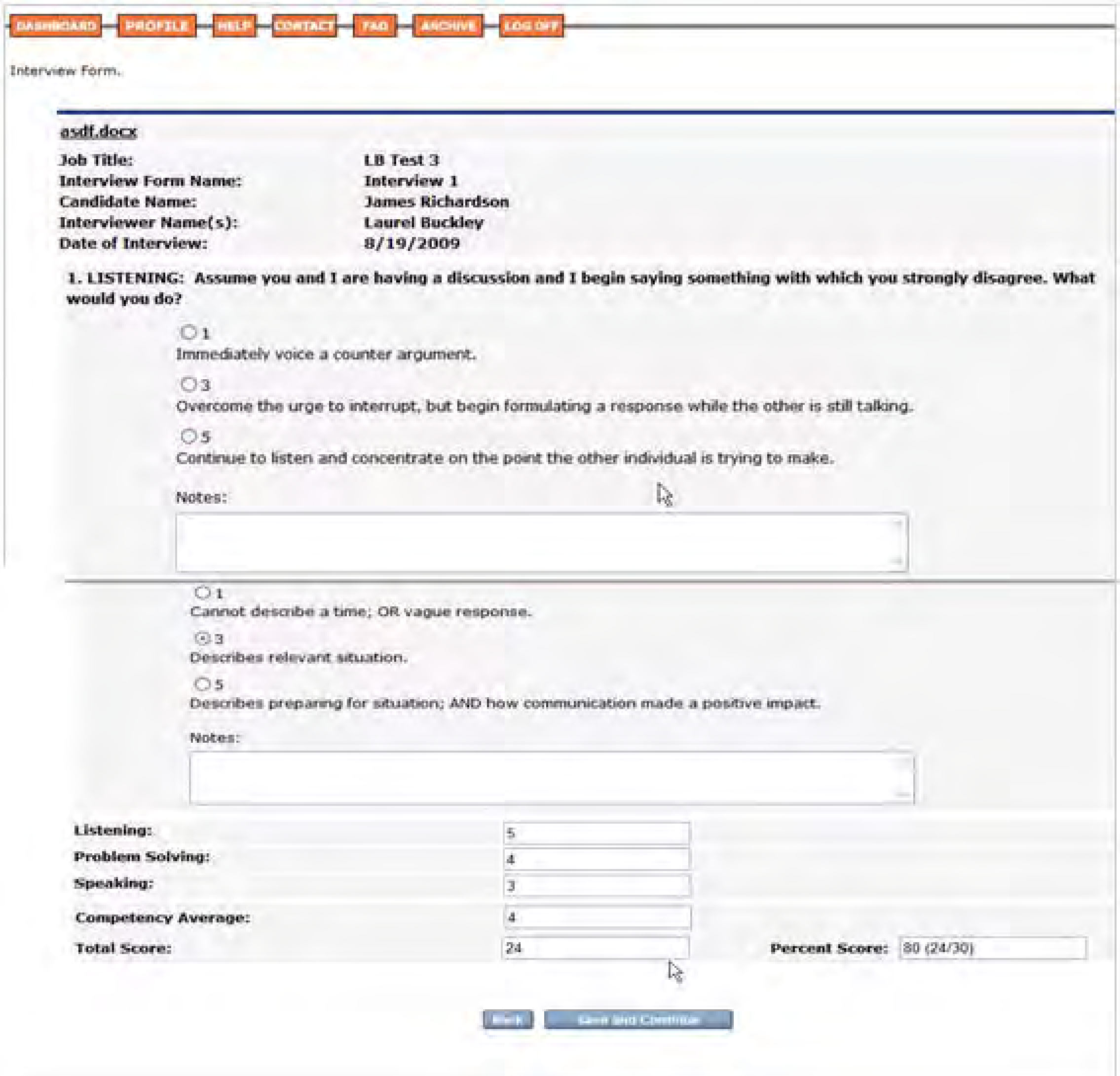
In the new UI, on the Candidate Results panel (launched from a req panel) you can select one candidate and click **Score Interview** from the **Actions** menu.



2. The user is redirected into the KIB **Open Interview** pop-up screen. Key data is pre-populated for the user based on the Req for which the action has been taken, and the user selects the interview to **Open**. The Candidate Information screen follows.



3. Update any of the candidate information, and click **Save** to score in Normal mode, or click **Create Consensus Interview** to score in Consensus mode on the resulting screens.



4. Enter your scores, clicking **Save and Continue** to save your data as you proceed.

Displaying Interview Results in 2xB

Once the interview has been scored in Interview Builder, the results are returned to 2xB and stored as a multiple per-candidate per-req form. The fields can be made outputable for easy comparison of scores across candidates. View the results in the Req folder grid (use **Edit output fields** to add them to the grid), on the Candidate Results panel in the New UI, or on Candidate Forms.

Results in Classis 2xB Req folder grid

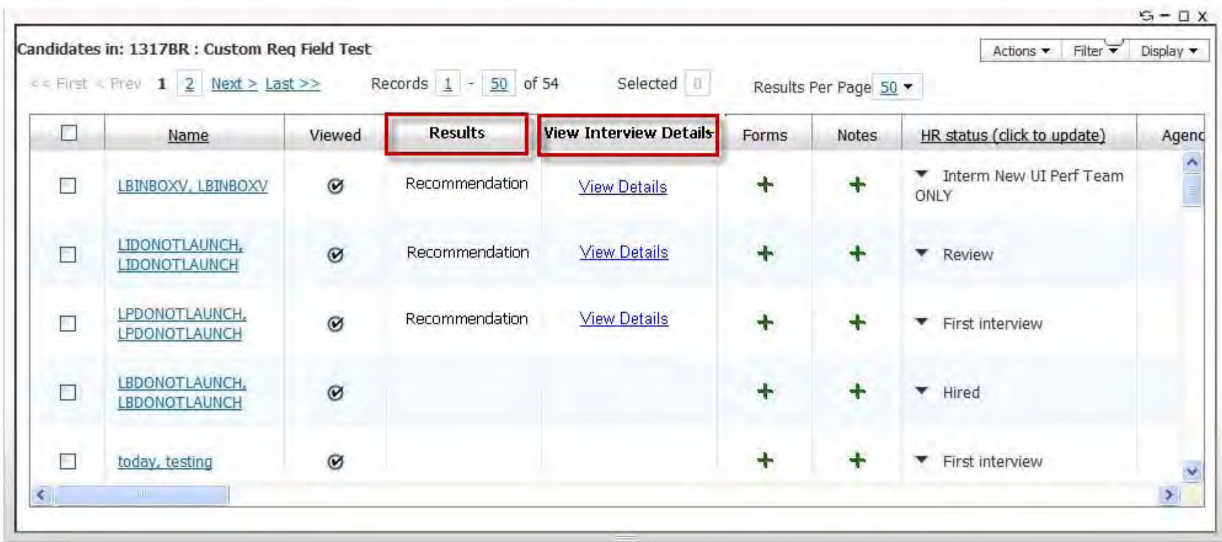
Detailed results on Form

Besides the candidate's name and the Req ID, this view includes:

- Interview Form Name
- Interviewer Name (in Consensus Mode this will say "Consensus"

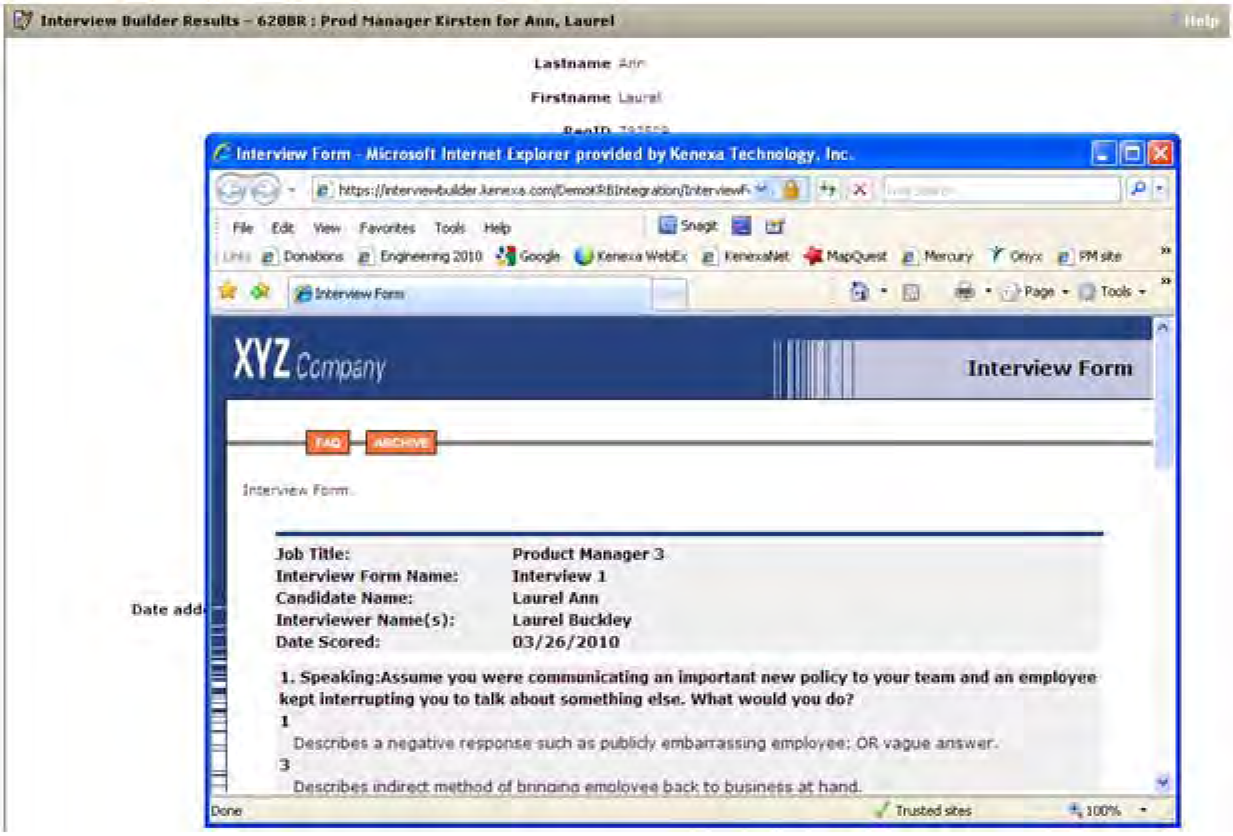
- Date of Interview
- Total Score
- Percentage score
- Results (this will be one of the following: Recommendation or Overall Recommendation Band
- Active links to **View Interview Details** and to **Edit Interview**

Results in New UI Candidate Results for the Req



Click the **Interview Details** link in Classic 2xB —OR— click the **View Details** link in the New UI to enter KIB to view read-only detailed scoring information for each question.

Detailed Results in KIB



Click the **Edit Interview** link to modify responses in KIB. You come to an editable screen similar to the Detailed Results shown in the preceding figure, where you can make your changes. Once saved, the new results are updated in 2xB).

Creating and Maintaining Interviews and Interview Templates

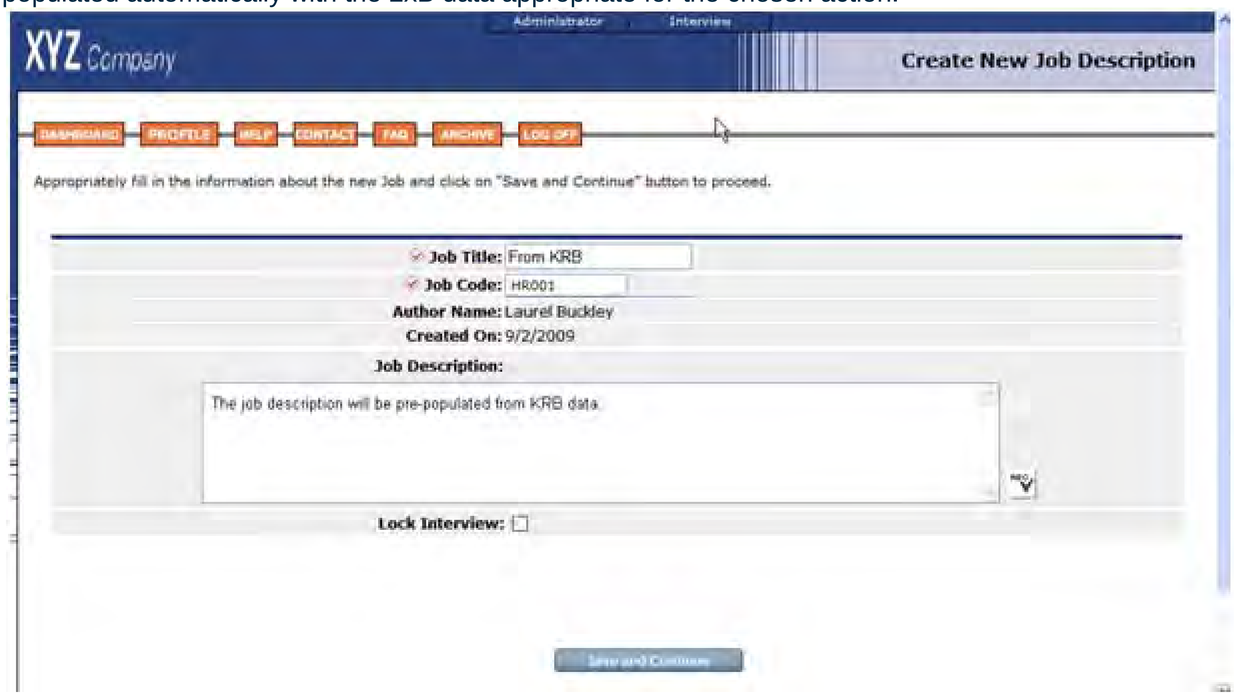
2xB administrators with appropriate privileges can create and edit interview templates, or create interview guides (also simply called interviews) using a template or not, as desired. Interviews are driven by job code. Multiple Interviews can be created for each job code. For example, there may be one Interview created for 1st Interview, and a different one created for 2nd interview. When creating a requisition and associating an Interview with the Req, the user will be presented with a list of all Interviews created for that specific job code.

