KenexaRecruiter® BrassRing and Talent Gateway Solutions

Product Update Guide

Release 10.0

FINAL

Release Date: 01 December 2008

Contents

Enhanced List Administration in KRB

Description

Kenexa has changed the list administration functionality in KRB and made a small validation change in Workbench to keep it consistent with the KRB changes described below. With these changes, all methods for creating form field options within KRB and Workbench are consistent.

As a result of these changes, List administrators:

☐ Must create a both a distinct code and a description when creating a form field option in KRB.

☐ Must enter, in some cases, a sort order value for each option created. See page 40 for more information.

☐ Can use special characters in the Descriptions field such as the ampersand ("&") in place of "and".

☐ May not use special characters in the Code field. The restricted characters are ;"*!`~@#=+?\,>< ' %|[{ }].

☐ Can use the same description text for more than one field option, as long as the corresponding code is unique (for example, "011:Finance" and "022:Finance"). However, please see the **warning** below.

Warning: To support field association functionality, Kenexa dropped the restriction on using duplicate descriptions for field options within KRB. To maintain consistency between Workbench and KRB, Kenexa also removed the validation in Workbench that restricts users from creating field options with duplicate descriptions for field options.

This means that the system no longer stops KRB or Workbench users from creating field options with identical descriptions.

Best practice recommendation: Kenexa *strongly* recommends that organizations not using field association do *not* create field options with identical descriptions. These descriptions populate dropdown lists from which KRB users and Talent Gateway users make selections. If these list items contain the same description for several list items, end-users will see several instances of the same list item in dropdown lists and have no way of knowing which one to choose.

Table 7: Add new option screen

Field	Description
Code *	A maximum of 255 characters (50 for req fields) is accepted.
	The code must be distinct for that field.
	Do not use the following special characters in this field:

	;"*!`~@#=+?\,>< ' %|[{}]
Description *	A maximum of 255 characters is accepted. The value must be a positive integer.
Sort order ^	You can enter a maximum of five (5) integers. ^ This field is required (*) only if field options in Workbench are set to **Sort by designated order**.

New functionality or replacement

This is both new and replacement functionality.

Benefits

Workbench and Kenexa Recruiter BrassRing functionality are now consistent with one another.

Your organization can enter a distinct code and description value for each field option that will populate lists of various kinds. You can use special characters in the **Description** field. You can designate a sort order for the new options, if desired.

Details/Limitations/Known interactions

Please extreme caution if you decide to use duplicate descriptions.

The existing user interface for lists does not display both code and description so users and Talent Gateway candidates have no way of distinguishing duplicate options from each other.

Users can see distinct "code: description" values only if lists are displayed as scaled select (if more than 200 options exist), but Talent Gateways do no use scaled select lists.

Overview of Implementation

This feature is configured through the Admin+ menu in Kenexa Recruiter BrassRing.

Time Frame of Implementation

This feature is available in Release 10.

Best Practice Recommendations

Kenexa *strongly* recommends that organizations not using field association do *not* create field options with identical descriptions. These descriptions populate dropdown lists from which KRB users and Talent Gateway users make selections. If you create list items using the same description for several list items, end-users will see several instances of the same list item in dropdown lists and have no way of knowing which one to choose.

Cost

There is no additional cost for this feature.

Visible Changes

Any KRB user with List Administration access will automatically see this change.

Workbench users will no longer receive an error when entering a duplicate option description.

Configuration and Setup

Adding Options to List Fields

This section describes the changes to list administration when adding field options in KRB for standard req fields, custom req fields, and candidate form fields.

To add field options in Kenexa Recruiter BrassRing, follow these steps:

1. Log in to KRB.

2. Select **Admin+** > **Lists**. The **Admin+: Lists** page appears.

3. Locate the list you want to administer in the grid and click its **Administer this list** icon. The **Administer list** page appears for that particular list.

4.
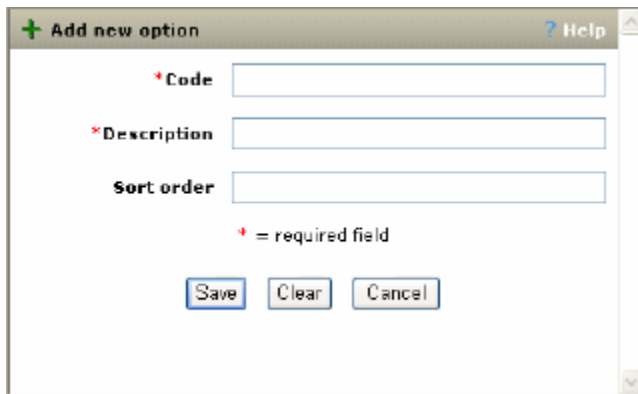
Click **Add new option** in the **Actions** menu. The **Add new option** window appears.

Figure 14: Administer list: Add new option Window

5. Use the information from the following table to complete the fields.

Table 8: Add new option fields

Field	Description
* Code	This field is required to create a new option. Enter a unique identifier for the field option. The character limits for codes for field option types are: Custom req field 255 Candidate form field 255 Standard req field 50 Do not use special characters in this field or the following message displays: "Code may not contain the following special characters: ;"*!`~@#=+?\,>< ' %|[{}]"
* Description	This field is required to create a new option. Enter the descriptive text for the field option. Users see this descriptive text in dropdown lists in KRB and Talent Gateways. You can use special characters in this field. The character limits for descriptions for field option types are:

	Custom req field 255 Candidate form field 255 Standard req field 255 Although the field accepts duplicate descriptions, users are advised against creating options with duplicate descriptions unless the field being administered is used within a field association. For more information, see page **Error! Bookmark not defined.**

Sort order
 	
(**Note:** This field is required in some cases.)
	Enter the sort order for this field option using the following syntax: 001, 002, 005, 010, and so forth.
	
	The field is required (indicated by *) only if the **Sort by designated sort order** option in Workbench is selected for these field options. If the **Sort Alphabetically** option is selected, then entering a sort order is not required.
	
	List administrators can assign the same sort order value to more than one field option. However, Kenexa recommends that sort order is distinct for each option.
	
	If the List administrator assigns the same sort order to more than one option, the following occurs:
	
	The options are first sorted by sort order (001, 002, 003, and so forth) and then alphabetically by code value for each option within each sort order.
	
	Sort order 1
	    Code Value A
	    Code Value B
	    Code Value C
	Sort order 2
	    Code Value A
	    Code Value B
	    Code Value C

Click **Save** to save your additions or changes.

Click **Clear** to empty out the fields and start over.
Click **Cancel** to close the window without saving any changes you might have made.

Editing options of list fields

To edit field options for lists in Kenexa Recruiter BrassRing, follow these steps:

1. Log in to KRB.

Select **Admin+ > Lists**. The **Admin+: Lists** page appears.

Locate the list you want to administer in the grid and click its **Administer this list** icon. The **Administer list** page appears for that particular list.

Locate the option to be edited in the grid and click its **Edit description** icon. The **Edit option** window appears.

Use the information from the table below to complete the fields.

Table 9: Edit option window

Field	Description
* Code	The existing Code value for the field option is populated. The value cannot be changed.
* Description	Edit the descriptive text for the field option if desired. Users see this descriptive text in dropdown lists in KRB and Talent Gateways. You can use special characters in this field. The character limits for descriptions for field option types are: Custom req field 255 Candidate form field 255 Standard req field 255 Although the field accepts duplicate descriptions, users are advised against creating options with duplicate descriptions unless the field being administered is used within a field association.
Sort order (**Note:** This field is required in some cases.)	Enter the sort order for this field option using the following syntax: 001, 002, 005, 010, and so forth. The field is required (indicated by *) only if the **Sort by designated sort order** option in Workbench is selected for these field options. If the **Sort Alphabetically** option is selected, then entering a sort order is not required. List administrators can assign the same sort order value to more than one field option. However, Kenexa recommends that sort order is distinct for each option. If the List administrator assigns the same sort order to more than one option, the following occurs:

The options are first sorted by sort order (001, 002, 003, and so forth) and then alphabetically by code value for each option within each sort order.

Sort order 1
   Code Value A
   Code Value B
   Code Value C
Sort order 2
   Code Value A
   Code Value B
   Code Value C

Click **Save** to save your additions or changes.

Click **Clear** to empty out the fields and start over.

Click **Cancel** to close the window without saving any changes you might have made.

Blocked HR Status Period and Custom Field Options

Kenexa added the ability to block candidates from being moved to certain HR statuses in Release 9.

If your organization uses this feature the configurable setting **Ignore blocked HR Status period** is available on the **Add new option** screen for custom req fields administered through List administration.

The block HR status setting applies only to custom req field of the single-select or radio button type.

Add a New Option for Single-Select and Radio Button Fields

When you add or edit a new option of a single-select or radio button type for a custom req field, the **Add new option**/ **Edit option** windows include one additional field: **Ignore blocked HR Status period**. This field's default setting is **No**.

To add a new custom req field option which uses a single-select list or radio button control type:

1. Follow the instructions on page 40 for adding a new field option.

2. Choose the desired setting (**Yes** or **No**) for **Ignore blocked HR Status period**. The default setting is **No**.

3. Click **Save**.

Edit Option for Single-Select and Radio Button Fields

To edit a custom req field option that uses a single-select list or radio button control type, follow these steps:

1. Log in to KRB.

2. Select **Admin+ > Lists**. The **Admin+: Lists** page appears.

3. Locate the list for the custom req field you want to administer in the grid and click its **Administer this list** icon. The **Administer list** page appears for that particular list.

4. Locate the option to be edited for the custom req field in the grid and click its **Edit description** icon. The **Edit option** window appears.

5. Follow the instructions on page 42 for editing field options. You can change only the **Description** and the **Sort order** fields.

Figure 15: Ignore blocked HR Status period

HR Status Restrictions and Ignore Blocked HR Status Period

The table below describes the interaction between the setting for **HR Status restrictions** and the setting for **Ignore Blocked HR Status period**.

Table 10: HR Status restrictions/Ignore Blocked HR Status period

Condition	Result
If the **HR Status restrictions** setting at the field level is **No** …	The **Ignore Blocked HR Status period** setting is displayed as a read-only (grayed out) field.
If the **HR Status restrictions** setting at the field level is **Yes** …	The **Ignore Blocked HR Status period** setting is active.
If the **Ignore blocked HR Status period** setting is **Yes** …	When the field option is selected on the Req, the blocked HR Status period is ignored.
If the **HR Status restrictions** setting is changed to **No** at the custom req field level and any options have **Ignore blocked HR Status period** setting is **Yes**...	The blocked HR Status period is ignored.

Changes to the Translate Field Options Page

On the **Translate field options** page for KRB List administration, two of the existing column headers have been renamed to match the column headers in the corresponding Workbench page. There are no functionality changes to this page.

To view this page in KRB, select **Admin > Admin+ > Lists > Administer this list > Translate options**.

Table 11: Translate field options page: field name changes

New field name	Old field name
Description	Database field name
Translation	Name

Populating the Job Description Field

Description

If your organization uses **Job Code Default Data,** there will now be a choice of retaining the contents of the Job description field on the req template instead of having it automatically replaced with the contents of the Job description field on the Edit code page when the appropriately privileged user type edits a job code.

The ability to update the req template job description automatically with the Job code job description—as in the past—will not be lost. Organizations who want to keep the Req template job description text when editing job codes will now have that as an option.

New Functionality or Replacement

This is new functionality.

Benefits

Organizations who want to keep the req template job description text when editing job codes now have this option.

Details/Limitations/Known Interactions

This feature is available only for organizations that use Job Code Default Data. Users can use it only on the **Edit code** page—it is not available through the **Add code** page.

The description entered in the **Job description** field on the **Edit code** page is saved to a separate table. Any subsequent changes made on the req template **Job description** field do not change the contents of the **Job description** field on the **Edit code** page (as per current functionality).

Overview of Implementation

This feature is enabled through the Admin+ menu on the **Edit codes** page in Kenexa Recruiter BrassRing by KRB users with Admin+ Codes user privilege.

Time Frame of Implementation

This feature is available in Release 10.

Cost

There is no additional cost for this feature.
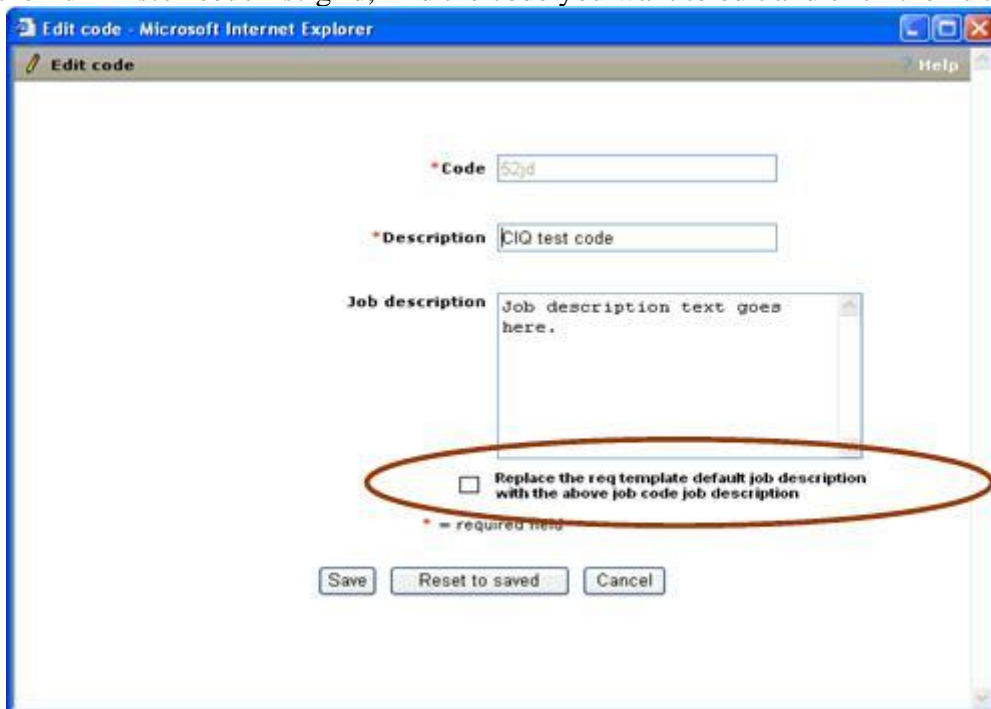
Visible Changes

Users with the Admin+ Codes user privilege can see this change.

User Experience

KRB users edit job codes through the **Admin+** menu in Kenexa Recruiter BrassRing.

To edit a code, follow these steps:

1. Log in to KRB.

2. Select Admin > Admin+ > Codes.

3. In the **Administer code list** grid, find the code you want to edit and click the **Edit** icon in

its row. On the Edit code page, the added check box is below the Job description field: Replace the Req template default job description with the above job code job description.

Figure 13: Edit code page with new setting for Job description field

The checkbox displays only if your organization uses **Job Code Default Data**, and only on the **Edit codes** page; it is not on the **Add codes** page. By default, it is not selected.

☐ Unchecked: The contents of **Job description** on the **Edit code** page *do not replace* the contents of the req template default job description field.

☐ Checked:The contents of the req template default job description field *are replaced with* the job description from the `Edit code` page.

Replace the req template default job description with the above job code job description

4. Click `Save` to save your changes.

The job description on the req template page never overrides the default job description on the `Edit job code`page.

How the Job description field is populated

Table 6: Populating the Job description field for different settings

	CODE (1)	DESCRIPTION (2)	JOB DESCRIPTION (3)	CHECKBOX (4)	JOB DESCRIPTION FIELD ON REQ TEMPLATE (5)
Example 1	SSE	Senior Software Engineer	Original text of the job description	ON (checked)	Populated with contents of column 3; old contents, including blank, are overwritten.
Example 2	SSE	Senior Software Engineer	Blank; user erases it or it was blank to start with	ON (checked)	Populated with contents of column 3; old contents, including blank, are overwritten.
Example 3	SSE	Senior Software Engineer	Blank; user erases it or it was blank to start with	OFF (not checked)	Not populated with contents of column 3; the previous value is retained, including blank.
Example 4	SSE	Senior Software Engineer	Text of job description	OFF (not checked)	Not populated with contents of column 3; the previous value is retained, including blank.

Additional scenarios

Assume the user edits a job code and leaves the check box unchecked. Then on the Req template selection page, the user selects additional req templates for setting up default data.

1. The job description displays blank for the additional req templates selected in the previous screen. This applies to all languages.

2. For existing req templates, the job description displays the values it was previously saved with, or it displays as blank if previously saved as blank. This applies to all languages.

   3. If the user edits a job code, selects the checkbox, and edits the default data:

4. The job description on the **Add req** page is overwritten in all languages irrespective of whether data/ translation previously existed in that language or not.

5. If no job description was provided, the field is blank.

Agency Manager Attachments

Description

Agency Manager has a configurable attachments capability similar to Talent Gateways. Agency Manager users can upload attachments, specifying their category based on a predefined list of attachment categories created by your organization. Once the attachments are submitted, they must be managed from within Kenexa Recruiter BrassRing.

New Functionality or Replacement

This is new functionality

Benefits

This feature extends the functionality available in Kenexa Recruiter BrassRing and Talent Gateways to Agency Manager.

Details/Limitations/Known Interactions

Agency Manager users cannot alter attachments that have been uploaded to Agency Manager.

Agency Manager permits a single attachment size of 10 MB.

Agency Manager attachments count toward the client's overall attachment storage.

Overview of Implementation

This feature is configured by Kenexa.

Time Frame of Implementation

This feature is available in Release 10.

Cost

There is an annual cost associated with this feature. Contact your Kenexa representative for more details.

Visible Changes

There are no Visible Changes without configuration.

User Experience

Agency Manager

This section describes the business rules and procedure for uploading attachments through Agency Manager.

Uploading Attachments

Agency Manger users can upload and submit attachments through Agency Manager. The **Submit attachments** page displays after the Contacts page only if the Agency Manager is configured in Workbench to allow at least one attachment.

The Agency Manager user can browse his or her local directories for a file, upload the file, and assign an attachment category to it.

If you want to bypass this step and not submit any attachments, click **Continue** in the Submit attachments area of the bonded.

To upload an attachment in Agency Manger and submit it, follow these steps:

1. In the **Select files** area of the window, click **Browse** to look for and select one or more files to attach.

    Navigate to and select the file you want to upload in the dialog box. The local path name for that file populates the **File 1** text box.

    Click **Upload**. The file is added to the **Uploaded files** grid.

    Click **Continue** to go to the next page.

Figure 31: "Submit attachments" page

The table below describes the **Submit attachments** page in detail.

Table 19: Submit attachments page

Section/Field	Description
Submit attachments	This section includes the attachments instructions directed to Agency Managers. It lists requisition numbers and can include specific instructions for requisitions. See page **Error! Bookmark not defined** for information about attachment instruction configuration in Workbench.
Continue / Cancel	Agency Manager users can: Click **Continue** to go to the next page without uploading files Click **Cancel** to close the window without making any changes
Select files	Agency Manager users can browse for and select one or more files to upload in succession. The number of files that may be uploaded and the maximum size of each file can be configured by your organization. Agency Manager users click **Browse** to open a dialog box to search for files to upload on their respective hard drives or in their network neighborhoods.

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	The **File [No.]** text box displays the file name and the path to the source location for the file.
Upload button	Agency Manager users click **Upload** to upload the currently selected file(s). The system displays a progress bar as the file is uploaded.
Attach more files	Agency Manager users can click **Attach more files** to display a new file upload section. This starts the browse, select and upload sequence again. Users can attach more files up to the limit for the number of attachments configured for the site. The default maximum is 15 attachments.
Uploaded files	The uploaded files and their parameters are listed in a grid. The **File [No.]** field displays the name of each file selected for attachment and its source location. The file name is a hyperlink so that Agency Manager users can view it. The file information is automatically updated as files are uploaded or selected from the previously uploaded files during the session.
Category	Required. The default setting is **None.** Agency Manager users select the attachment category for each attachment.
Size	The approximate size of the uploaded file in Kilobytes (KB).
Remove button	Clicking this button removes the file from the list of uploaded files. Click **OK** to confirm the removal or click **Cancel** to leave the file attached for submission.

Error Messages

The following table lists the messages displayed when certain error conditions are met:

Table 20: Error conditions and attendant messages

Condition	Error message

Attachment larger than maximum size limit	The maximum size for each attachment is [x] MB. The following attachment(s) exceeded the size limit: [file list]
Candidate uploads more than the maximum number of allowed attachments.	The maximum number of attachments for each submission is [x]. If you need to attach additional files, please remove one or more attachments from the Uploaded Files section.
File type of attachment not supported	The attachment must have a file extension of .bmp, .csv, .doc, .gif, .htm, .html, .jpg, .ppt, .pdf, .rtf, .tif, .txt, .xls, or .xml. The following attachment(s) have invalid extension types: [file list]
Category not selected upon clicking Continue	This is a required field. Select a category.
Browse and select a file from local directory and without clicking "Upload" button, click "Continue."	You have entered file(s) that have not been uploaded. Do you wish to continue without uploading the file?" The options will be "OK," and "Cancel."
Any other reason in which the file could not be saved on the server	One or more attachments could not be saved. Please retry uploading the attachment(s): [file list]

Kenexa Recruiter BrassRing

All attachments uploaded via Agency Manager are included in the Attachment Audit report.

Recipients must have the user privilege to view the attachment: If an attachment uploaded through Agency Manager is included in an eLink, KRB checks the user privilege, Attachments - view "All attachments uploaded via Agency Manager." If the recipient does not have this privilege, the attachment name displays without the hyperlink to the

Agency Manager Data Privacy

Description

Agency Recruiters using Agency Manager frequently submit candidate CV/Resumes on behalf of candidates. This scenario puts global organizations at risk because the candidate submission is submitted to the Kenexa Recruiter BrassRing database before the candidate is able to sign off on the privacy statement, which is a legal requirement in many countries. The system does not track whether a candidate has consented to the privacy statement before accepting the submission.

In Release 10, your organization can configure each Agency Manager site(s) at to block submission if a candidate's consent has not been obtained.

The Agency user can use the new Agency Manager attachment functionality, described previously, to upload the "signed-off" data privacy consent form (either electronic signature or scanned document) as an attachment to the candidate record when submitting it.

The agent can also complete form questions, allowing him or her to:

Indicate that s/he has obtained the candidate's consent

Upload the consent as an attachment

There are no Visible Changes associated with this project without configuration.

New Functionality or Replacement

This is new functionality.

Benefits

This feature supports data privacy compliance by allowing form questions to be completed by the Agent. Agents can also obtain the candidate's consent, upload the consent form as an attachment, and respond on the candidate's behalf.

In addition, your organization can block form submission if consent has not been obtained, preventing information from entering KRB without the proper consent.

Details/Limitations/Known Interactions

Overview of Implementation

This feature is configured by Kenexa.

Best Practice Recommendations

User Experience

Agency Manager

If an Agency user selects a minimum of one field option for which blocking is configured, the Agency user sees the "blocked submission" text message as shown in the following example when he or she clicks **Submit**.

Figure 32: Example of blocked submission message displayed to Agency user

Kenexa Recruiter BrassRing

In KRB, the responses to the form field questions answered through the Agency Manager are attached to the Candidate's Talent Record as a form.

If questions from the same form are used for the Agency user and Candidate, two forms (including Talent Gateway forms) are added to the Candidate's Talent Record.

Understanding who Submitted the Form

If the **Added by** column of the **Agency Form** tab says "Agency submission," this means that the Agency user completed the form.

If the **Added by** column of the **Agency Form** tab says "System submission," this means that the Candidate completed the form.

PreVisor upgrade

PreVisor is upgrading their assessment platform, Select2Perform, to include more robust reporting capabilities. This upgrade will be available through all of their ATS integrations.

There are no Visible Changes on the Kenexa Recruiter BrassRing side.

Clients using PreVisor receive the upgrade automatically. There is no additional charge for the upgrade.

Visible Changes

There are no Visible Changes on the Kenexa Recruiter BrassRing side.

Clients using PreVisor receive the upgrade automatically. There is no additional charge for the upgrade.

Integrated Kenexa Assessments

Description

The Kenexa assessment platform is an integrated set of candidate skills assessment and behavioral profiling tools that your organization can access from within Kenexa Recruiter BrassRing without a separate login.