To access KIB to create interview guides and templates:

1. In 2xB, select **Admin** > **Admin+**, click the **Administer code list** icon for code type **Job Code**.
8. Select one job code for which you wish to create an interview or interview template, and click the action you want to perform:
   - **Create Interview Template** — create competency-based, structured interview templates for job codes
   - **Create Interview from Template** — create job-specific interview guides from templates that have been set up
   - **Create Interview** — create job-specific interview guides by selecting questions a la carte
   - **Edit Interview** — edit interview guides

- **Copy Interview** — copy an interview template or interview guide (for convenience in creating a similar one).

The appropriate Interview Builder screen opens in a pop-up window, with job and user information populated automatically with the 2xB data appropriate for the chosen action.



9. Select or enter the required information and proceed through the screens, saving your work as you progress by clicking **Save and Continue** until the template or interview guide is completed. Best practice when creating interviews and templates is to ensure the names you enter or edit are intuitive to the end user, particularly if multiple interviews (e.g., 1st interview, 2nd interview, etc.) will be created for the selected job code.

Detailed information on performing these administrative functions in KIB is available in the KIB online help.

Finding Additional Information

In KIB, you can find information on using KIB by clicking either of two orange tabs – HELP and FAQ.

Online Help

The online help provides a detailed "How-To" guide of **every** function available in the system. Help is context-sensitive, but you can use the contents, index and search functions as needed.

Frequently Asked Questions (FAQs)

Many frequently asked questions have been grouped by either Interview, Administrator or Deity functions. Even though you may not have all of the capabilities discussed in the FAQs, these questions can be particularly helpful if you are just starting out using the system. They have been gathered over the years by both our development team and our clients as issues that seem to come up on a regular basis, and can give a nice overview of the system. By taking a few minutes to read through them, you will find the system even easier to use.

How Do Clients Get this Feature?

This feature is controlled by a new client setting. Please contact your CSC for more information about the KIB integration with 2xB.

Once KIB is enabled for your account, Workbench Self-Service users and 2xB administrators can perform some KIB configuration and maintenance tasks, which include:

- Granting KIB-related user type privileges (WBSS)
- Adding the KIB-related custom Req field to Req templates for reqs where associated interviews are desired (WBSS)
- Assigning KIB User Group Privileges to Users (2xB Admin+)

Workbench Self-Service

Who does this: Certified Workbench User, Tier 1 and above

Granting User Type privileges

Seven new User Type privileges specific to KIB are available. They determine what actions a user can initiate from 2xB.

These first five privileges are associated with actions available on the Job Code screen. Users who will maintain your interviews must be given some combination of these privileges.

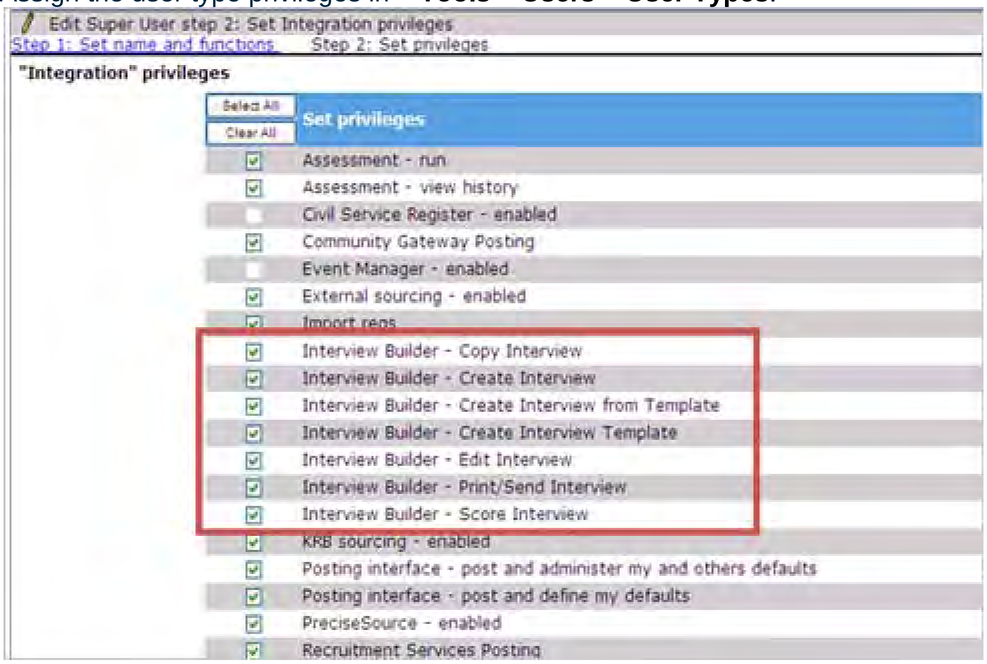
- **Interview Builder — Copy Interview**

- **Interview Builder — Create Interview**
- **Interview Builder — Create Interview from Template**
- **Interview Builder — Create Interview Template**
- **Interview Builder — Edit Interview**

The last two privileges are associated with actions available within the Req folder. Users who will distribute interviews or enter scoring detail will need these privileges.

- **Interview Builder — Print/Send Interview**
- **Interview Builder — Score Interview**

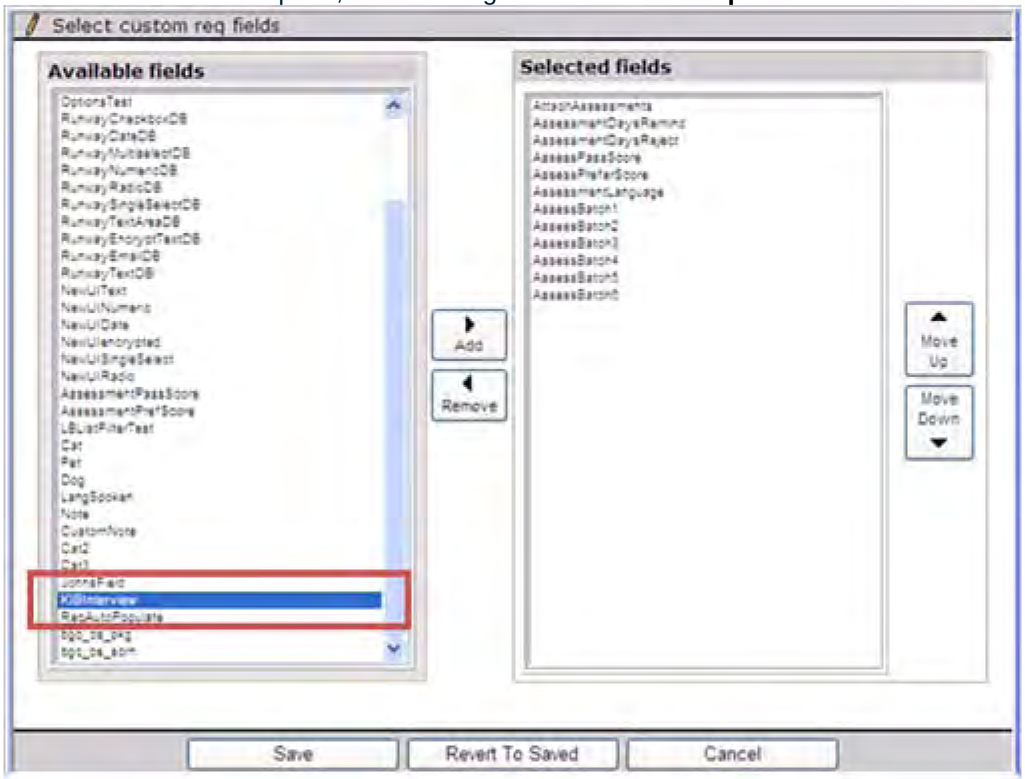
Assign the user type privileges in > **Tools** > **Users** > **User Types**.



Adding Custom Req Field to Req Templates

Add the **KIBInterview** field to all Req templates that will be using Interview Builder interviews. The field can be configured to be hidden, read only, or required by user types (this is existing form field functionality).

Add the custom req field in > **Tools** > **Forms** > **Reqs** > **Req forms**, selecting the **Administer req fields** icon for the desired template, then clicking **Select custom req fields**.



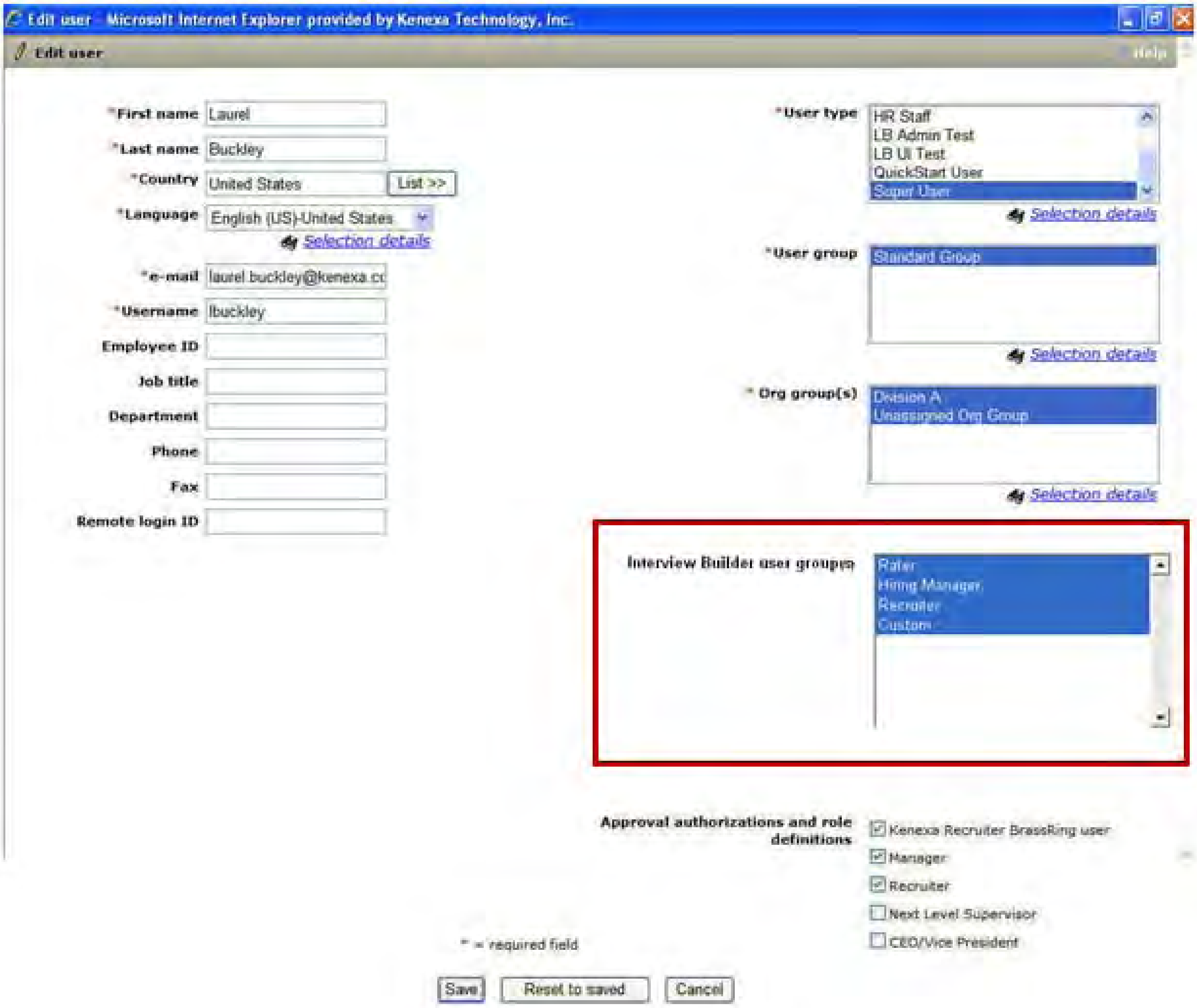
2X BrassRing Admin/Admin+

Who does this: 2X BrassRing Administrator

Assign KIB User Group Privileges to Users

2xB administrators can assign Interview Builder User Group privileges to users. These control what the user is allowed to do in KIB, and they are defined within KIB. Users do not need to be set up both within 2xB and KIB. The integration is designed to create the user profile in KIB automatically the first time the user attempts to access the system from 2xB. Any privileges defined for the Interview Builder user group(s) will be respected when the user is in the KIB system. This field does not control any privileges within 2xB.