The new Kenexa assessment platform includes Kenexa Prove It! and Kenexa Selector.
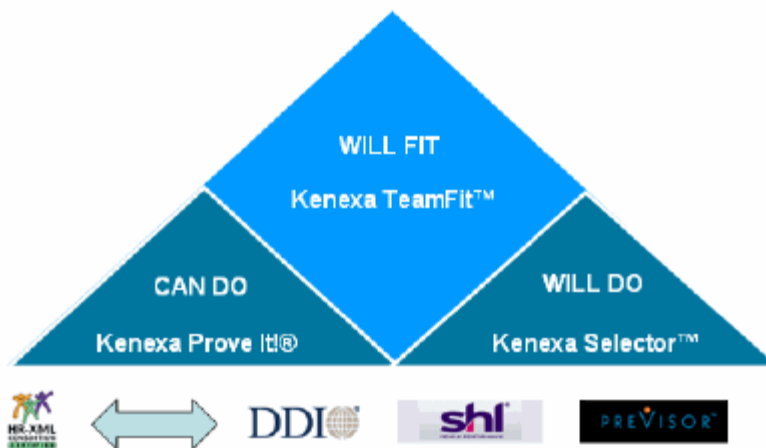
Kenexa Prove It!® offers more than 900 validated skills-based assessments for clerical, software, call center, financial, healthcare, industrial, legal and technical job classifications, helping clients to identify top candidates and streamlining the screening process.

Kenexa Selector™ is a behavioral profiling tool that assesses personality, experience, situational judgment and problem-solving ability to predict candidate performance for hourly, sales and managerial positions.

Kenexa Recruiter BrassRing provides a choice of two assessment vendors with Release 10: Kenexa Prove It!™ or PreVisor. (Note: PreVisor has been upgraded. See page 102 for more information.)

New Functionality or Replacement

This is new functionality.

Benefits

Kenexa Prove It! (KPI) and Kenexa Selector offer more than 200 validated skills and behavioral based assessments to help clients screen candidates more effectively:

☐   The integration is seamless: No logins are required.

☐   Users can access detailed reports through the KPI platform.

Candidate assessments are built into the applicant tracking workflow:

- ☐ from a full Talent Gateway, based on prescreening results

- ☐ proctored from within KRB

Details/Limitations/Known Interactions

Kenexa Recruiter BrassRing and Talent Gateway error messages are localized. Kenexa assessment titles and integration platform error messages are not localized.

Switching or Inactivating Assessment Vendors

Switching from PreVisor to Prove It!: If your organization switches from PreVisor to Kenexa Prove It!,or vice versa, KRB users will have only the current vendor's titles available when editing old reqs. PreVisor users who switch to Kenexa Prove It! are able to see PreVisor scores and "considered for" data for any previously completed PreVisor tests. All hyperlinks are active for PreVisor data.

Switching when a req is associated with an assessment: If users have a req with an associated assessment and change assessment vendors, the req does not display the previously selected assessment in edit mode; it displays only the assessments of the new vendor for selection.

Inactivated assessments: If an assessment is inactivated, regardless of which vendor the assessment belongs to, any reqs associated with that assessment display the assessment title(s) in view mode.

Elink invitation, inactivated vendor:

If a candidate clicks the eLink invitation for an assessment for a vendor that has been inactivated after the eLink was originated, or if assessments have been turned off altogether, the candidate sees an error message that says the assessment is no longer available.

Best Practice Recommendations

Kenexa recommends the following when implementing assessments: Give each assessment a name that reflects its category. For example, the title "Financial Math (Financial)." "Financial Math" is the Kenexa Prove It! title, and (Financial) reflects the Kenexa Prove It! category.

When using assessments with requisitions:

- ☐ Do not include candidates taking different assessments in one req folder.

- ☐ While there is nothing to stop users from editing assessments on a posted req, Kenexa strongly recommends against changing assessments on an open requisition. If you must change an assessment associated with a posted req, close the req and reopen it with the new assessment.

☐   Although it is possible to go back and change the assessment, Kenexa recommends that you do not.

Overview of Implementation

This feature must be activated and configured by Kenexa. Please contact your representative for more details.

Time Frame of Implementation

This feature is available now.

Cost

There is a fee associated setup and use of Kenexa Assessments; however, there is no fee for the integration with KRB. Please contact your Kenexa representative for more information.

Visible Changes

There are no Visible Changes associated with this feature.

Configuration and Setup

Adding an Assessment Vendor

The major steps for adding an Assessment vendor are:

1. Kenexa activates assessment integration.

2. A workbench certified user, or Kenexa, must customize text for the Assessment invitation and invitation e-mail message.

3. In Kenexa Recruiter BrassRing, users can work with assessments from a candidate's Talent Record or Req folder, under specified conditions.

    ☐   After logging into KRB, navigate to the candidate's Talent Record through the Req folder.

    ☐   Select the **Integration** tab.

    ☐   Click **Run Assessments.**

    ☐   Choose to launch and run the assessment on the spot, or e-mail an eLink invitation to do the assessment at a later time.

Using Assessments in KRB

This section describes the new Kenexa Prove It! assessment feature and other changes to assessments functionality within Kenexa Recruiter BrassRing (KRB). Kenexa Prove It! uses the existing assessment integration technology (ePredix/PreVisor). There are minimal changes to the user interface in KRB.

The Kenexa Prove It! integration affects the following functions in Kenexa Recruiter BrassRing:

☐ **Add a req, Edit a req, View a req**

☐ The **View req assessment results** button in req folder view

☐ **Run assessments** (launching and eLink)

☐ The Assessments grid on the **Integration** tab of the Talent Record. The contents of the **Considered for** column on the assessments grid in KRB contain the Req number/name for clients configured to use in Kenexa Prove It!

The **Considered for** column containing the req number/name with which the assessment test is associated:

☐ *Is not* a clickable link for Kenexa Prove It!
☐ *Is* a clickable link for PreVisor

Figure 4

: "Considered for" field in PreVisor

Note: PreVisor clients who change to Kenexa Prove It! can still access the live **Considered for** links for any PreVisor-administered assessments.

PreVisor users can click the hyperlinked score in the Assessments area of the **Integration** tab of the Talent Record to access a detailed report.

Assessments Displayed on the Req Form

For Prove It! clients, KRB users can select one or multiple assessments at a time (up to a maximum of 20 tests per req) to display on the req. For PreVisor clients, KRB users can select one (1) assessment only per req.

Launching Assessments from a Talent Record

To launch an assessment from a candidate's Talent Record, the candidate in question must be filed to a requisition folder, and one or more assessments must be associated with that requisition folder.

Note: KRB users can select a single Talent Record only from within the Req folder for administering assessments. KRB users cannot launch an assessment off of an HR status.

There are four steps for running PreVisor assessments and three steps for Kenexa Prove It! Kenexa Prove It! bypasses the first step.

Running Assessments

Recruiters can run one or multiple assessment tests on the spot from within Kenexa Recruiter BrassRing if desired. The procedures differ slightly for the two assessment platforms, Kenexa Prove It! and PreVisor.

Proctored and Unproctored Assessment Types

PreVisor includes two assessment types, "proctored" and "unproctored." Within PreVisor, a proctored assessment differs from an unproctored assessment.

Kenexa Prove It! does not have a "proctored" assessment type; all Kenexa Prove It! assessments are treated as "unproctored."

Supervised Assessment Sessions

Recruiters may want to run supervised assessments as part of the process of interviewing the candidate in person. Recruiters can run assessments in supervised sessions for both assessment platforms.

Note: For PreVisor only, if the recruiter wants to run a supervised assessment session, he or she must select the **Proctored** assessment category for Step 1 after clicking **Run assessment**. See page 21, Step 4 of the overall procedure for running PreVisor assessments.

For example, assume a candidate is applying for a job. Also assume the req for the job has an assessment associated with it, and the candidate meets the threshold requirements for the job. When these conditions are met, the last page in the apply process contains an assessment invitation message and the URL for the assessment.

The candidate has the option of clicking on the assessment URL immediately, or he or she can copy the link and access it at a later time.

For the convenience of the candidate in that situation, the KRB client site can also enable the automatic triggering of an e-mail containing the invitation to do the assessment and the assessment URL, in addition to displaying it at the end of the apply process.

The procedure for each assessment type is described separately in the next few sections.

Running Kenexa Prove It! Assessments

The steps in this section are for both Kenexa Prove It! and PreVisor.

To run assessments, follow these steps:

1. Log into KRB.

2. Navigate to the candidate's Talent Record (through the Req folder or through Candidate Search, for example). **Note:** The candidate must be a req folder with an associated assessment.

3. Select the **Integration** tab.

4. Click Run Assessments.

> **Note:** Because Kenexa Prove It! does not have an assessment category of "unproctored," the Prove It! assessments process skips "Step 1" and starts at "Step 2."

> The **Step 2: Select/confirm assessment name** window appears. It lists the assessments originally selected by the creator of the requisition.

> Kenexa Prove It! can include up to 20 assessment titles.

> **Note:** If the KRB user selects **Run assessment** from within a Req folder that contains historical data from another vendor, and no updates have been made to that requisition, then Step #2 displays the same message for Kenexa Prove It! and PreVisor. The KRB user must edit the choices at the requisition level to proceed.

5. Click **Continue** to go on to Step 3. The **Step 3: Select administration method** window appears.

6. Select the administration method for the assessment test:

> **Launch and run assessment now**
>
> **Elink the assessment to the candidate**

7. Click **Continue** to go on to Step 4. The **Step 4: Run assessment** window appears. Depending on your selection in the previous step, you will:

> Supervise the candidate while s/he completes an assessment on the spot
>
> Complete the e-mail form to eLink the assessment to the candidate

Running PreVisor Assessments

To run assessments, follow these steps:

8. Log into KRB.

9.   Navigate to the candidate's Talent Record by using a Req folder filter or by searching for the candidate. The candidate must be in a req folder with an associated assessment.

10.   Select the Integration tab.

11.   Click Run Assessments. The process is different for Kenexa Prove It! and PreVisor client sites. The Step 1: Select the assessment category window appears.

12.   Select one of the following:

Un-Proctored

Proctored

13.   Click Continue. The Step 2: Select/confirm assessment name window appears. It lists the assessments originally selected by the creator of the requisition.

You can verify but not change the assessment selected at the requisition level.

Best practice recommendation: Although it is possible to go back and change the assessment, Kenexa recommends that you do not.

Req folders with historical data from another vendor: If a user selects Run assessment from within a Req folder that contains historical data from another vendor, and no updates have been made to that requisition, then Step #2 displays the same message for Kenexa Prove It! and PreVisor. The KRB user must edit the choices at the requisition level to proceed.

Note: Users cannot delete assessments containing transactional data.

14.   Click Continue to go on to Step 3. The Step 3: Select administration method window appears.

15.   Select the administration method for the assessment test:

Launch and run assessment now

Elink the assessment to the candidate

16.   Click Continue to go on to Step 4. The Step 4: Run assessment window appears. Depending on your selection in the previous step, you will:

Supervise the candidate while he or she completes an assessment on the spot

Complete the e-mail form to eLink the assessment to the candidate

Elinked Assessments

Candidates to whom assessments are eLinked receive the e-mail containing a URL with instructions to follow the link to take the assessment.

The hyperlink in the candidate's e-mail says "Please click here to complete your assessment." The URL text is not customizable. The text that appears above URL text in the e-mail is customizable.

When the candidate clicks the eLink, Kenexa Prove It! launches with instructions for taking the test. The e-mail invitation message can be translated based on candidate's browser language.

Elinks are authenticated.

There is no expiration on the availability of the links once they are sent.

Retaking an Assessment

Your organization can elect to set up parameters (with help from the Kenexa Assessments team) that determine how long test results are valid. When these parameters are set up, an applicant who has completed assessments within the designated time frame will not have to retake the assessments for a different job requisition.

When the Talent Gateway displays, the assessment invitation to the candidate who has just completed the apply process, KRB sends the order to Kenexa Prove It!, and Prove It! validates the candidate. Kenexa Prove It! informs the applicant that he or she does not need to re-take this test. The test results are sent back to with the appropriate information for display on the Talent Record and requisition folder.

Note: Assessment results are not shared across requisition folders in KRB.

Viewing Assessment Test Results

To view assessment test results, select the **Integration** tab on the Talent Record.

Figure 5: Assessment test results grid (Prove It!)

See the table below for more information about the Assessments fields.