Assign the user group privileges in **Admin** > **Admin+** > **Users**. (This can also be done initially for users in your organization by Kenexa staff, with your 2xB administrator responsible only for continuing user maintenance).



Posting Reqs with Hidden Talent Gateway Questions

Talent Gateway questions that are hidden from a user type will in future be hidden **both** on the TG form and within 2xB when users of that type are adding questions for posting.

Date Available	US: 17/DEC/2009 EU: 23/DEC/2009
Product	☑ 2x BrassRing ☑ Talent Gateways
Visible Changes	☐ No – contact your CSC for implementation details. ☑ Yes – see the cumulative Visible Changes document sent out for each build in the release.
How Do I Get this Feature?	☑ Automatic with no configuration required. ☐ Specific conditions required – see details below. ☐ Configuration required – see details below.

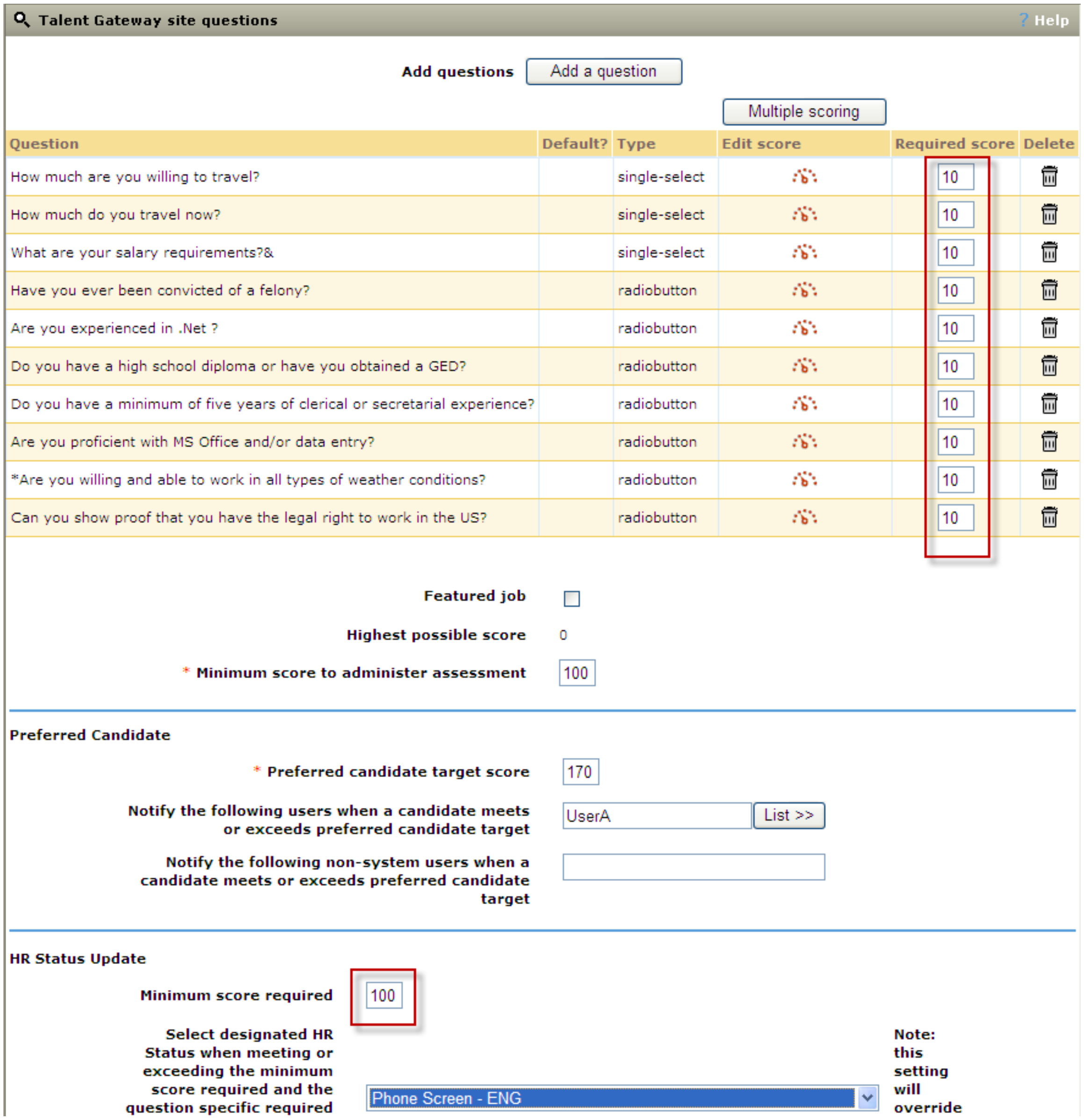
Benefits

Users no longer see questions to which they don't have access.

Feature Description

Talent Gateway questions that are hidden from a user type will in future be hidden **both** on the TG form and within 2xB when users of that type are adding questions for posting. For example:

UserA is a Recruiter user type posting Req1 in 2xB. He has access to 10 TG questions, and adds them (**Edit posting options > Edit site questions > Add a question**). He scores each question (**Edit score**), specifies 10 points each as the **Required score**, and enters a **Minimum score required** of 100.



UserB is a Recruiting Assistant user type with access to only 6 TG questions. UserB should adjust the **Minimum score required** to 60 (if each question's **Required score** remains 10 points).

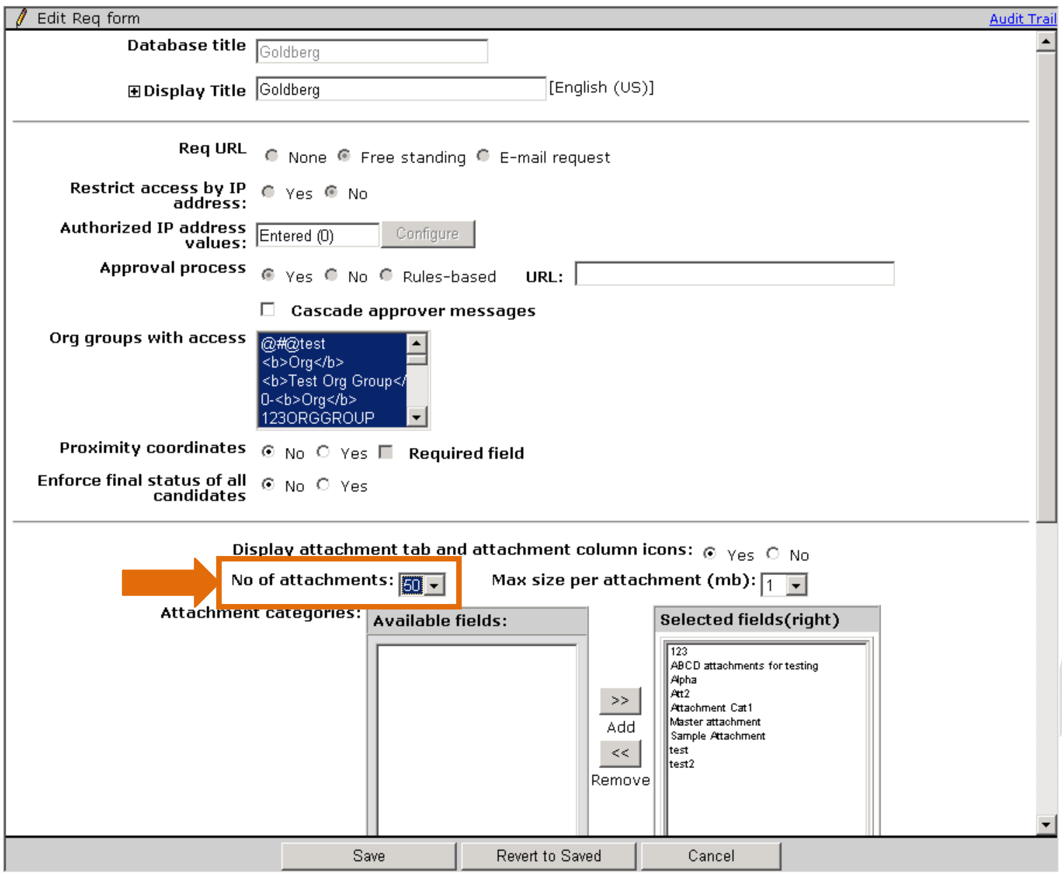
When UserB re-posts Req1, only the 6 TG questions to which he has access are posted (if he chose them all). The additional 4 that were previously posted by UserA are not posted since the Recruiting Assistant user type does not have access to those questions.

How Do Clients Get this Feature?

This feature is available automatically without configuration.

Req Forms Support Up to 50 Attachments

As of this release, your organization can configure its Req templates (also called “Req forms”) to support up to 50 attachments. Once configured this way, your 2x BrassRing users can upload up to 50 req attachments to requisitions. Previously, users could upload a maximum of 15 attachments.



Date Available	US: 22/APR/2010 EU: 28/APR/2010
Product	☑ Workbench ☑ Workbench Self-Service ☑ 2x BrassRing New UI ☑ 2X BrassRing
Visible Changes	☐ No – contact your CSC for implementation details. ☐ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☐ Specific conditions required – see details below. ☑ Configuration required – contact your CSC for more information.

Rules Automation Manager

The Rules Automation Manager is a tool for automating candidate flows within 2x BrassRing, providing both consistency and automation of processes.

Product	☑ Workbench ☑ New UI ☑ 2x BrassRing
Visible Changes	☑ No – contact your CSC for implementation details. ☐ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☑ Automatic – see details below. ☐ Specific conditions required – see details below. ☐ Configuration required – see details below.

Benefits

Consistency in hiring practices, flexibility in business processes, faster implementations at lower cost.

Feature Description

The Rules Automation Manager is being developed in phases. Overall, the tool will manage rules associated to an HR Status update or form insert/update. Rules will contain sets of conditions from which to check data, and perform various actions based on the conditions being met.

The Rules Automation Manager will be able to:

- Run a series of rules when a candidate gets to a specific HR Status or when a form is inserted or updated. Within a rule, the following functions are available:
  - Integrate with external system(s) using XML and Web Services.
  - Check for multiple conditions that exist or do not exist on candidate forms, req forms, or the Talent Record. Conditions include evaluating whether certain values are stored.
  - Run multiple actions based on rule's associated conditions being met. Actions include populating candidate form, req form, or Talent Record fields. They also include updating to a different HR Status and/or sending communications.
- Define multiple rules and sequence them for performing more complex condition and action scenarios.
- Define embedded rules.
- Delay execution of running the rules.
- Aggregate conditions using OR logic. Operations for the conditions include Blank, Not Blank, Contains, Not Contains, Greater Than, Less Than, Greater Than (# days), Less Than (# days).
- Compare conditions for more complex scenarios.

The tool will initially be used by Kenexa staff to define basic rules configuration, mostly confined to data existing within 2xB, with the potential for Workbench Self-Service configurations in future phases.

How Do Clients Get this Feature?

This feature is initially for Kenexa internal use. Please contact your CSC for more information.

HTML Error Messages

To help users deal with the security policies for HTML usage in text areas in 2x BrassRing, Workbench, Talent Gateways, and Agency Manager, these modules display the following error message when users are working with text areas that support HTML.

Feature Summary Grid

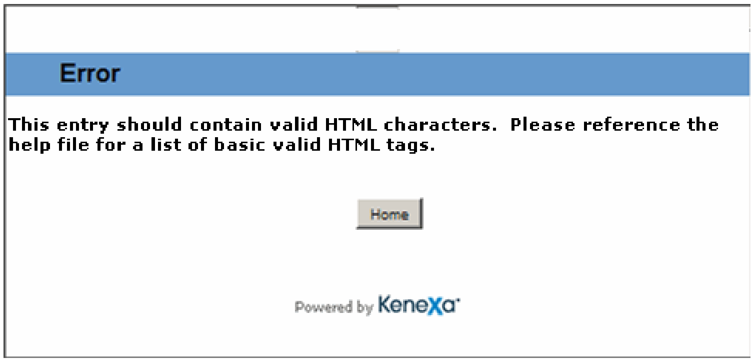
Date Available	US: 11/Mar/2010 EU: 17/Mar/2010
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☑ Workbench ☑ Workbench Self-Service ☐ 2x BrassRing Administration ☑ 2x BrassRing [New UI] ☑ 2x BrassRing [Classic] ☑ Talent Gateways ☑ Gateway Questionnaire ☑ Agency Manager ☐ Data Insight Tool ☐ 2x SmartApproval ☐ 2x Onboard
Visible Changes	☐ No – contact your CSC for implementation details. ☑ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☑ Automatic – see details below. ☐ Specific conditions required – see details below. ☐ Configuration required – contact your CSC for details.

Benefits

This feature supports the overall drive to ensure that 2x BrassRing products are as as secure as possible. It directs users to more information for populating text area fields with html that will work for them.