Table 4: Assessment test fields

Field	Kenexa Prove It!	PreVisor
Date sent/completed	Date the eLink was sent to the candidate or the assessment was completed by the candidate.	
Run by	Kenexa BrassRing Recruiter: When KRB users request assessments or eLinks assessments from within KRB, this column lists the System User name of the requestor. Talent Gateways: The column displays the group name for a Global Talent Gateway and the site name for a Full Talent Gateway when assessments are requested from a TG, including eLinking from a TG.	
Assessment type	N/A	Proctored or Unproctored
Name	Name of the assessment test.	
Considered for	Displays the plain text requisition title. Prove It! does not have group reports.	Displays a hyperlinked requisition title. Click the link to view PreVisor-generated group reports.
	PreVisor users who switch to Kenexa Prove It!, should still see PreVisor scores and "considered for" data for any previously completed PreVisor tests. As long as there is corresponding URLs in workbench for these tests, all hyperlinks should remain active for PreVisor data.	
Status		
Blank	The Status field for invited candidates is blank until they have completed the assessment test(s) and the score(s) are sent back to the Talent Gateway.	
In Progress	The Status field for candidates who have received an e-mail invitation to take assessments tests is In Progress until the scores are sent back.	
Completed	KRB updates the Status to "Completed" when the scores are sent back.	
Multiple e-mails are sent out	In instances where a KRB user sends out multiple e-mails with the same URL (that is, the user enters in multiple e-mail addresses when eLinking test), each request is a separate row in KRB. Only one row causes Status and Results to be updated.	
	Note: This is how PreVisor worked before this enhancement.	
Elinked assessment invitations and deactivated assessments	Kenexa Prove It!: If an assessment request has gone out, but the assessment is no longer active on the Prove it! site, the row in KRB is not updated to reflect this expiration. The **Status** remains set to **In Progress**. Prove It! does not have the ability to automatically send us notification back on expired assessments.	
Result	The KRB user can click the hyperlinked score to launch Prove It! and view detailed results of the assessment.	The score is displayed in plain text. For PreVisor, the score is Pass/Fail. For KPI, the score is a number.

Recommendation	N/A	PreVisor only. This field displays Pass or Fail, depending on the Result field.

After the candidate finishes the assessment, the assessment score is displayed as a hyperlink in the **Result** column on the **Integrations** tab of the Talent Record.

Status	Result	Recommendation
Completed	3	N/A
Completed	15	N/A
Completed	8	N/A

Figure 6: Result hyperlink (Prove It!)

Clicking the hyperlinked score launches Prove It!, where the KRB user can view the detailed results of the individual assessment.

Note: The **Recommendation** field is not applicable for Kenexa Prove It! results.
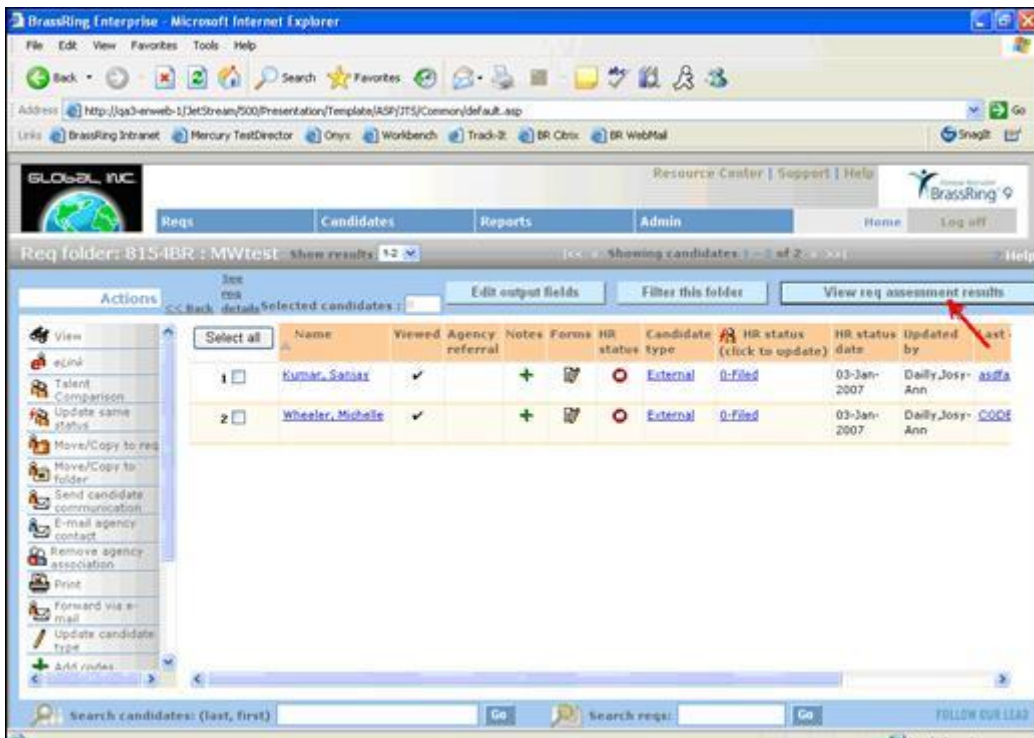
Figure 7: Example of detailed results for Prove It!

Generating PreVisor Reports

PreVisor users can generate reports from the req folder. This feature is not available for Kenexa Prove It! users.

If a user has a single req folder with both PreVisor and Kenexa assessment results, the **View req assessments results** button is available on the Req folder page but for PreVisor assessments only. (There is no change to report generation for PreVisor assessments.)

Figure 8: View req assessment results button (PreVisor)

Using Assessments on Talent Gateways

This section describes the candidate's experience of the assessment invitation at the end of the apply process in Talent Gateways.

Assessment Invitation Screen

The candidate logs into a full Talent Gateway to complete the application. At the end of the application process, the Talent Gateway invites the candidate to take the assessment and displays a hyperlink to the assessment URL. The applicant can elect to complete the assessment immediately or he or she can copy the URL and save it for later.

Note: A setting for **Assessment invitation email message** can automatically trigger an e-mail containing the eLinked assessment URL to the candidate. For more information, see page **Error! Bookmark not defined.**Certified Workbench users can also customize the assessment invitation text and the assessment invitation email message. See page 26 for more information.

Upon receiving the assessment e-mail invitation, the candidate clicks the hyperlink to display the **Assessment order** window. After the candidate completes the assessment, either the Kenexa Prove It! or PreVisor window launches.

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If the system cannot match the candidate's user ID to a resume, a message pops up saying that assessments are currently unavailable. When the candidate clicks **OK** to close the pop-up window, he or she is returned to the Talent Gateway or e-mail pages.

If the candidate's user ID is matched to a resume, the assessments window for the selected vendor launches.

Triggering an Assessment from the Talent Gateway

Note: This is existing functionality.

To trigger an assessment from a Talent Gateway, follow these steps:

1.   Log in to Kenexa BrassRing Recruiter.

2.   Select Requisition > Posting Options > Edit Posting Options > Edit Site Questions. The Talent Gateway site questions window appears.

3.   Enter a value in the field Minimum score to administer assessment field.

    If the applicant's score reaches this threshold, the assessment is triggered from the Talent Gateway job posting at the end of the apply process. If you do not enter a minimum score [meaning that the field is blank or set to zero (0)], no invitation to take a test is launched and no tests are administered.

Jobless Submissions and Assessments: There is no way to administer assessments from jobless submissions on a Talent Gateway.
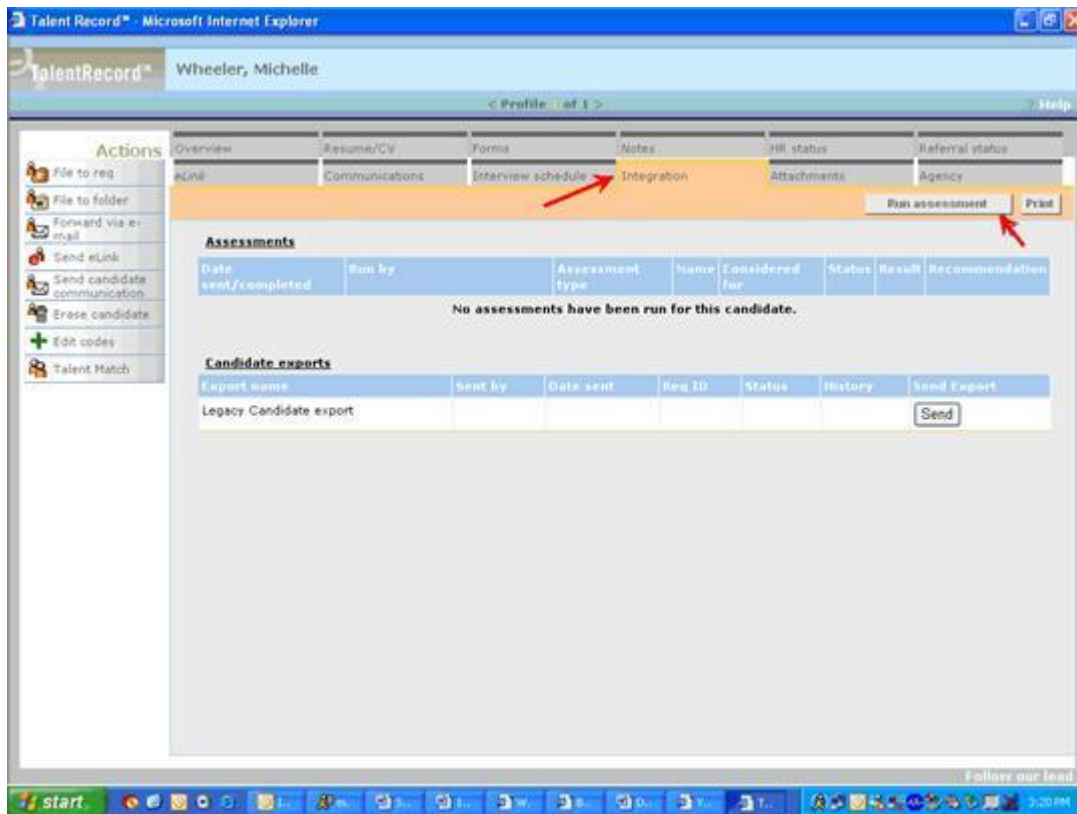
Figure 9: Talent Record in Kenexa Recruiter BrassRing

Hide the "My candidate" Menu

Description

For Release 10, Kenexa added a new user type privilege to hide the **My candidates** menu by user type. The "My Candidate menu – hide" privilege, when turned on, hides the **My candidates** menu in KRB for all users.

Figure 11: My candidates menu

New Functionality or Replacement

This is new functionality.

Benefits

Hiding the **My candidates** menu feature allows for more restricted access to candidates when it is combined with the already existing functionality of hiding candidates by HR status within req folders.

Details/Limitations/Known Interactions

The 'Hide "My Candidate" menu' privilege and the My Active privilege can not be turned on at the same time.

Overview of Implementation

This feature can be configured by a certified Workbench user or through Kenexa.

Time Frame of Implementation

This feature is available in Release 10.

Cost

There is no additional cost for this feature.

Visible Changes

There are no Visible Changes unless this feature is enabled in Workbench.

User Experience

In Kenexa Recruiter BrassRing, when the **My Candidate menu - hide** privilege is turned on, users can no longer see **My candidates** in the **Candidates** menu.

Figure 12: "My candidates" menu is hidden

Autofill Education and Experience on Candidate Forms

Description

KRB has significantly expanded the ability to auto-populate many fields on candidate forms from information stored in the candidate's Talent Record. This benefits KRB users by saving time and reducing errors due to keying redundant data into forms manually.

In past releases, organizations could configure only the education and work experience marked as "most recent" to auto-populate candidate forms.

Your organization can explicitly configure a total of 35 new fields (a maximum of five (5) sets of "Experience" fields and three (3) sets of "Education" fields) to auto-populate candidate forms completed within KRB, plus the most recent start year and most recent end year for employment.

For each candidate form, you can explicitly configure fields associated with work experience records, education records, and the applicant's profile to be automatically populated from the Talent Record.

Each autofill field must be configured separately for each candidate form that you wish to have populated automatically from data in the Talent Record.

Your organization should review each candidate form to determine if autofill fields apply to it and how many experience and education records should be included. Not all candidate forms will require all five (5) work experience records and all three (3) education records. For example, you may decide to add auto-fill fields for only three (3) work experience records and two (2) education records for a particular candidate form.

Figure 26: Example Talent Record with new autofill fields
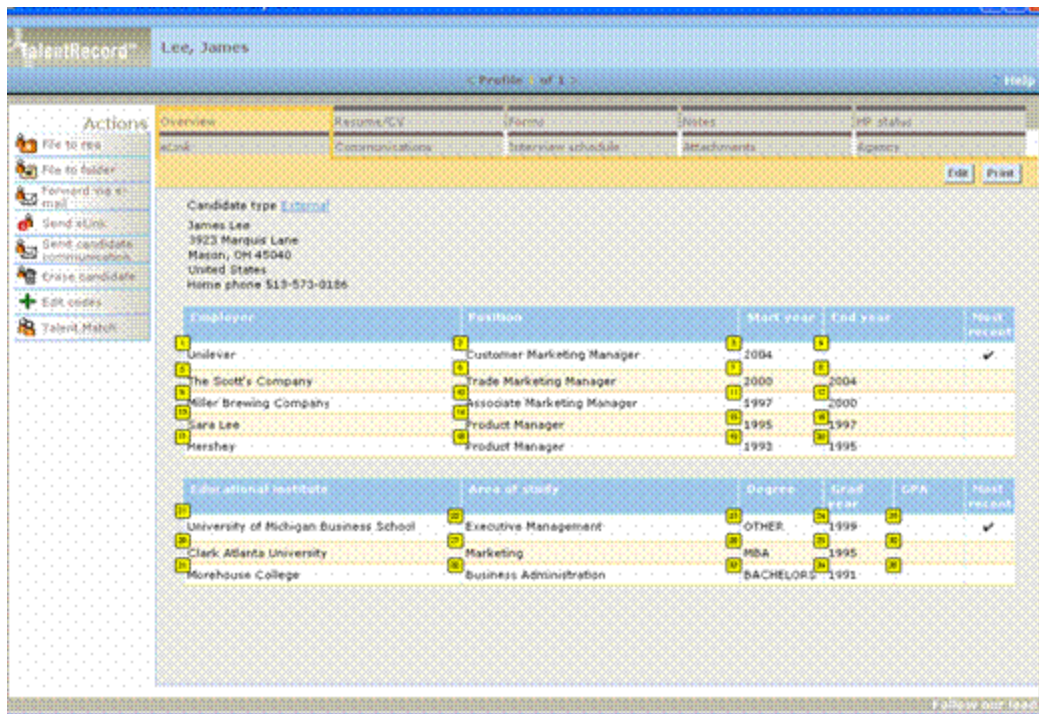
List of New Configurable Autofill Fields

The following table lists the new autofill fields that will be added that will correspond with the current fields available in the Talent Record.

Table 13: New configurable autofill fields

#	Label
1	EXPERIENCE.Employer 1
2	EXPERIENCE.Position held 1
3	EXPERIENCE.Start year 1
4	EXPERIENCE.End year 1
5	EXPERIENCE.Employer 2
6	EXPERIENCE.Position held 2
7	EXPERIENCE.Start year 2
8	EXPERIENCE.End year 2
9	EXPERIENCE.Employer 3
10	EXPERIENCE.Position held 3
11	EXPERIENCE.Start year 3
12	EXPERIENCE.End year 3
13	EXPERIENCE.Employer 4
14	EXPERIENCE.Position held 4
15	EXPERIENCE.Start year 4
16	EXPERIENCE.End year 4
17	EXPERIENCE.Employer 5

18	EXPERIENCE.Position held 5
19	EXPERIENCE.Start year 5
20	EXPERIENCE.End year 5
21	EDUCATION.Educational Institute 1
22	EDUCATION.Field of study 1
23	EDUCATION.Degree 1
24	EDUCATION.Grad year 1
25	EDUCATION.GPA 1
26	EDUCATION.Educational Institute 2
27	EDUCATION.Field of study 2
28	EDUCATION.Degree 2
29	EDUCATION.Grad year 2
30	EDUCATION.GPA 2
31	EDUCATION.Educational Institute 3
32	EDUCATION.Field of study 3
33	EDUCATION.Degree 3
34	EDUCATION.Grad year 3
35	EDUCATION.GPA 3
36	EXPERIENCE.Start Year (for most recent)
37	EXPERIENCE.End Year (for most recent)

New Functionality or Replacement

This is new functionality.

Benefits

This feature enhances current autofill functionality to include all education and experience records, not just the "most recent."

Clients can avoid the administrative burden and potential errors involved in re-keying the information from the Talent Record into candidate forms, increasing recruiter productivity and accuracy.

Details/Limitations/Known Interactions

The autofill feature applies only to candidate forms completed within KRB. It does not apply to candidate forms, or attachments to forms, completed through Talent Gateways.

Time Frame of Implementation

This feature is available in Release 10.

Overview of Implementation

This feature can be configured by a certified Workbench user or by Kenexa.

Cost

There is no additional cost for this feature.

Visible Changes

There are no Visible Changes without configuration.

User Experience

Up to five instances of Work experience, three instances of Educational experience, and two applicant profile fields will populate forms automatically when this feature is enabled.

Candidate Search page with Configuration Options

Description

Currently when performing a candidate search, users can select the **Years exp** search field and use it to specify search criteria for both the minimum number and maximum number of years worked. Using the latter criterion (maximum number of years worked) for candidate searches can be perceived as an indicator of age discrimination. For example, a search including a minimum of 3 years and a maximum of 10 years worked excludes any candidate that has worked more than 10 years in total, regardless of the relevancy of the work experience.

In this release, your organization can elect to use the current candidate search criteria for minimum and maximum number of years worked as described above, or you can enable a new setting to allow users to search on either minimum years experience or maximum years experience only. [**Note:** To remove the possibility of perceived or real age discrimination, organizations should exclude the ability to search on "**Max**" **Years exp.**]

New Functionality or Replacement

This is new functionality.

Benefits

Organizations can avoid any perception of age discrimination by removing the candidate search option of **Max years experience**.

Details/Limitations/Known Interactions

None.

Overview of Implementation

This feature is enabled by Kenexa. If your organization decides to enable this option to **Display min search field only** or **Display max search field only**, additional maintenance must be preformed in order to update existing overnight/saved searches that include the "Min" or "Max years experience" criteria. Please contact your Kenexa representative for more information and information on turn around times for such services.

Time Frame of Implementation

This feature is available in Release 10.

Cost

There is no additional cost for this feature.

Best Practice Recommendations

Kenexa recommends that in order to avoid any perception of age discrimination, your organization should remove the candidate search option of **Max years experience**

Visible Changes

There are no visible hanges without configuration.

User Experience: KRB

The **Years exp** setting affects the **Candidate Search** page and the **Filter folder** page in KRB.

Years exp: Min and Max

If the default setting **Display both min and max search fields** is kept, KRB users see the following on their candidate **Search** page:

Figure 22: KRB Candidate Search: Years exp – Min and Max

Years exp: Min

If the setting **Display min search field only** is selected, KRB users see the following on their candidate **Search** page:

Figure 23: Years exp: Min in KRB

Years exp: Max

If the setting **Display max search field only** is selected, KRB users see the following on their candidate **Search** page:
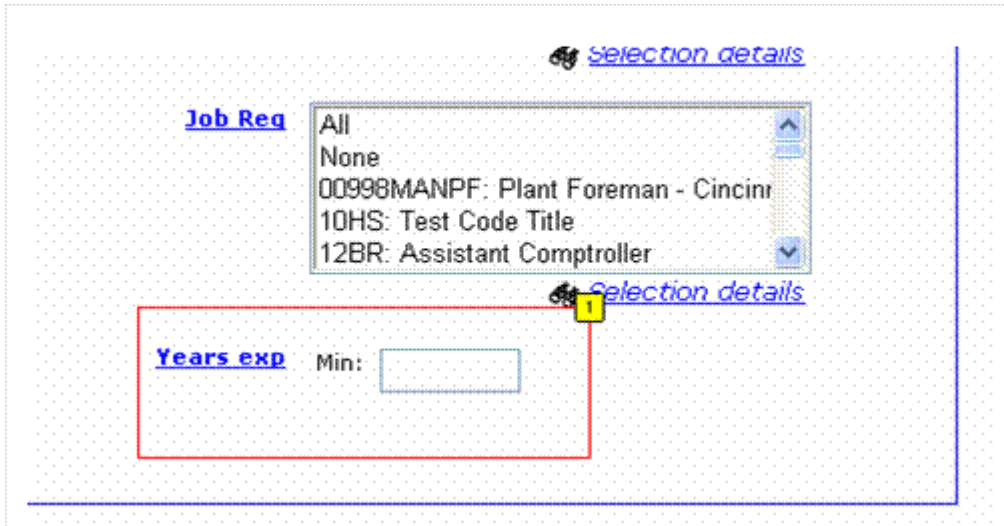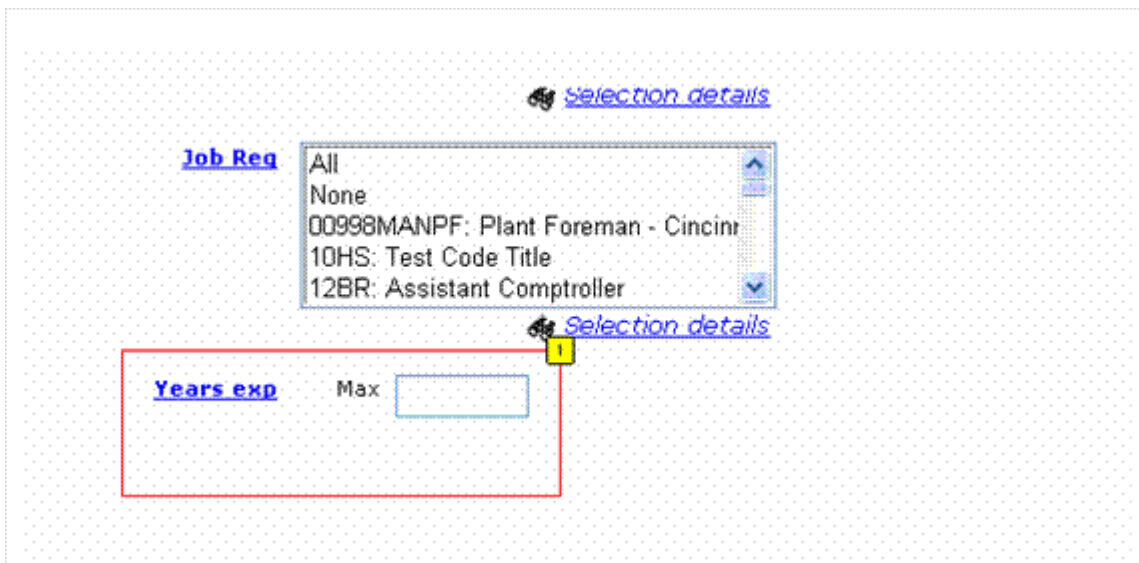

Figure 24: Years exp: Max in KRB

Candidate E-mail Encoding

Description

This additional setting affects the encoding of e-mails sent from within the Communications Module of Kenexa Recruiter BrassRing.

The existing setting, "Encoding of Emails," has been split into two different settings so that clients can specify one encoding method for system user e-mail and a different encoding method for candidate e-mail.

Your organization can set the encoding of e-mails for each type of user (system user or candidate) to either UTF-8 (the default setting) or locale-based.

These settings do not affect reporting and integration e-mails and eLinks.

Encoding of System user Emails controls e-mail encoding for the following types of users:

- System user

- Non-system user: A non-system user applies to anywhere in the system that the e-mail address field is not automatically populated with the candidate's e-mail address. Non-system users fall under the system user e-mail encoding setting.

- E-mail list recipients

It applies to the following scenarios for creating and sending e-mail:

- Forward via email

- Approval routing

- eLink

- System generated notifications from KRB

Encoding of Candidate Emails is a new setting. It applies to the following types of e-mail communications within the KRB Communications Module:

- Candidate e-mails that are automatically populated with the candidate's e-mail address from anywhere in the system

- Assessments attached to those auto-populated candidate e-mails

- Candidate auto req/HR Status e-mail

- eLink blank forms (only when e-mail authentication is turned on)

- System-generated notifications from Talent Gateways

New Functionality or Replacement

This is new and replacement functionality.

The field **Encoding of System user emails** replaces **Encoding of Emails**.

There is a new setting, **Encoding of Candidate Emails**.

Benefits

The client has the flexibility to set the encoding of e-mails differently for candidates and system users.

Details/Limitations/Known Interactions

There are no known limitations or interactions.

Overview of Implementation

The existing setting for system user email will be extended to the new candidate email setting. The new and existing setting can be changed by Kenexa.

Time Frame of Implementation

This feature is available in Release 10.

Cost

There is no additional cost for this feature.

Visible Changes

There are no visible changes associated with this feature.

User Experience

The setting **Encoding of Candidate Emails** controls the encoding of e-mails generated from the Communications Module and system-generated notifications from the Talent Gateway, as well as anywhere in the system the e-mail address automatically populates with the candidate e-mail (including assessments).