Feature Description

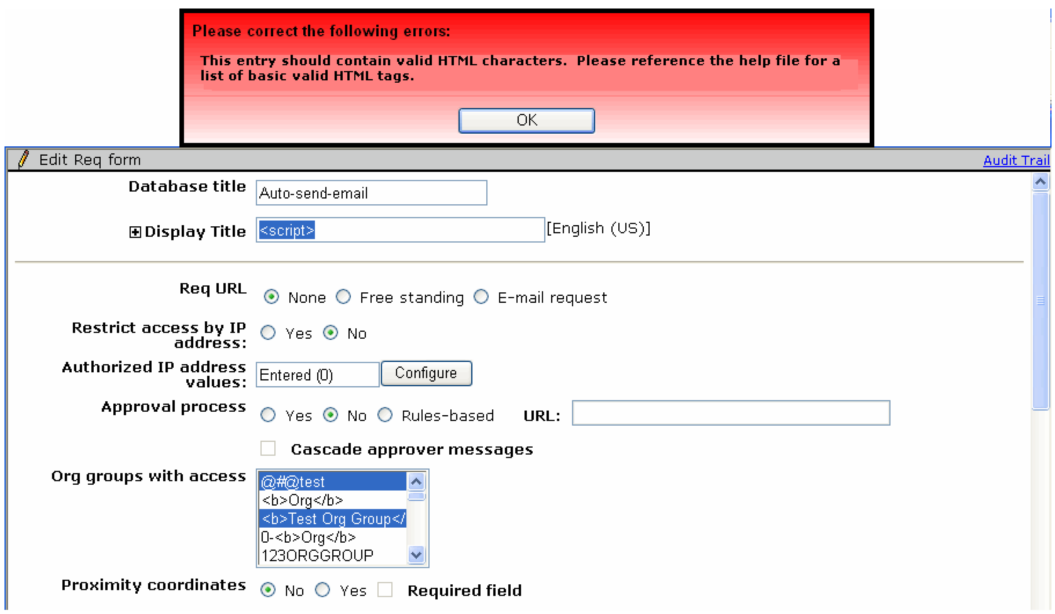
Users see the following error message when working in text area fields that support HTML in 2x BrassRing, Talent Gateways, and Agency Managers.



Each product uses the existing HTML validation rules. To render properly, HTML tags must be valid (according to the criteria of the validation rules) and well-formed. Validation is applied at the field level. The validation rules are updated continuously. Users are directed for assistance to a new section in the relevant help files called, “HTML Guidelines.”

Workbench

Users see the following error message in Workbench:



Help Content

A section entitled, “HTML Guidelines” (see the section immediately following this one) is included in the following places in the documentation:

- 2x BrassRing users working in text area fields throughout the product can access page-level Help for the Candidates, Reqs, and Admin modules in 2x BrassRing.
- Certified Workbench users (all tiers) customizing text area fields for Talent Gateways can access the online Help for Workbench from the global Help link in the top right corner of Workbench.

- Agency Manager users who use the “Cut and Paste” method for submitting a resume to an Agency Manager can access module-level Help from the page-level Help link.
- Talent Gateway users who use the “Cut and Paste” method for submitting a resume to a Talent Gateway can access module-level Help from the page-level Help link.

HTML Guidelines

Due to security requirements, we cannot provide the list of permitted HTML tags. However, most errors are due to the incorrect use of common HTML tags.

Here are some very general guidelines:

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

```
<p>This is the <b>bold</b> tag.</p>
<p>This is the <i>italic</i> tag. </p>
<h1>Heading Level 1</h1>
<h2>Heading Level 2</h2>
<h3>Heading Level 3</h3>
```

Best Practice Recommendations

Follow the recommendations in the “*HTML Guidelines*” section included above.

How Do Clients Get this Feature?

This is automatically available to all clients.

Workbench – Login Security Questions for Forgotten and Expired Passwords

All new and existing Workbench users will be prompted to select, answer, and save a login security question when logging in to Workbench on or after March 8th in the United States and March 15th in the European Union. The login security question is used in the “forgot password” and “expired password” workflows. Login security questions and answers are encrypted.

Important: The Login Security Question feature is turned on in Workbench by default.

Note: The Login Security Question feature is available to be turned on for KRB, Agency Managers, and Talent Gateways. Please see the feature write-up, “*Login Security Question Feature for KRB, AM, and TG*” for more information.

Date Available	US: 08/Mar/2010 EU: 15/Mar/2010
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product or Module	☑ Workbench ☑ Workbench – Clients ☐ 2X BrassRing - New UI ☐ 2X BrassRing - Classic ☐ Talent Gateways ☐ Agency Manager ☐ Data Insight Tool ☐ SmartApproval
Visible Changes	☐ No – contact your CSC for implementation details. ☑ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☑ Automatic – see details below. ☐ Specific conditions required – see details below. ☐ Configuration required – contact your CSC for details.

Benefits

Adding login security questions and answers (both of which are encrypted) provides an additional hurdle for unauthorized users who are trying to access the system.

Feature Description

Workbench users must select a security question to be used in the “forgot password” and “expired password” workflows. The Workbench user’s workflow changes as follows:

- **For new accounts:** Users creating new accounts for the first time on or after the dates that the feature goes to Staging are prompted to select a login security question and provide the answer.

- **For existing accounts:** Users logging into Workbench on or after the dates that this feature goes to Staging are prompted to select a login security question and provide the answer before they can log in.

Once the login security question is selected, it is used to authenticate the user's ID when he or she tries to create a new password for expired passwords and as a result of clicking the "forgot password" workflow.

All Workbench users can manage their own security questions. See page 3 for more information.

[**Internal Use Only:** Workbench users of the Workbench user types of Superuser and Help Desk can clear security questions for users. See page 4 for more information.]

Workbench Workflows

New User Login – Must Select Question and Change Password

When new users log in for the first time after the Staging and Production dates for their region , they are prompted to select a security question and change their password.

Existing User Login – Must Select Question

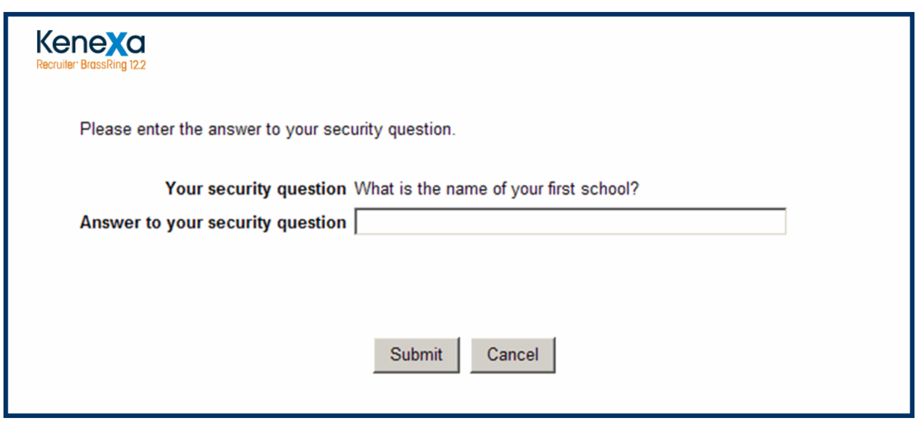
When existing users log in for the first time after the Staging and Production dates for their region, they are prompted to select a security question. If their password has expired, they are also prompted to reset their password.

Forgot Password – No Security Question Selected

When Workbench users click the **Forgot your password?** link, users are prompted to select a security question before they can reset their passwords. In this workflow, the system asks users to enter their old password to validate each user's identity.

Forget Password – Security Question Selected

When Workbench users click the **Forgot your password?** link, the system sends the password recovery email to the user. The user clicks the link contained within the email to reset his or her password. The system determines that the user has selected a security question and displays the **Answer Security question** page, shown below.



The user answers the question successfully and is redirected to the password reset page, shown below.

The user follows the guidelines to change his or her password and submits it. The confirmation page displays.

Expired Password Workflows

When Workbench users try to login and their password has expired, they are redirected to the password reset page, as shown in the previous screen capture. To validate the user, the system asks the user to enter the expired password.

If the system determines that the user has not selected a security question, the user is redirected to the **Create a security question** page. The user selects a security question, enters the answer and submits them. The Workbench login page displays.

[Internal Use Only]

Clearing Other Users' Security Questions

Workbench Superusers and Help Desk users can clear security questions for one or multiple users.

Path: **Workbench > Admin > Administer users > Clear security questions** on **Administer users** page.

To clear security questions:

1. Select or search for and select one or more users whose security questions you want to clear and click **Clear security questions**. If you do not select at least one user and click the link, an error message displays.
2. Once you have selected one or more users and clicked the link, the system asks you to confirm that you want to clear the security questions for the slected user(s). Click **OK** to confirm, or click **Cancel** to exit without making any changes.
3. When you click **OK**, the security question(s) selected and stored answers to those questions are cleared and the following message displays: "*Security questions have been cleared successfully.*"

Sequential Form Approval – Resending to Pending Approver

For sequential form approvals, 2x BrassRing users can now re-send a candidate form approval request eLink to the next pending approver, without interrupting the approval process.

Date Available	US: 22/APR/2010 EU: 28/APR/2010
Product	☐ Workbench Self-Service ☐ New UI ☑ 2x BrassRing ☐ Talent Gateways ☐ Agency Manager ☐ Data Insight Tool ☐ SmartApproval
Visible Changes	☐ No – contact your CSC for implementation details. ☑ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☑ Automatic – see details below. ☐ Specific conditions required – see details below. ☐ Configuration required – see details below.

Benefits

Allows users a convenient way to resend an approval request.

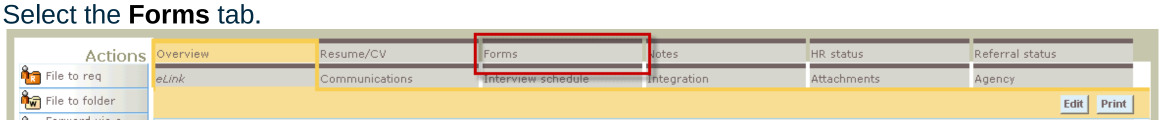
Feature Description

For sequential form approvals, the 2xB users KRB users with privileges to view a candidate form can re-send the eLink requesting form approval to the next pending approver. This is helpful when the original eLink is accidentally deleted or not responded to for some other reason. The **View form** page has a new **Route to next pending approver** button to get the process going again. The approval process continues with the pending approver and proceeds from there without interruption.

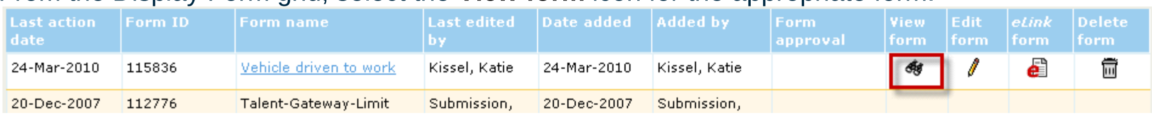
Routing to the Next Approver in 2xB

When a candidate form is stalled in the approval process, 2xB users can route the approval request to the next pending approver by following these steps.

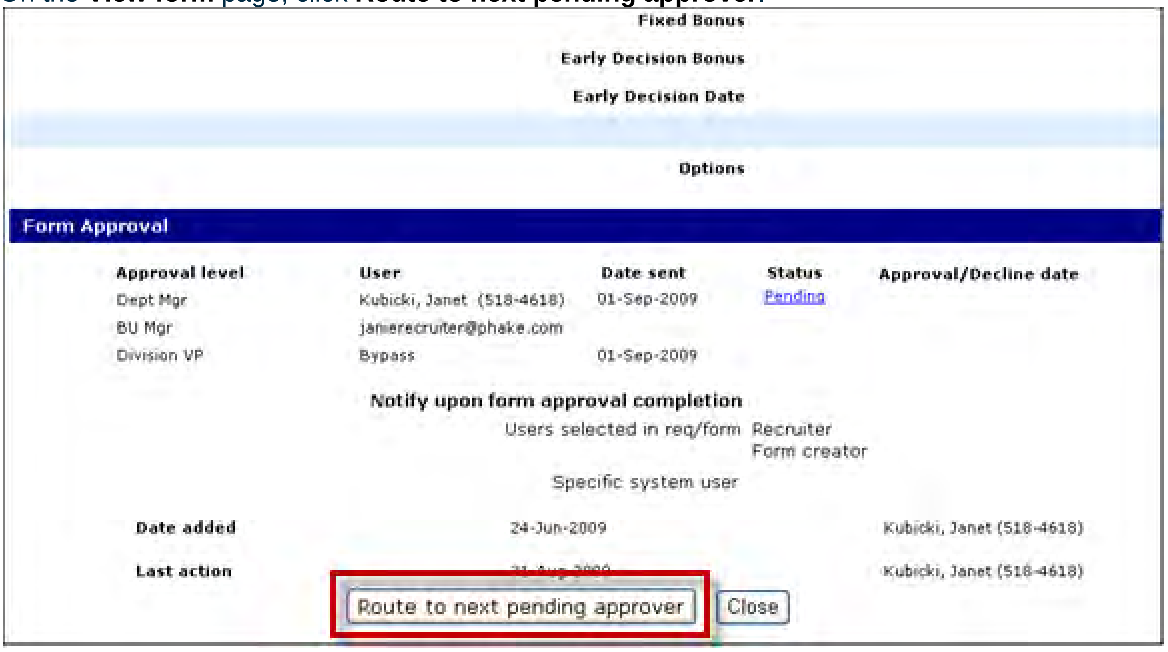
1. Click the name link of the candidate whose candidate form approval must be re-sent. (You can select from the candidates attached to a req in a req folder.) The candidate's Talent Record displays.
2. Select the **Forms** tab.