KRB Employee Referral System

This release notes document describes the Kenexa Recruiter BrassRing Employee Referral System which will be available in Release 10.2 on 09/21/2007.

Description

With Release 10.2, Kenexa Recruiter BrassRing introduces a complete Employee Referral System (ERS) for submitting, tracking, monitoring, communicating, and reporting on employee referrals. Searching will be available with Release 11.

KRB's Employee Referral System increases recruiter productivity by automating the employee referral process while maintaining the connection between the referring employee and the referred candidate. It can eliminate the black hole frequently associated with employee referrals by allowing the referring employee to track the status of the referral.

Through KRB's Employee Referral System:

¡ Employees can submit and track their referrals for employment.

¡ Candidates can complete the application process directly from the referral eLink.

¡ Recruiters can view, manage, and report on employee referrals.

¡ Recruiters can communicate easily with referring employees through automatic e-mail notification. ¡ Recruiters will be able to search on employee referrals in Release 11.

The ERS is secure and respects employee and candidate privacy:

¡ It can be implemented with or without single-sign-on (SSO). SSO validates employee access rights and

associates referring employees with their referrals.

¡ It can enforce a data privacy policy by requiring candidates to acknowledge the policy before sending

data to KRB.

¡ It allows organizations to exert close control over update privileges for employee referrals by having

"view" and "update" user privileges as two separate settings.

¡ KRB users have control over their e-mail communications with referring employees.

¡ Organizations can choose to configure automatic referral status updates by e-mail to referring

employees, if desired.

New Functionality or Replacement

This is new functionality.

Benefits

Employee referrals are an excellent source of qualified candidates because good employees refer good candidates. Successful employee referral programs are a low cost-per-hire alternative to other methods of finding candidates. Referrals provide immediate access to high-quality candidates and an overall decreased time-to-hire. Successful referral programs also strengthen the bond between the company and the referring employee.

Kenexa Recruiter BrassRing's Employee Referral System:

¡ Lets the referring employee submit minimal information about the referred candidate and pass it on to

the candidate for completion.

¡ Can be configured to communicate automatically with referring employees about the referral status of

the referred candidate, thereby reducing the administrative burden on the recruiter.

¡ Maintains the referral relationship between referring employee and the referred candidate.

¡ Gives recruiters control over the disposition of multiple submissions of the same candidate.
¡ Accurately tracks who referred the candidate first in the case of multiple submissions of one referred

candidate by different referring employees.

¡ Supports job-specific and jobless referrals.

¡ Lets the referred candidate easily complete the submission in a secure manner on the same or a

different gateway.

¡ Allows recruiters to quickly and easily identify potential candidates from within KRB by looking at the

Referrals in queue page or through the Employee referral output column available on all "candidate" pages.

¡ Eliminates the "black hole" for the referring employee by giving him/her the ability to check the status

of the referral.

Overview of Implementation

The Employee Referral System consists of a dedicated Referral Gateway used with other Talent Gateways (if desired) and Kenexa Recruiter BrassRing. Only full platinum Talent Gateways can be enabled as Referral Talent Gateways.

The ERS can be implemented with different workflows for both the referring employee, who is working through the Referral Gateway, and the referred candidate, who is working through the referral eLink.

Employee Referral Gateway Workflows

The Employee Referral Gateway can be implemented with four different workflows for the referring employee:

¡ No Single Sign On / No Gateway Questionnaire

¡ No Single Sign On / Gateway Questionnaire

¡ Single Sign On / No Gateway Questionnaire

¡ Single Sign On / Gateway Questionnaire

See pages 11 and 22 for more information about referring employee workflows due to different implementation choices.

These features must be activated and configured by Kenexa. Once activated, Workbench certified users can configure most of the interface text displayed to users. See the Kenexa Recruiter BrassRing 10 Workbench Release Notes Addendum 1 for more information about these configuration steps.

Candidate Referral eLink Workflows

There are several possible variations in referral eLink flow due to combinations of implementation choices: Is the referred candidate directed to the Referral Gateway (in other words, the same gateway as the referring employee) or to a different Talent Gateway? Does the gateway use Gateway Questionnaire? What are the Start page settings, Data privacy settings, Job-specific or jobless submission settings, and so forth.

Referral/Candidate Same TG

After clicking the referral eLink, the referred candidate starts his or her workflow on one of three pages, depending on your organization's implementation choices: the Questions/Forms page, the Resume/CV page, or Search jobs page of the Referral Gateway from which the submission originated.

In all cases, if the referring employee submits profile information for the candidate, such as first name, last name, and e-mail address, the profile information is retained.

If the referring employee submits a resume/CV for the candidate, that resume/CV is ignored and the
Resume/CV page appears blank to the candidate.

Table 1: Elink takes candidate to the originating Referral Gateway

RG/TG Same/Different	Start Page	Job-specific/Jobless Submissions and Question Method
RG/TG are the same GQ	Questions / Forms	If the referring employee submitted the referral for a specific job or jobs, the candidate sees the job-specific questions on the Questions/Forms page. If the referring employee submitted a general referral (not to a specific job), the candidate sees the default site questions. This workflow ignores any job-specific GQ associated with the job posting.
RG/TG are the same GQ	Resume/CV	If the referring employee submits a referral for a specific job or jobs, the job-specific questions are displayed to the candidate on the Questions/Forms page. If the referring employee submitted a general referral (not to a specific job), the candidate sees the default site questions. This workflow ignores any job-specific GQ associated with the job posting or the Referral Gateway.
RG/TG are the same GQ	Search jobs	For both job-specific and jobless submissions, the Referral Gateway presents job-specific questions associated with the jobs displayed to the referred candidate on the Questions/Forms page. If the referring employee submits a referral for a specific job or jobs, the job-specific questions from the original employee submission is ignored.
RG/TG are the same Non-GQ	Questions / Forms	If the referring employee submitted the referral for a specific job or jobs, the candidate sees the job-specific questions on the Questions/Forms page.
		If the referring employee submitted a general referral (not to a specific

		job), the candidate sees the default site questions. Note: The referring employee questions for a non-GQ flow questions are always ignored for the referred candidate flow.
RG/TG are the same Non-GQ	Resume/CV	If the referring employee submitted the referral for a specific job or jobs, the candidate sees the job-specific questions on the Questions/Forms page. Note: The referring employee questions for a non-GQ flow questions are always ignored for the referred candidate flow.
RG/TG are the same Non-GQ	Search jobs	For both job-specific and jobless submissions, the Referral Gateway presents job-specific questions associated with the jobs displayed to the referred candidate on the Questions/Forms page. If the referring employee submits a referral for a specific job or jobs, the job-specific questions from the original employee submission is ignored. Note: The referring employee questions for a non-GQ flow questions are always ignored for the referred candidate flow.

RG = Referral Gateway

TG = Talent Gateway

Candidate Different TG

After clicking the referral eLink, the referred candidate starts his or her workflow on one of three pages, depending on your organization's implementation choices: the Questions/Forms page, the Resume/CV page, or Search jobs page of the designated Candidate Talent Gateway.

In all cases, if the referring employee submits profile information for the candidate, such as first name, last name, and e-mail address, the profile information is retained.

If the referring employee submits a resume/CV for the candidate, that resume/CV is ignored and the Resume/CV page appears blank to the candidate.

Table 2: Referral eLink takes candidate to a different Talent Gateway

RG/TG	Start Page	Job-specific/Jobless Submissions and Question Method
RG/TG are different	Questions / Forms	If the referral was submitted for a specific job or jobs, the job-specific questions from the original employee submission are ignored.

GQ or Non-GQ		The candidate sees the default site questions on the Questions/Forms page for the designated candidate Talent Gateway regardless of how the referral was submitted (to job or jobless). This workflow ignores any GQ associated to site general job submission for this Talent Gateway.
RG/TG are different	Resume/CV	If the referring employee submits a referral for a specific job or jobs, the job-specific questions from the original employee submission are ignored.

GQ or Non-GQ		The candidate sees the default site questions on the Questions/Forms page for the designated candidate Talent Gateway regardless of how the referral was submitted (to job or jobless). This workflow ignores any GQ associated to site general job submission for this Talent Gateway.
RG/TG are different GQ or Non-GQ	Search jobs	If the referring employee submits a referral for a specific job or jobs, the job-specific questions from the original employee submission is ignored. For job-specific submissions, the candidate-designated Talent Gateway presents job-specific questions associated with the jobs displayed to the referred candidate on the Questions/Forms page. If a GQ is present, the TG uses any GQ associated to the selected job postings. If the candidate applies to either a single-GQ-job or to multiple jobs with same GQ associated, the candidate's profile information is pre-populated in each case. At the end of the submission, the candidate clicks Close to close the GQ window. The main TG window displays a confirmation message from the Referral Gateway. This affects the application flow from the View jobs/job details page and from the Search results page. If the candidate applies to multiple jobs different apply processes (at least one GQ), the Selected jobs page appears. Non-GQ job application workflow: When the candidate clicks Submit on final page,

		he or she is taken back to the Selected jobs page. The Selected jobs page is updated. GQ job application workflow: This workflow is the same as for the non-referral workflow except for closing the Gateway Questionnaire. At the end of all job application workflows, when the Selected jobs page indicates that the submission is complete for all jobs and the candidate clicks Continue, the Referral Gateway displays the referred candidate confirmation message.
RG/TG are different TG is Basic	Questions / Forms	The candidate sees the default site questions on the Questions/Forms page for the designated candidate Talent Gateway regardless of how the referral was submitted (to a specific job or jobless).
RG/TG are different TG is Basic	Resume/CV	The candidate sees the default site questions on the Questions/Forms page for the designated candidate Talent Gateway regardless of how the referral was submitted (to a specific job or jobless).

Date Privacy Referral Candidate Workflows

The privacy policy flow is the same for Referral Gateways and other Talent Gateways and behave according to their privacy policy configuration.

Referred Candidate Accepts Privacy

This section describes the referred candidate's workflow when Data privacy is enabled and the referred candidate accepts the privacy policy.

After clicking the referral eLink, if the Referral submission setting is set to Data privacy, the candidate sees the privacy policy question first, even if there is a setting for Referred candidate eLink start page. The displayed privacy policy is associated with the Referral Gateway, even if the candidate eLink designated Talent Gateway is different.

If the referred candidate accepts the privacy policy consent question, he or she starts the application flow based upon the Referred candidate eLink start page setting.

When the referred candidate clicks Submit, the referral submission is sent to KRB and no longer remains on the Talent Gateway.

Referred Candidate Declines Privacy Policy

This section describes the referred candidate's workflow when Data privacy is enabled and the referred candidate does not accept the privacy policy.

After clicking the referral eLink, if the Referral submission setting is set to Data privacy, the candidate sees the privacy policy question first, even if there is a setting for Referred candidate eLink start page.

The displayed privacy policy is always associated with the Referral Gateway, even if the candidate eLink designated Talent Gateway is different.

If the referred candidate declines the privacy policy consent question (either the alternative question, or the initial question if no alternative consent question is configured), he or she sees the non-consent message configured for the Referral Gateway.

The referral submission held on the Talent Gateway is purged when the referred candidate declines the privacy policy. When purging occurs, the system sends an e-mail notification to the referring employee. The email subject line and text of this notification can be customized by your organization. Notifications are sent out via a nightly process; they are not sent in real time.

Referred Candidate's Referral eLink Expires

This section describes the referred candidate's workflow when Data privacy is enabled and the referral eLink has expired.

When the referred candidate referral eLink expiration occurs prior to the referred candidate completing his or her submission, the referral submission held on the TG side is purged based on the expiry time stamp calculation or expiry click calculation, whichever expires first.

The expiry time stamp and expiry click stamp are attached to the submission held on the TG at the time of employee submission.

The expiry time stamp calculation is based on your organization's settings for expiration times.

Details / Limitations / Known Interactions

There are several possible implementations of the Employee Referral System that affect how your organization's Employee Referral System works:

¡ Sign-on method: Is the ERS single-sign-on (SS0) or non-single-sign-on (non-SSO)?

¡ Questions to applicants: Does the ERS use Gateway Questionnaire, or does it use default site

questions?

¡ Referral Gateway / Talent Gateway: Does the referral eLink take the candidate to the originating

Referral Gateway or to a different Talent Gateway?

¡ Data privacy: Is Data privacy enabled or not?

¡ What are the displayed names of your Referral statuses and who can see them and update them? ¡ What are the rules for Referral expiration?