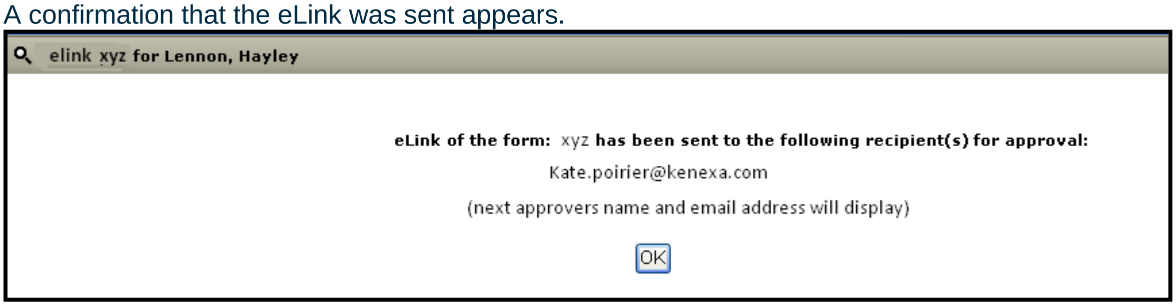
3. From the Display Form grid, select the **View form** icon for the appropriate form.



4. On the **View form** page, click **Route to next pending approver**.



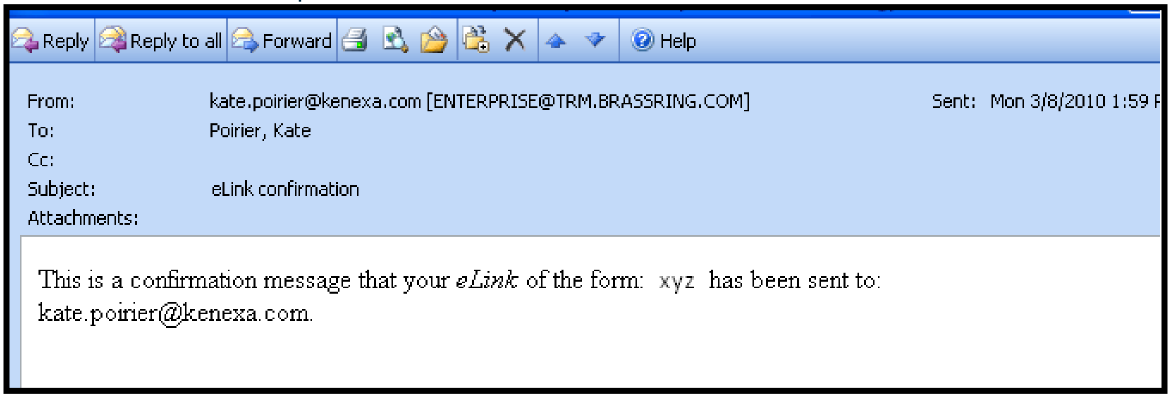
5. A confirmation that the eLink was sent appears.



Both name and email address of the next approver display on the confirmation when that person is a not a system user; only name displays when the next approver is a 2xB user.

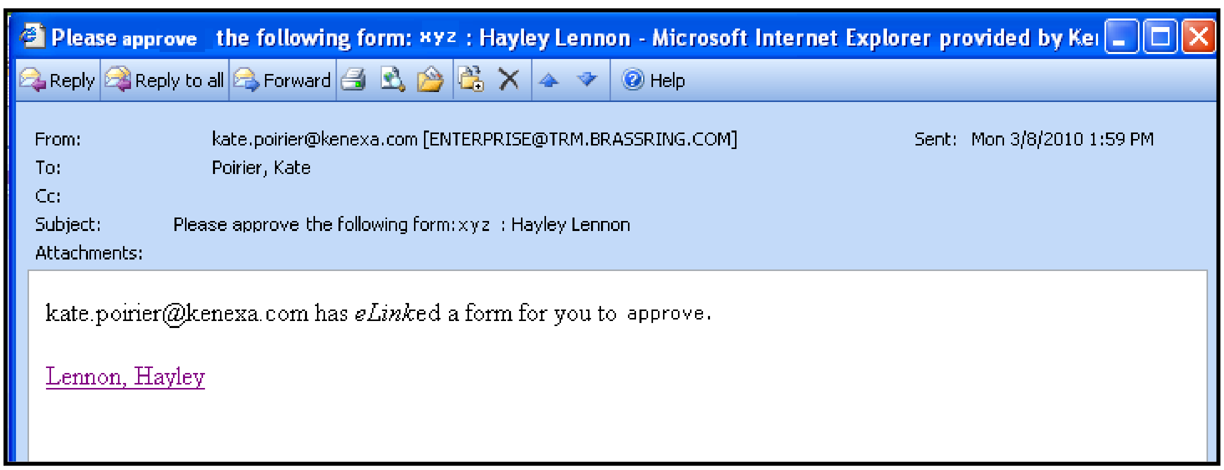
6. Click **OK** to close the confirmation.

You will also receive a separate email confirmation.

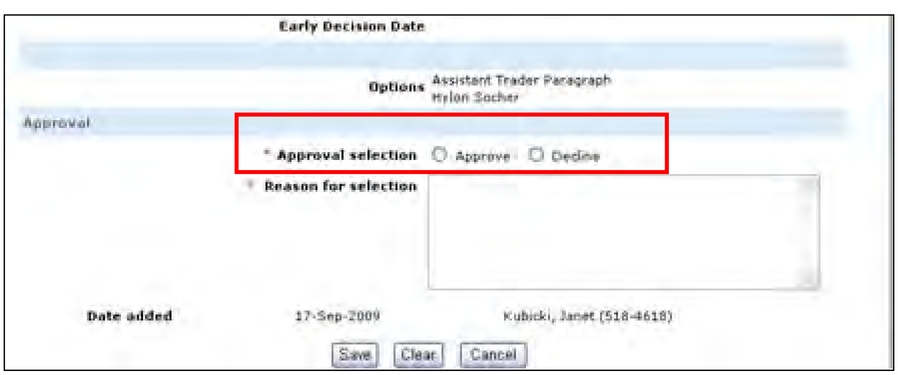


Note: Route to next pending approver functionality is available only when an approval request is stalled because the next approver has not taken any action. If the form's approval list changes, the approval process needs to start over. Likewise, once the form has been routed for approval, any edits to the form reset all approval statuses and the form must be re-initiated for approval.

Nothing has changed about the Candidate Form approval eLink sent to the "next approver." The next approver receives an elink with a hyperlink to a candidate form.



The form displays to the recipient as it does today, and the next approver has the option to approve or decline the form before clicking **Save** to complete the transaction.



Limitations and Known Issues

The process of resending a candidate form for approval is a manual process that needs to be initiated by an authorized user.

How Do Clients Get this Feature?

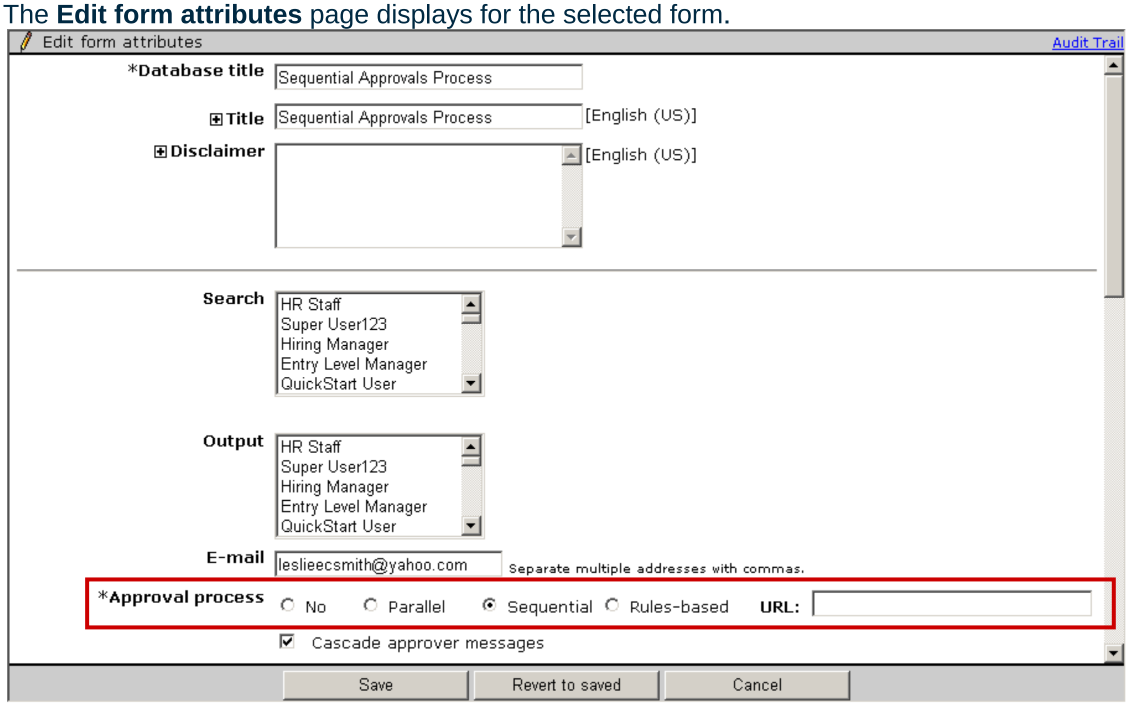
This feature is available automatically without configuration for any candidate forms using the **Sequential** approval process (setting this in Workbench is described below).

Workbench Self-Service

Who does this: Certified Workbench User, all tiers

Your Kenexa consultant or Certified Workbench user can configure candidate forms to use the Sequential approval process.

1. In Workbench, select **Tools > Forms > Candidate forms**.
7. On the **Candidate forms** page, click the pencil icon in the **Edit form attributes** column for the form. The **Edit form attributes** page displays for the selected form.



8. In the **Approval process** field, select **Sequential**. To include all previous Approver messages, check **Cascade approver messages**.
9. Configure the rest of the settings on this form as necessary and click **Save**.

SmartApproval: First Match Business Rule Action

A new SmartApproval Business Rule action called **Insert first match of a role** now appears on the Possible Actions list when users add or edit business rules. The new action allows the system to search your hierarchical organization structure for the “first match” when routing approvals—skipping the creator of the req if the creator is the first match found in the specified approval role. This prevents users from being asked to approve their own requisitions. In the case of candidate forms, it also skips the creator of the req (to which the form is attached) if the creator is the first match found.

Date Available	US: 19/NOV/09 EU: 26/NOV/09
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☐ Workbench Self-Service ☐ New UI ☐ 2x BrassRing ☐ Talent Gateways ☐ Agency Manager ☐ Data Insight Tool ☑ SmartApproval
Visible Changes	☐ No – contact your CSC for implementation details. ☑ Yes – see the cumulative Visible Changes document sent out for each build in the release.
How Do I Get this Feature?	☑ Automatic – see details below. ☐ Specific conditions required – see details below. ☐ Configuration required – see details below.

Benefits

Provides additional tuning to the approval process

Feature Description

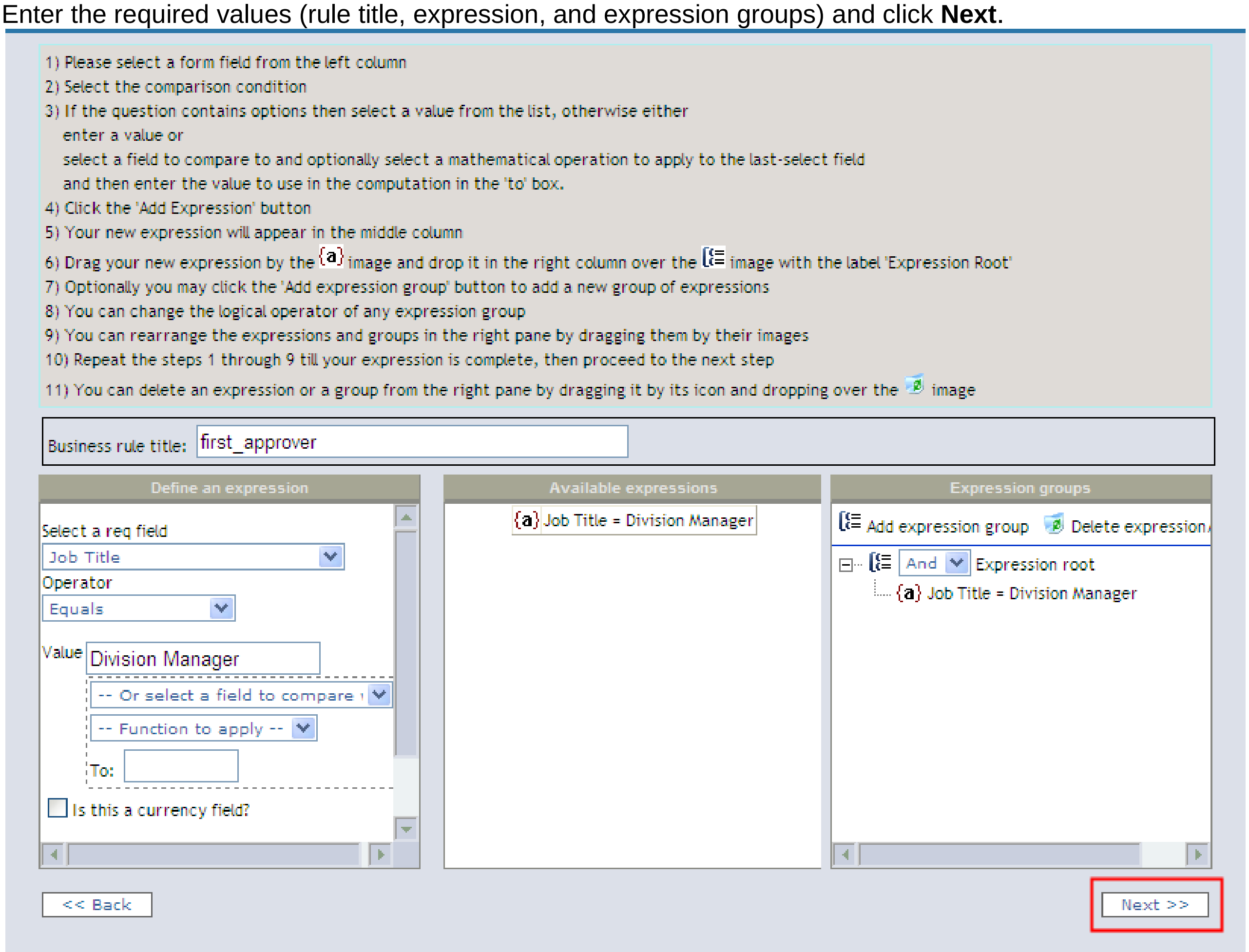
A new SmartApproval Business Rule action called **Insert first match of a role** now appears on the Possible Actions list when users add or edit business rules. The new action allows the system to search your hierarchical organization structure for the “first match” when routing approvals—skipping the creator of the req if the creator is the first match found in the specified approval role. This prevents users from being asked to approve their own requisitions. In the case of candidate forms, it also skips the creator of the req (to which the form is attached) if the creator is the first match found.

To use the new rule action in SmartApproval:

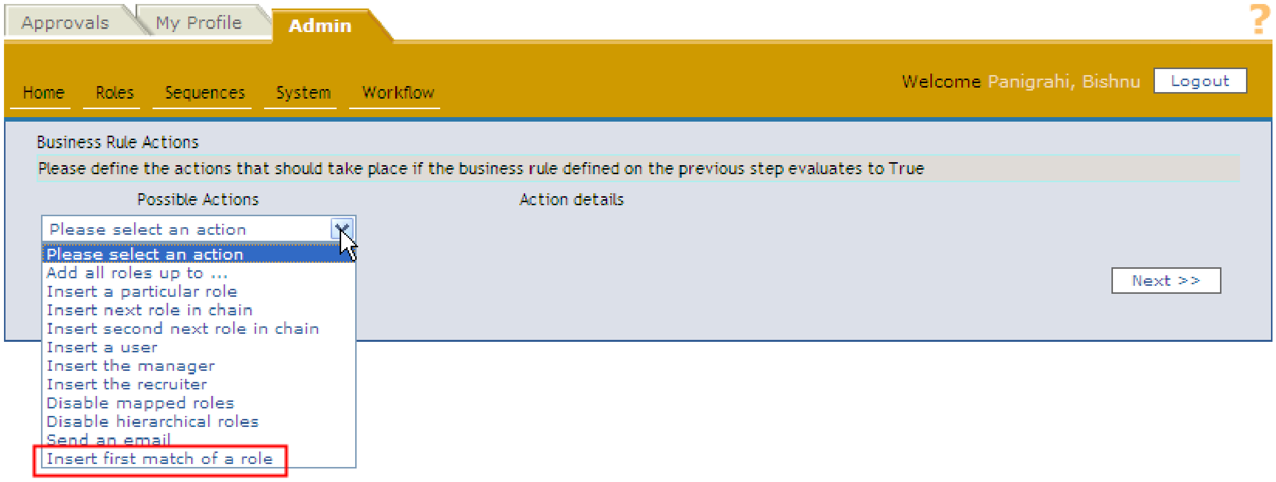
1. Select **Add/Edit/Delete Business Rule** from the Workflow menu on the Admin tab..
2. Select the Workflow type from the drop-down list.

3. Click the **Add Business Rule** icon.

4. Select **Req** or **Form** from the drop down list, and click **Next**.
5. Enter the required values (rule title, expression, and expression groups) and click **Next**.

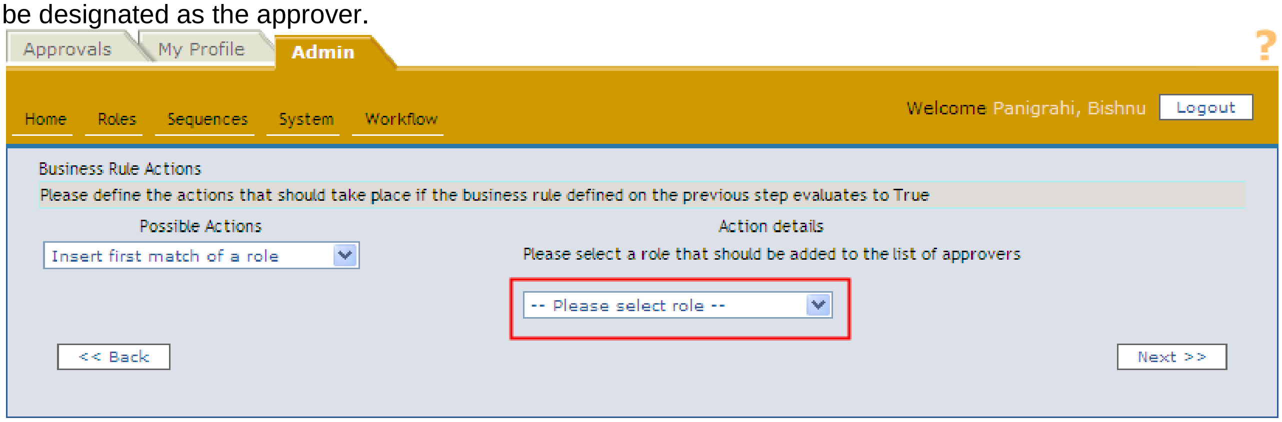


6. Select **Insert first match of a role** from the Possible Actions list.



When you select **Insert first match of a role**, an Action details list is populated with the organization's configured roles.

7. From the Action details list, select the role in the hierarchy structure for which the first match should be designated as the approver.



8. Click **Next** to create the Business Rule.

The following scenarios illustrate how the **Insert first match of a role** business rule action is evaluated for SmartApproval. In these scenarios Division Manager is specified as the role to match (example shown in the preceding steps).

Scenario 1: Req Creator, who is **not** a division manager or approver at a higher level, creates a req. SmartApproval searches up the organizational tree until it locates Division Manager, the first division manager match, and thus an approver. The req is routed to Division Manager for approval.

Scenario 2: Req Creator, who **is** a division manager and the hiring manager of the req, creates a req. SmartApproval skips Req Creator because he created the req and searches up the organizational tree until it locates Division Manager, the first match in an approver role found above Req Creator in the hierarchy. The req is routed to Division Manager for approval.

The following table describes all possible actions of a SmartApproval business rule.

Action	**Description**

Add all roles up to…	Adds to the approval list all roles up to the role you select. SmartApproval moves up the organizational tree by comparing the current approver’s functional title against the Role Ranking. For example, suppose you pick the role Manager. If there are several levels of Manager roles, the system moves through the organization until it reaches the next level of functional role (Director), then inserts approvers with the highest-ranking Manager being the highest-ranking approver in the list.
Insert next role in chain	Automatically chooses the role that is the next level up from the Hiring Manager.
Insert second next role in chain	Automatically chooses the role that is two levels up from the Hiring Manager.
Insert a user	Inserts the 2xB user you select.
Insert the manager	Inserts the manager from the requisition's STANDARD Manager field
Insert the recruiter	Inserts the recruiter from the requisition's STANDARD Recruiter field
Disable mapped roles	You might want to disable mapped roles and use only hierarchical roles if, for example, approval for offers with salaries of less than $50,000 do not require the approval of any financial functional roles. A Role Mapping identifies several financial functional roles for the organizational unit combination Company = Acme, Business Units = ALL, and Departments = ALL. If an offer has a salary of $45,000, these functional roles are not required; approval by the organizational hierarchy is sufficient.
Disable hierarchical roles	You might want to disable hierarchical roles and use only mapped roles if, for example, the custom requisition field requisition Type = Executive
Insert first match of a role	Inserts the first match of the role you specify. This action excludes the req creator, so if the creator is the first match, SmartApproval will skip the creator and search up the organizational tree.

How Do Clients Get this Feature?

This feature is available automatically without configuration.

Talent Gateway: Custom Code Labeling per TG

You can now have customized labels for Job Code, Job Req Code, and Source Code on a per-Talent Gateway basis, to provide more flexibility for Full and Basis TGs.

Date Available	US: 17/DEC/09 EU: 23/DEC/09
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☑ Workbench Self-Service ☐ New UI ☐ 2x BrassRing ☑ Talent Gateways ☐ Agency Manager ☐ Data Insight Tool ☐ SmartApproval
Visible Changes	☑ No – contact your CSC for implementation details. ☐ Yes – see the cumulative Visible Changes document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☐ Specific conditions required – see details below. ☑ Configuration required – see details below.

Benefits

Customized Source Code, Job Code, and Job Req Code labels for each Talent Gateway provide more flexibility in messaging to your end-users.

Feature Description

This feature provides another level of customization of the Source Code, Job Code, and Job Req Code labels, as well as labels for your custom codes, that candidates see when applying through Talent Gateways. Custom code labels can be added for individual full or basic Talent Gateways, and are automatically applied to any GQ (that uses the widget for code fields) posted to the TG.

Levels of customization already available include the ability to:

- Apply custom source codes, job codes, and job req codes across the board to all your TGs. (Customization provided by Kenexa staff.)
- Apply custom code labels to Gateway Questionnaires, regardless of what TG they are posted to, using the code widget. (Customization provided using Workbench self-service tool.)

How Do Clients Get this Feature?

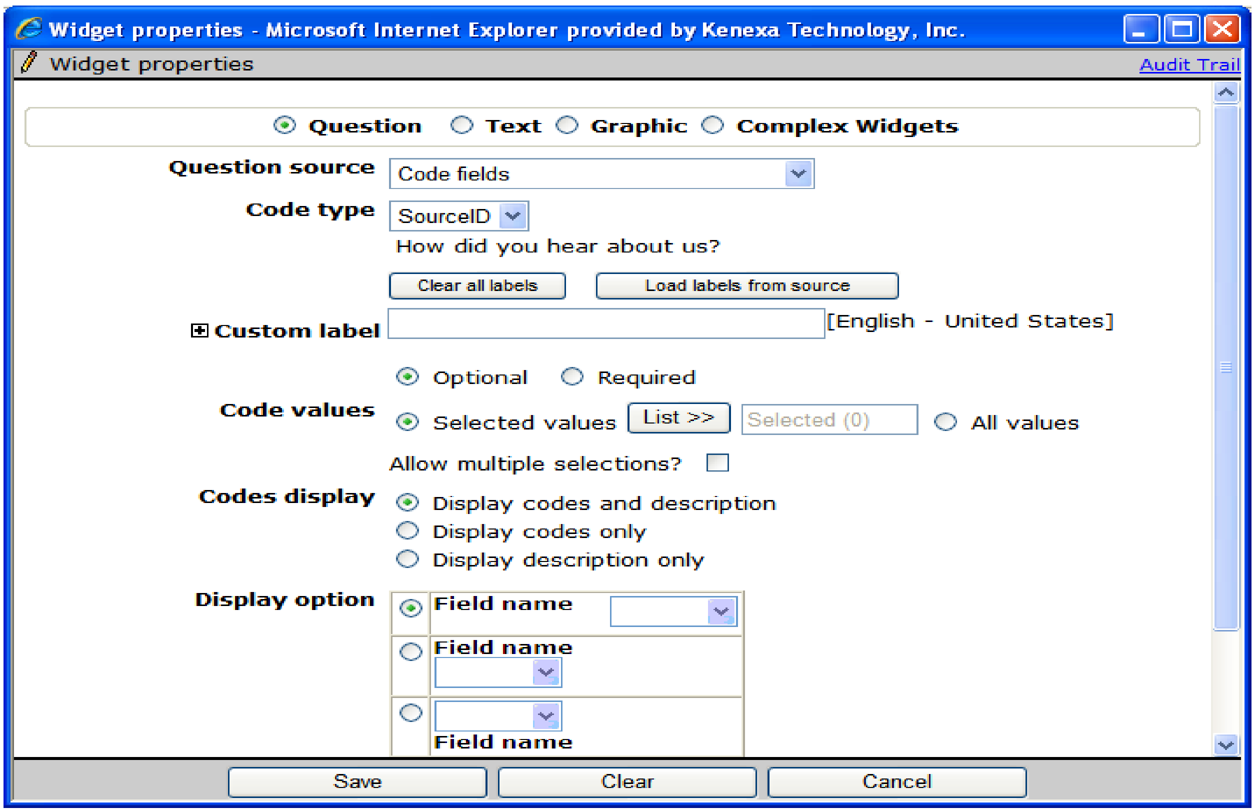
This feature is controlled by custom code labels added for you by Kenexa staff via Talent Gateway Administration in Workbench. Please contact your CSC for more information.