¡ How does your organization accommodate forms attachment? Do users embed forms in the referral

eLink or attach forms to the Additional information page?

¡ What is your organization's Site general submission type?

¡ If candidates use a different gateway for completing the application process initiated by an employee

referral, what is the Gateway Type Full Platinum or Basic?

¡ What kinds of text messages has your organization customized for the Referral Gateway and the

designated Candidate Talent Gateway (if applicable)?

¡ What is the user experience for the Referring employee, Referred candidate, and KRB users

(Recruiters)?

The next several sections briefly describe the constraints and the main implementation choices that determine the functioning of the Employee Referral System.

Disabled Functionality on Referral Gateways

Several features available on non-referral Talent Gateways are disabled for Referral Gateways: These features include, the Job cart, Send to a friend, and Search agents, Resume/CV manager, and job submission withdrawal.

Non-SSO or SSO

In a non-single-sign-on implementation, ERS users must log in separately to the Referral Gateway.

Single-sign-on (SSO) changes the login, authentication, and validation procedures for users of the Employee Referral System because it automatically logs in the user while maintaining increased security by passing employee data securely from the client's internal system to the Talent Gateway.

Non-GQ or GQ

Organizations can create questions and embed them in the referral eLink, add them to the Additional information page which is presented to candidates in the application workflow, or do both.

Organizations that use Gateway Questionnaires can select a GQ for presentation to the candidate in the application workflow.

Both implementations can be used in combination when the referral gateway/designated candidate gateway are the same or when they are different. Both implementations can be used on non-SSO and SSO

Gateways.

See page 6 for more information about the workflow for different implementations of the Employee Referral System.

Referral Gateway and Candidate Gateway Same or Different?

Organizations can configure the Referral Gateway to be the designated candidate gateway, or they can select a different Basic or Full Talent Gateway to be the designated candidate gateway.

Data Privacy

Organizations can choose to enable or not enable Data privacy. When Data privacy is enabled, the gateway presents the privacy policy to the referred candidate as the first step in the apply flow when he or she clicks on the referral eLink. Privacy policy settings apply only to the referred candidate and not to the referring employee.

When Data privacy is not enabled, the referred candidate's information is sent to KRB immediately following the referring employee's submission.

When Data privacy is enabled, the referred candidate's information is held on the Referral Gateway until the candidate accepts the privacy policy and completes his or her portion of the submission. If the candidate does not accept the privacy policy, the candidate's information is not sent to KRB and is purged from the Referral Gateway.

When the referral eLink directs the candidate to a different Talent Gateway, and Data privacy is enabled, the candidate sees the privacy policy of the originating Referral Gateway.

Referral Expiration Management

Organizations must decide the conditions for referral expiration. There are three settings for referral expiration: Referral eLink expiration clicks; Referral expiration time in days, hours, and minutes; and Referral rights expiration; in addition to the effect of updates on referral

expirations. These settings determine when the referral eLink and referral rights automatically expire.

Duration Period to Hired Update

The Duration period to Hired update is set at the time of referral submission.

Note: If your organization chooses N/A for this setting and then changes it later, referrals already in the system prior to the setting change do not change to Hired . The changed settings affects only new referral submissions.

Forms attachment

Your organization can choose to embed forms for the candidate to complete in the referral eLink or attach them to the Additional information page in the candidate's workflow.

Site General Job Submission Type

The setting, Site general job submission type, determines the behavior of GQ vs non-GQ Referral Gateways.

The type of Referral Gateway (SSO vs. Non-SSO) and your organization's choice for Site general job submission type determine what type of questions are used for the job submission.

¡ If set to a specific Gateway Questionnaire, the Referral Gateway uses this GQ for all submissions. ¡ If set to Resume/CV, the Referral Talent Gateway respects the questions configured in the Referring

employee questions for Non-GQ flow field and ignores job-specific GQs for the referring employee submission flow.

SSO Referral Gateway with Specific GQ

Your organization can select a specific GQ as part of the Site general job submission type to accompany all Referral Gateway submissions.

For SSO Referral Gateways, if the Site general job submission type is set to a specific Gateway Questionnaire, the Referral Talent Gateway uses this GQ for all submissions.

SSO Referral Gateway with Resume/CV

Your organization can select Resume/CV as the Site general job submission type. In that case, the Referral Gateway uses the non-GQ questions associated with this application flow and ignores any job-specific GQs that exist.

No Account Creation/Login

The No account creation/no log in applies only to Employee Referral Gateways that use SSO. If your ERS is a non SSO type, users are required to log in before they submit a referral.

Employee and Candidate Start Options

You can configure Referral Gateways in an increasingly restrictive manner so that employees can do one of the following:

¡ Search for jobs and submit the referred candidate's resume/CV for a particular vacancy.

¡ Submit the referred candidate's resume/CV but not search for jobs.

¡ Provide minimum information about the referred candidate, such as referral first name, referral last

name, and referral e-mail address through a Gateway Questionnaire, but not search for jobs or upload a resume/CV.

You can configure Referred candidate designated Talent Gateway to allow the candidate to:

¡ Search for jobs, submit their resume/CV, and answer questions.

¡ Submit their resume/CV and answer questions only.

¡ Answer questions only.

Referred Candidate Access from the Referral eLink

The referred candidate is automatically logged in through the referral eLink based on the credentials passed in the referral eLink. Referred candidates:

¡ Do not see a progress bar.

¡ Cannot use the Job search agent or the Job cart functions.

¡ Cannot use the Save as draft function.

¡ Do not see attachments submitted by the referring employee.

Once the referred candidate completes the submission, the referral eLink expires.

Updated Profiles on Non-SSO Referral Gateways

The login for non-SSO Referral Gateways is shared across other non-SSO Talent Gateways. When referring employees update their profiles (First name, Last name, Contact e-mail address), these updates are reflected on all Gateways for which they have a login.

Candidate Reference Numbers

Depending on your organization's configuration choices, some Talent Gateways e-mail a candidate reference number to the candidate upon receipt of the submission. The candidate reference number will be sent to the candidate if the designated Talent Gateway is configured as such.

Hiding Search Openings and Featured Jobs

Your organization can choose to hide Search openings and Featured jobs from the referring employee at the individual Talent Gateway level. Recruiters can still post jobs to the Talent Gateway but they do not display on the Referral Gateway.

KRB Users Cannot Select a GQ on the "Edit posting options" Page

KRB users cannot select the Gateway Questionnaire field on the Edit posting options page for the Referral Talent Gateway.

Time Frame of Implementation

This feature is available September 21, 2007 in Release 10.2, except where otherwise noted.

Cost

There is no direct cost associated with this feature. However, it requires the dedicated use of a full platinum gateway, so there may indirect costs if additional gateways are needed or if your organization chooses to use SSO integration, and/or Gateway Questionnaire. Please refer to your existing contract for pricing of these features, or consult your Kenexa representative.

Visible Changes

When the ERS is activated, the visible changes within Kenexa Recruiter BrassRing are:

¡ New menu item, Referrals in queue, in the Candidates menu (visible only to users with the appropriate

privileges). (See pages 15 and 31).

¡ New tab on the Talent Record, Referral status (see pages 16 and 32).

¡ New Referral history page/grid (see page 17).

¡ New output field, Employee referral, on all candidate pages (see page 16).

¡ New search options (available in Release 11, April 2008). See page 20.

¡ New DEW (Data Export Wizard) category, Employee referral (see page 17).

¡ New Resume/CV filter page for Referral status (see page 19).

The visible changes within Talent Gateways are:

¡ The new dedicated Referral Gateway, as described in this document.

New Menu Item: Referrals in queue

Kenexa Recruiter BrassRing users with the appropriate user privileges for accessing employee referrals will see the new menu item, Referrals in queue, in the Candidates menu. Clicking Referrals in queue takes you the Referrals in queue page. See page 30 for more information.

Figure 1: Candidates Menu: Referrals in queue

New Talent Record Tab: Referral status

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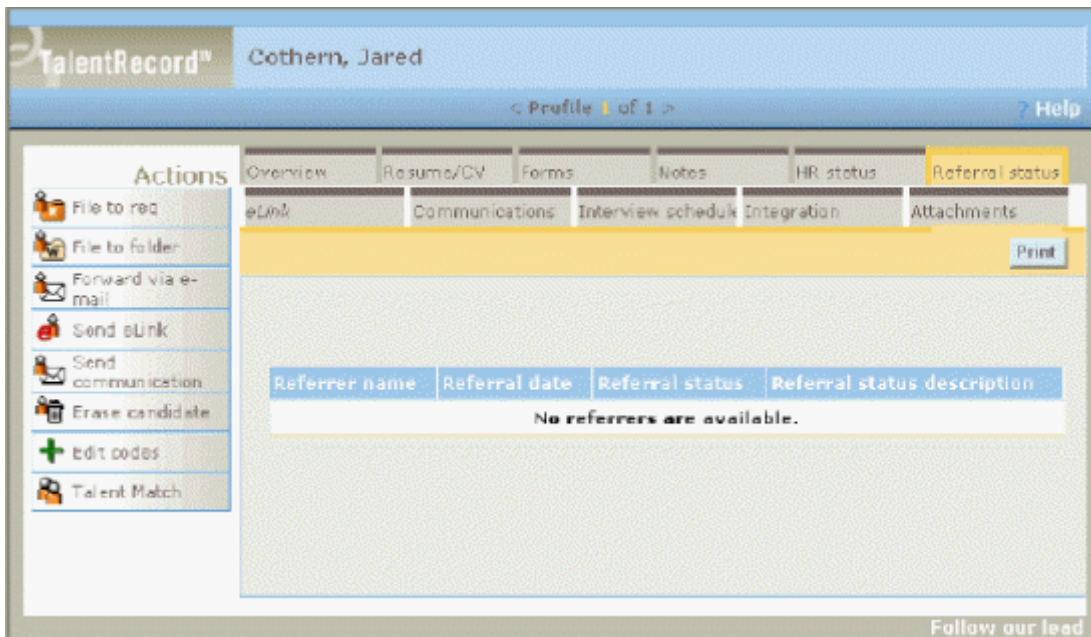
The Talent Record has a new Referral status tab.

Figure 2: Referral status tab on the Talent Record

Edit Output Fields on All Candidate Pages

Users with the appropriate user privileges can see and use a new output column which is viewable on all candidate listing pages and which is available as an output option on the Edit output fields page. The column displays the Employee referral icon for those referred candidates who have an "active" Referral status.

Your organization can configure which referral statuses are considered "active." When a candidate has one of those statuses the Employee referral icon will display. The Employee referral icon links to the Referral history page (see page 17).
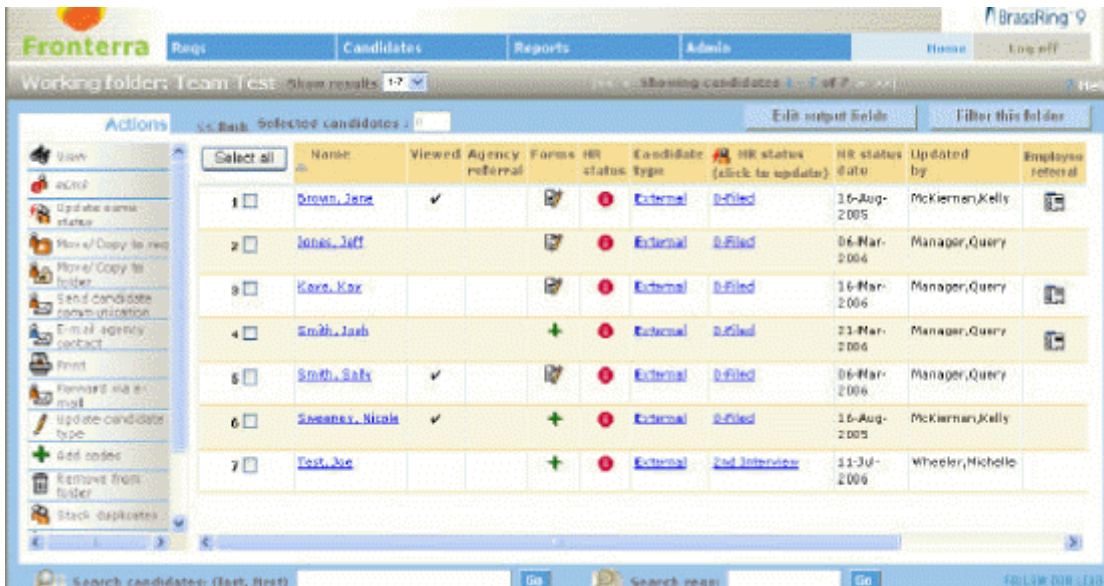
Figure 3: Employee referral Output Column on all Candidate Pages