Workbench Self-Service

Who does this: Certified Workbench User, all Tiers

Certified WB users can apply custom code labels to Gateway Questionnaires, regardless of what TG they are posted to, using the code widget. (This is existing functionality.) To do so:

1. In WB, select **Gateway Questionnaires > Administer sections/pages > Administer widgets**.
2. On the **Widget properties** page, select: **Question Code**, then **Code fields** for Question source.
3. Select Code type: **SourceID** or **JobCode** or **JobReq**, and enter your Custom label in the field provided.



Contact your CSC for assistance in customizing code labels for all or for specific Talent Gateways.

Controlled Use of HTML Tags in TGs and GQs

Kenexa is always working to make 2x BrassRing more flexible while maintaining the highest level of security. This feature introduces the ability for clients to control the use of HTML tags more precisely in your Talent Gateway and Gateway Questionnaire text customization fields.

Feature Summary Grid

Date Available	US: 11/Mar/2010 EU: 17/Mar/2010
Cost	☑ No additional cost ☐ Additional cost – contact your CSC for details.
Product	☑ Workbench Self-Service ☐ 2x BrassRing New UI ☐ 2x BrassRing ☑ Talent Gateways ☑ Gateway Questionnaire ☐ Agency Manager ☐ Data Insight Tool ☐ 2x SmartApproval ☐ 2x Onboard
Visible Changes	☑ No – contact your CSC for implementation details. ☐ Yes – see the cumulative *Visible Changes* document sent out for each build in the release.
How Do I Get this Feature?	☐ Automatic – see details below. ☐ Specific conditions required – see details below. ☑ Configuration required – contact your CSC for details.

Benefits

Clients can choose to allow or not allow HTML tags to be used in text customization fields used for branding on Talent Gateways and in Gateway Questionnaires.

Feature Description

Talent Gateways and Agency Managers are both highly customizable, with many text area fields supporting the use of HTML. 2X BrassRing validates HTML configured in customizable text area fields in Workbench and displayed in Talent Gateways and Gateway Questionnaires.

As a result of this enhancement, clients can elect to enable a new client setting that allows them to use excluded HTML tags in their TG and GQ text customization fields. This capability affects a limited subset of customizable text area fields in Workbench used to do extensive branding on Talent Gateways and in Gateway Questionnaires.

Best Practice Recommendations

NA

Limitations and Known Issues

NA

How Do Clients Get this Feature?

Please contact your CSC for help with this feature.

Workbench Self-Service

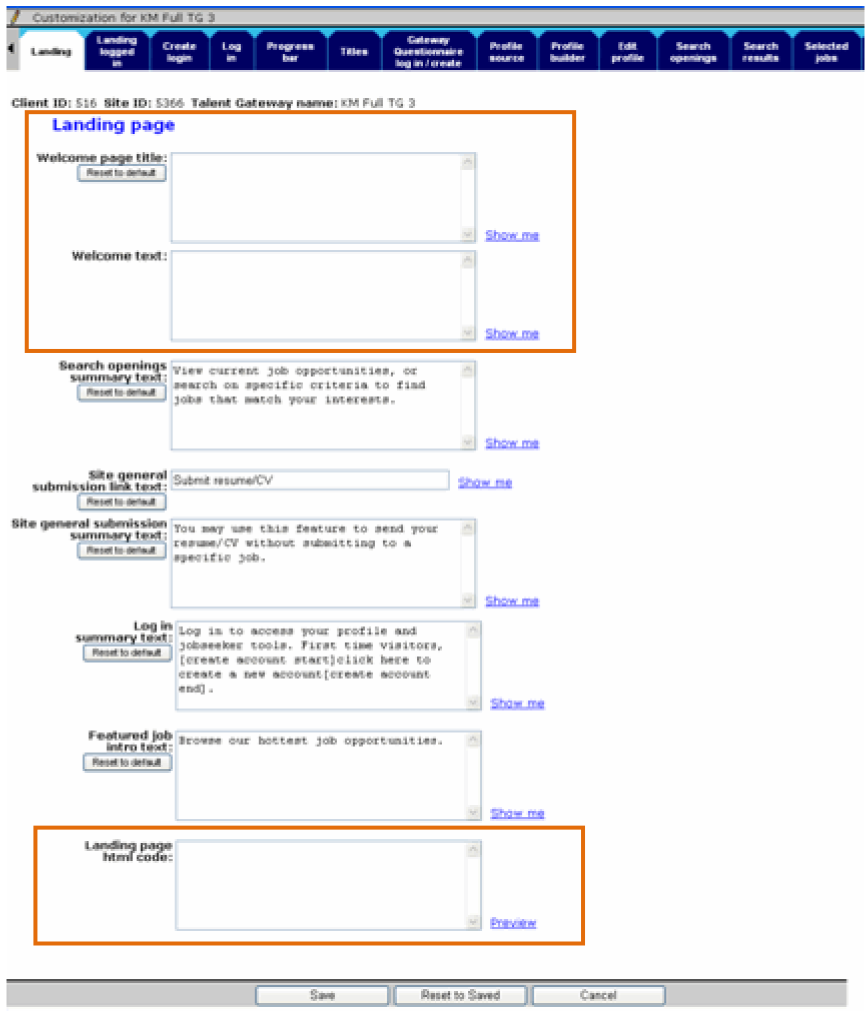
Who does this: Certified Workbench User, Tier 2

Talent Gateway Landing Page

Path: Workbench > Tools > Talent Gateways > Text customization > Edit a TG > Landing tab

The following text area fields support restricted HTML:

- Welcome page title
- Welcome text
- Landing page html code

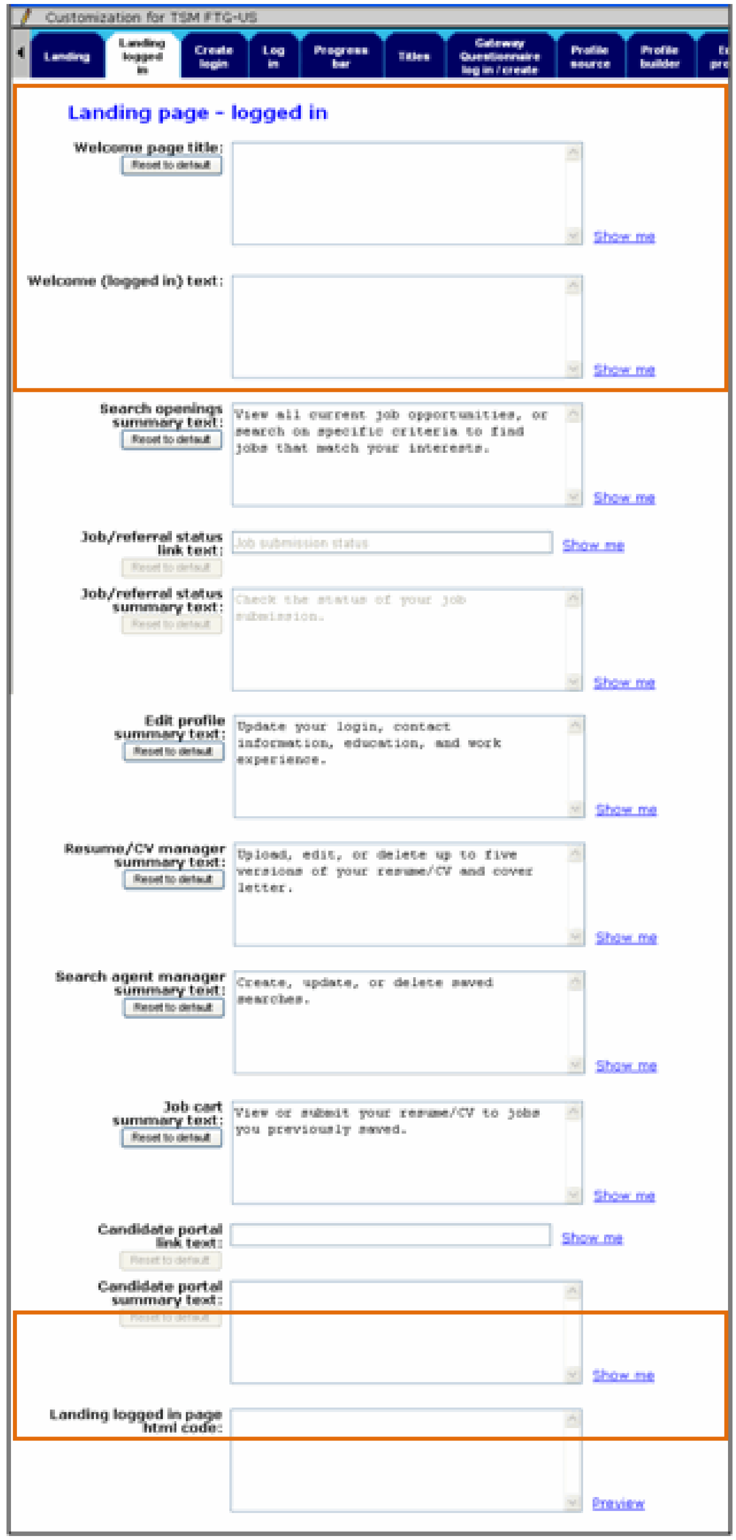


Talent Gateway Landing logged in Page

Path: Workbench > Tools > Talent Gateways > Text customization > Edit a TG > Landing tab

The following text area fields support restricted HTML:

- Welcome page title
- Welcome text
- Landing logged in page html code

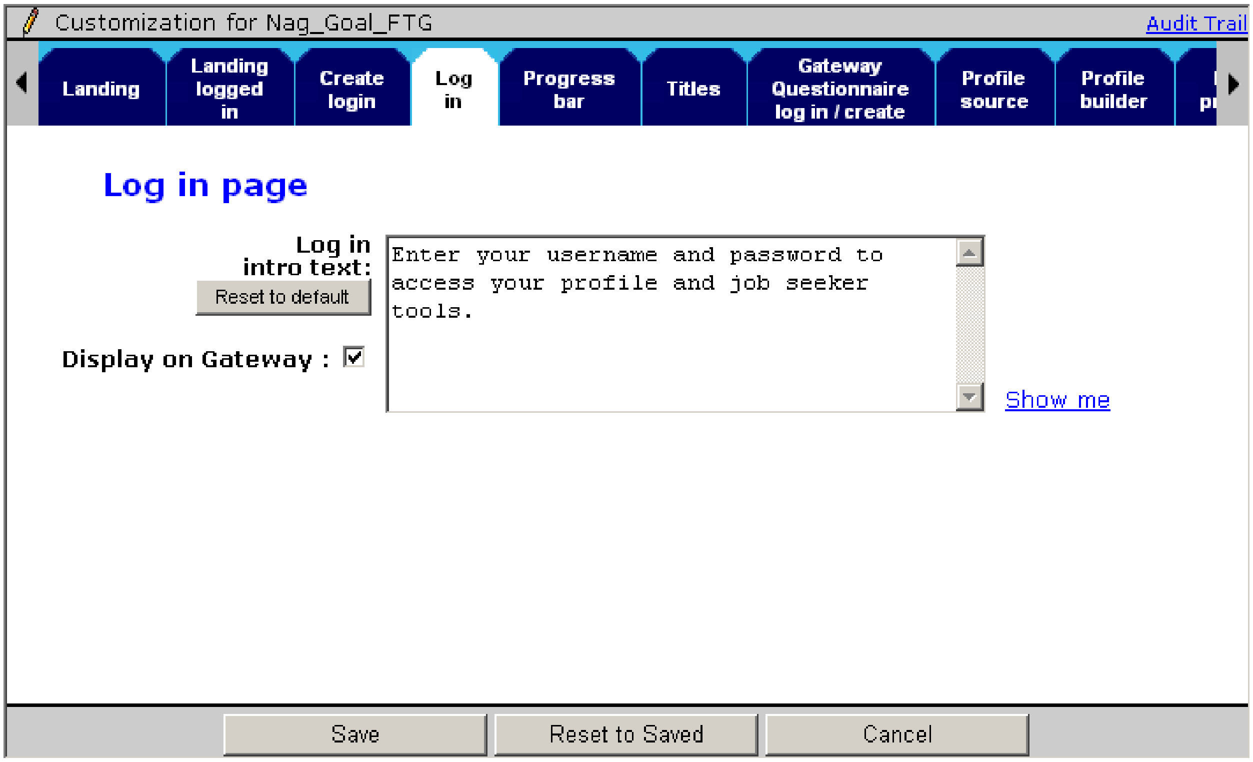


Talent Gateway Log in Page

Path: Workbench > Tools > Talent Gateways > Text customization > Edit a TG > Log in tab

The following text area field supports restricted HTML:

- Log in intro text



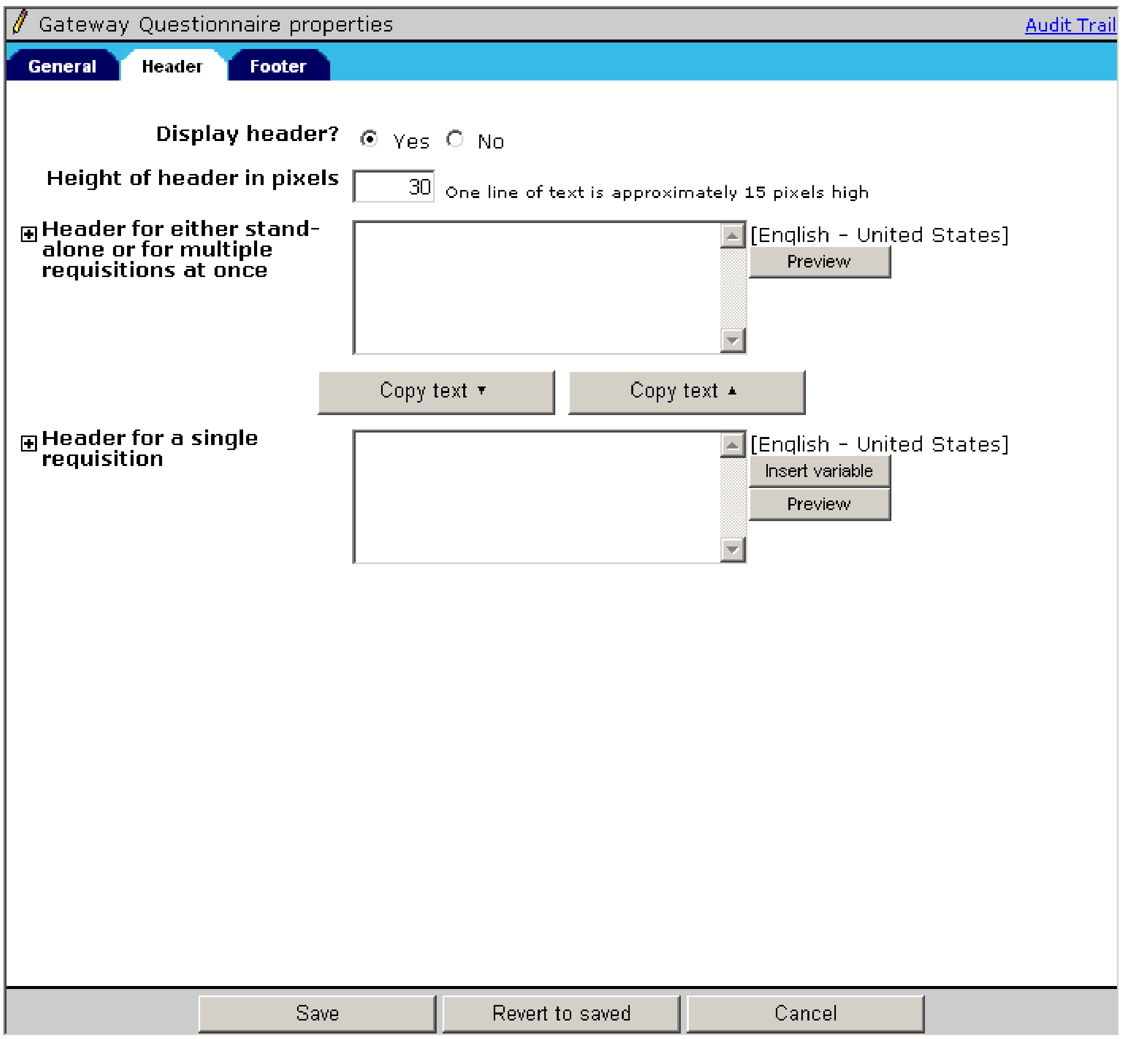
Gateway Questionnaire

GQ Header

Path: Workbench > Tools > Gateway Questionnaire > select a Gateway Questionnaire > Add or edit a Gateway Questionnaire properties > Header tab

The following text area fields support restricted HTML:

- Height of header in pixels
- Header for either stand-alone or for multiple requisitions at once
- Header for a single requisition

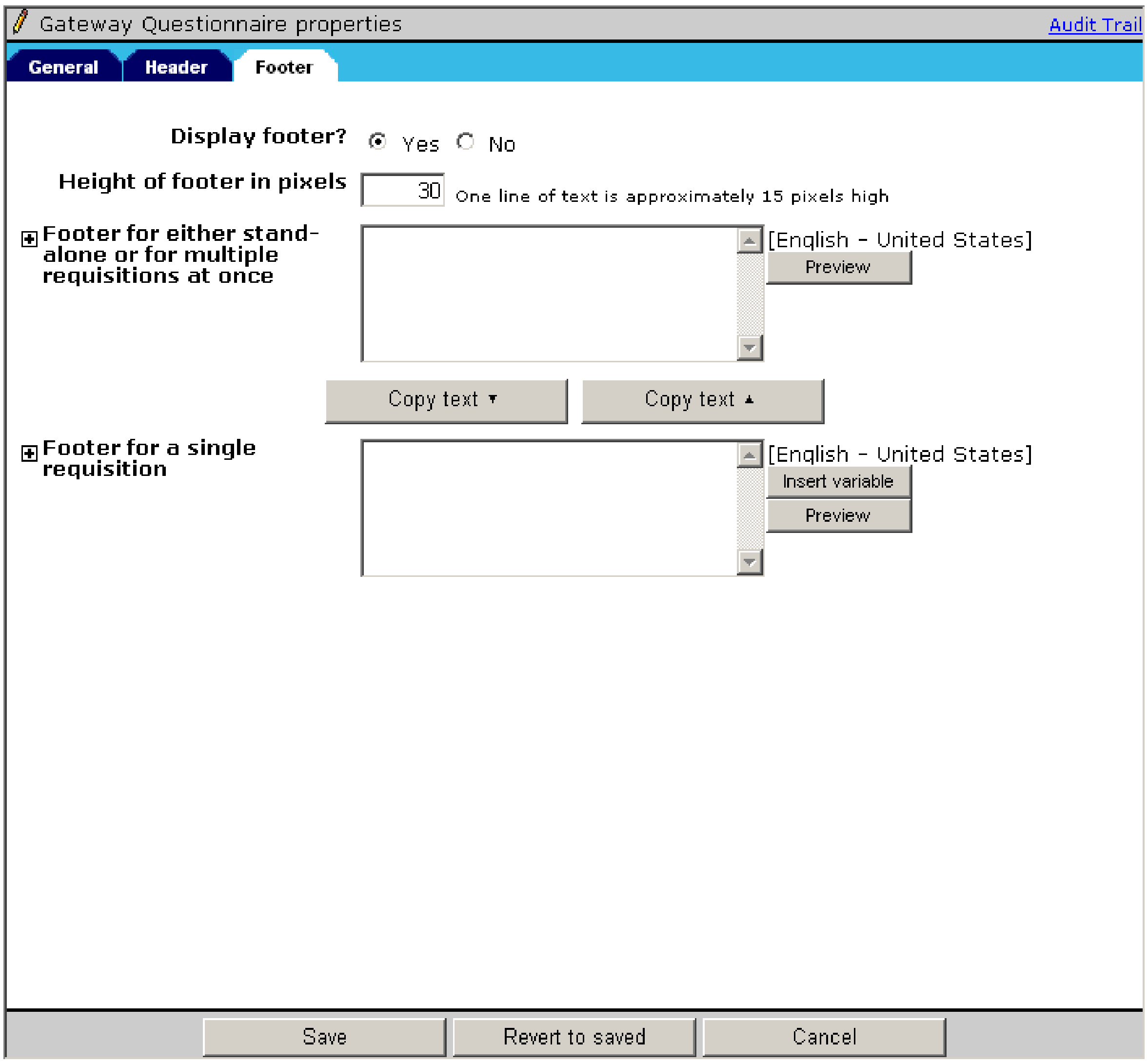


GQ Footer Tab

Path: Workbench > Tools > Gateway Questionnaire > select a Gateway Questionnaire > Add or edit a Gateway Questionnaire properties > Footer tab

The following text area fields support restricted HTML:

- Height of header in pixels
- Footer for either stand-alone or for multiple requisitions at once
- Footer for a single requisition

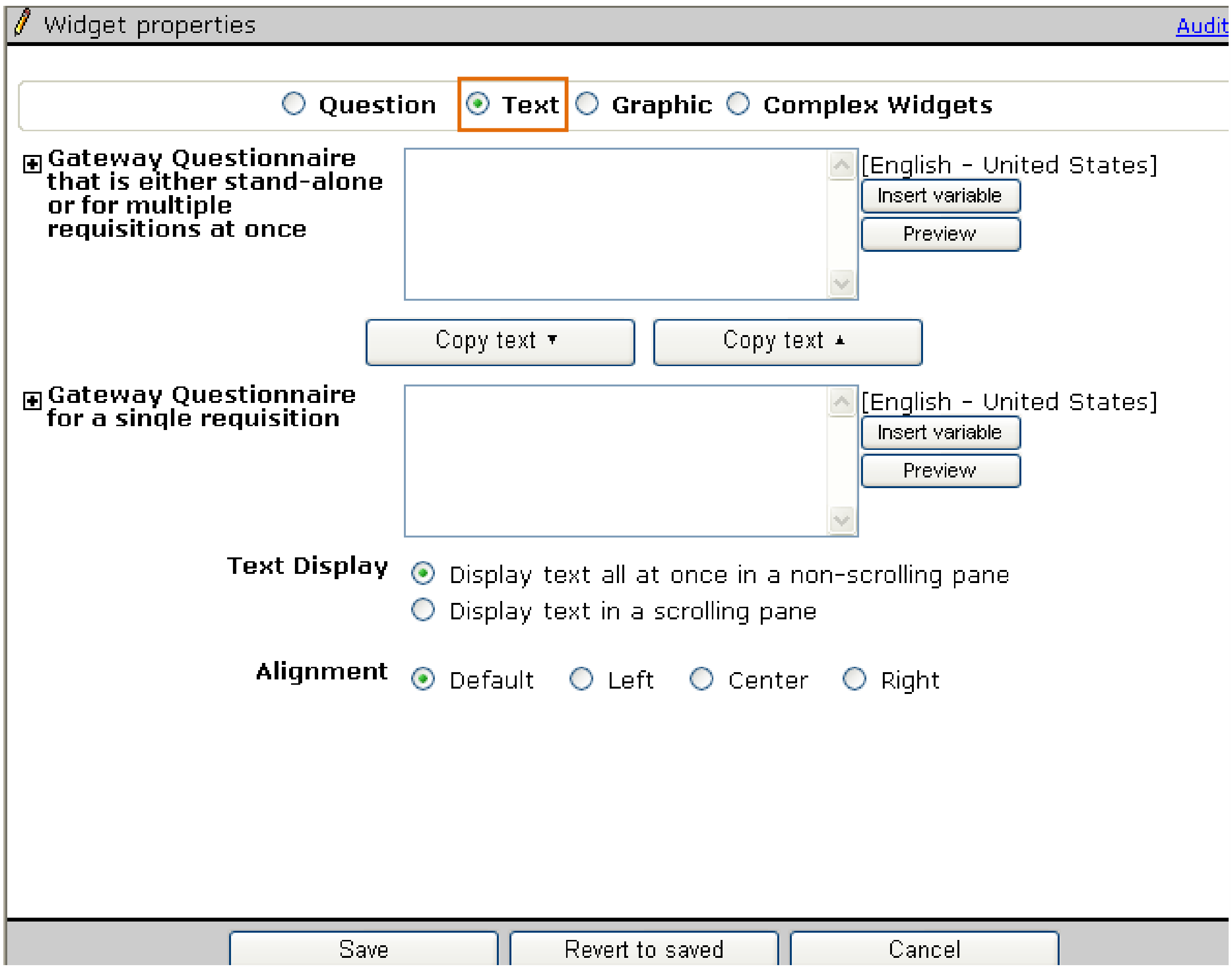


Widget properties Page

Path: Workbench > Tools > Gateway Questionnaire > select a Gateway Questionnaire > Add or edit a Gateway Questionnaire properties > Administer sections/pages > Administer widgets > Add or Edit widget

The following text area fields support restricted HTML:

- Gateway Questionnaire that is either stand-alone or for multiple requisitions at once
- Gateway Questionnaire for a single requisition



Audit Trail

This changes made to the settings described above are logged in Workbench's Audit Trail.