Referral History Page

The individual candidate's referral history is displayed on the Referral history page. To access the Referral history page, click the Employee referral icon on any page in the system that outputs a list of candidates. Appropriately privileged users can update the Referral status from Referral history for the candidate.
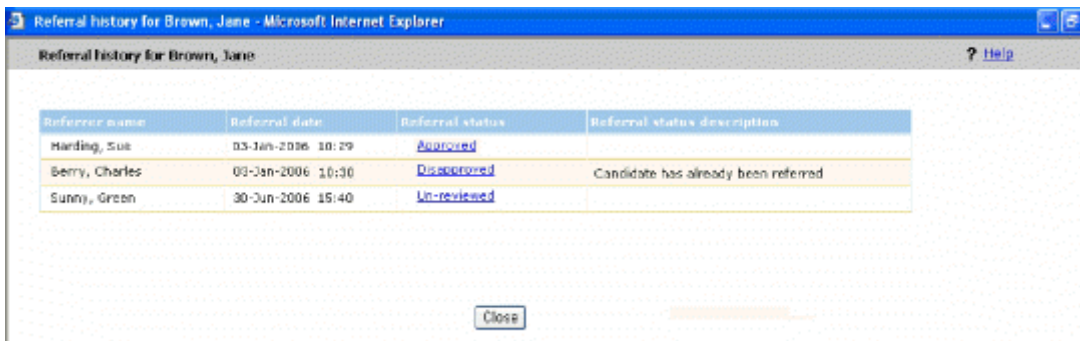
Figure 4: Referral History for a Referred Candidate

New DEW category: Employee referral

The Available fields list in the Data Export Wizard (the DEW) has a new field category called Employee referral. The following fields are associated with it: Referral submission date, Referral status, Referral status date, Referral status description, and Referrer name.
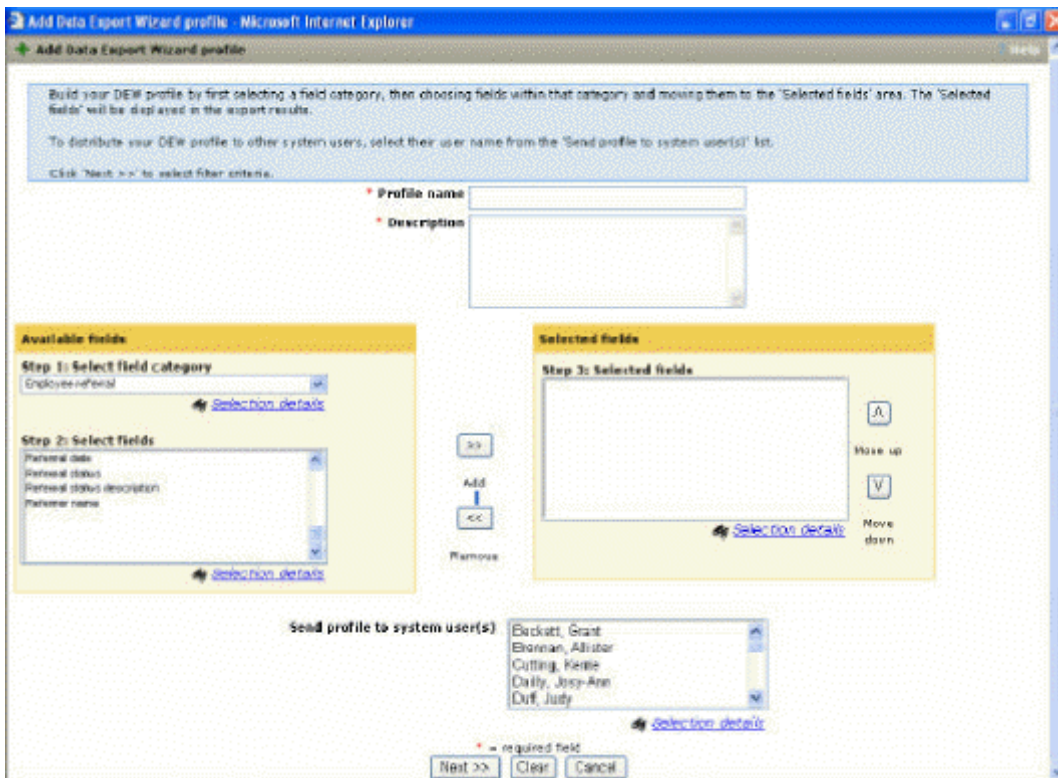
Figure 5: New Employee Referral Category in the Data Export Wizard

New Resume/CV Filter Page for Referral Status

The Resume/CV filter page has a new option called Referral status. Your organization may have customized labels for referral statuses, and if so, those labels display in the Referral status multi-select list
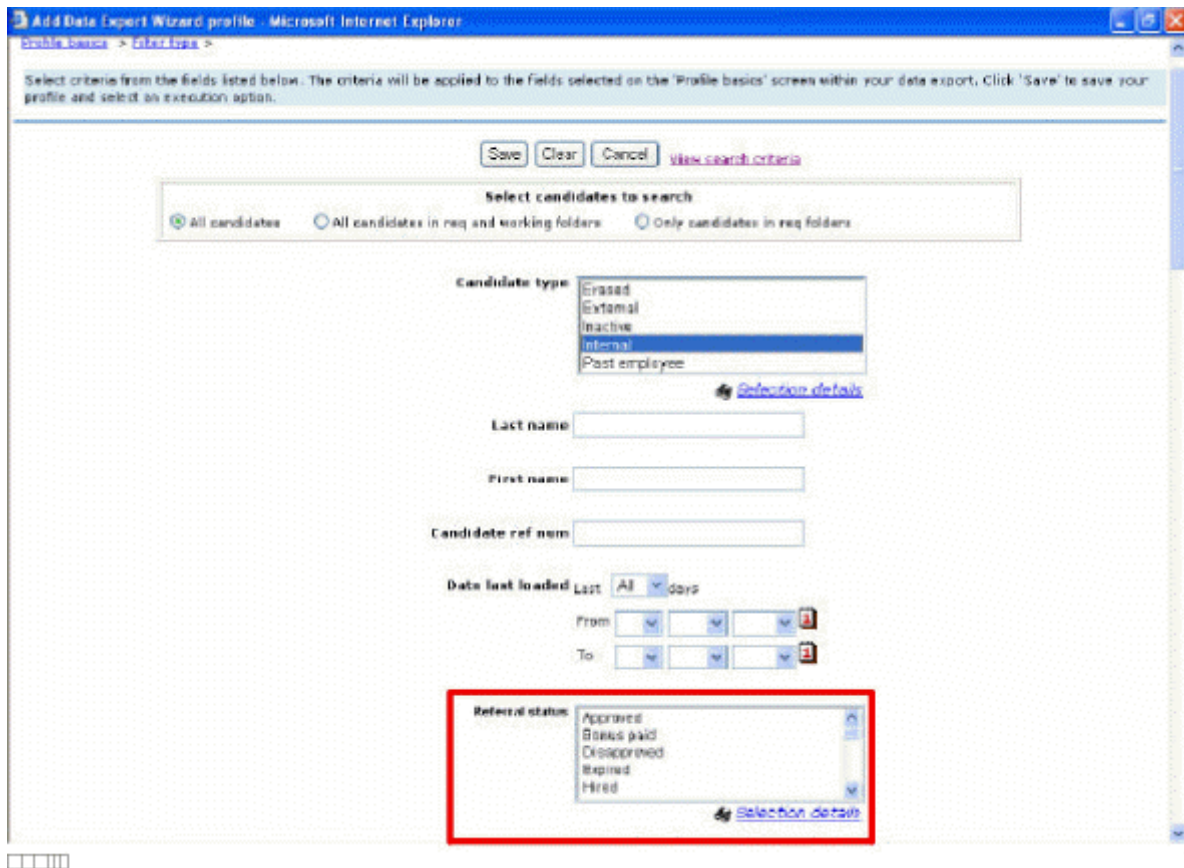
Figure 6: Referral Status Option on the Resume/CV Filter Page

New Search Options

Note: The new search options will be available with Release 11 in April, 2008.

Kenexa is adding new search options to the Edit search page for the functions associated with the Search and Filter folder buttons (for users with the appropriate privileges). The two new search fields are Referral status and Referral status date.

Figure 7: New Search Fields for Search and Filter Folders

Referral status: You will be able to search for candidates in one or more referral statuses.

Note: Your organization can customize the labels for all these statuses so you might see different statuses listed in the selection box.

Referral status date: You will be able to search for candidates whose referral statuses were updated during a particular date range and/or number of days back.

User Experience

This section describes the user experience for referring employees, referred candidates, and Kenexa BrassRing Recruiter users.

Referring Employee Experience

The referring employee's experience depends on the type of Referral Gateway he or she encounters: If the Gateway is single-sign-on (SSO) or not, if it uses a Gateway Questionnaire (GQ), if there forms attached, and how your organization has customized text on the Gateway, and so forth.

For non-SSO Referral Gateways, the employee must log in and create an employee profile consisting of their First Name, Last Name, and Contact e-mail address. For SSO Referral Gateways, the employee's information is automatically populated.

The referring employee's submission flow always starts on the Employee profile page.

Your organization can configure the Referral Gateway in a variety of ways allowing the employee to:

¡	Search for jobs and submit the referred candidate's resume for a particular vacancy. Note: Your organization can choose to hide search openings and featured jobs on the Talent Gateway even when the Gateway has jobs posted to it. When this option is selected, the employee cannot search for jobs or select jobs for the job cart. In addition, the referring employee and the candidate cannot check the status of the job referral even when status check is configured for the Talent Gateway.
¡	Submit a resume/CV for the referred candidate but not perform a job search
¡	Provide minimum information such as referred candidate's first name, last name, and e-mail address, but not perform a job search or upload a resume/CV.

Referring Employee's Submission Flow

The referring employee's workflow depends on your organization's configuration choices at implementation time. The general submission flow for the referring employee is:

1. Log in to or access the Referral Gateway depending on gateway type.
2. Complete the referring employee's portion of the application process.
3. Submit the information.
4. An eLink is sent automatically to the referred candidate's Contact e-mail address.
5. If your organization has turned on the Status check feature and allows referring employees to search

   jobs, the referral is listed on the Referral status check page. See the Kenexa Recruiter Brassring 10 Release Notes (KRB10-RN-Revision#1-08-16-2007) for more information about Status check.

When the referring employee submits the referral information, the system sends an eLink in an e-mail to the referred candidate. The referred candidate clicks the eLink to complete the submission process (see page 14 for more information about the referred candidate's workflow). The eLink contains identifying information that maintains the connection between the referring employee and the referral.

In addition, your organization may choose to turn on automatic notifications which are sent to the referring employee. The Employee Referral System automatically sends a notification to the referring employee when the status of the referral is changed.

Different Referring Employee Workflows

Non-SSO / Non-GQ Workflow
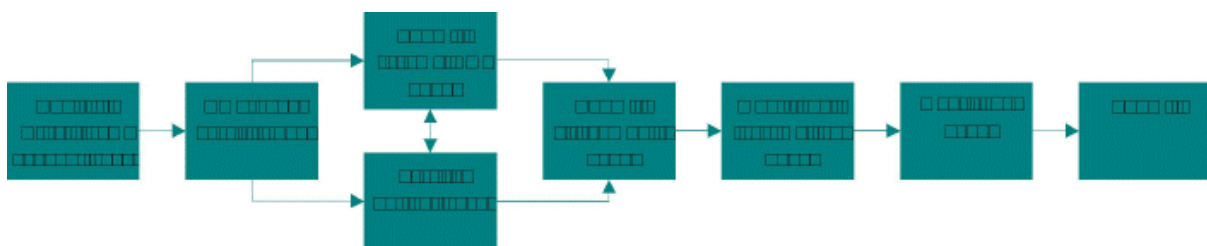
If your Referral Gateway is non-SSO and does not use the Gateway Questionnaire, referring employees proceed through the following workflow :

1. Login / Create new account page. The referring employee lands on the Referral Gateway's Login / Create new account page. The referring employee either logs in. or creates a new account and logs in to start entering the referral information.
2. Employee profile page. The referring employee must complete the required employee profile

fields: First name, Last name, and Contact e-mail address.

3. Submit resume/CV page or Profile builder page. Your organization's selections at implementation time determine which page displays next in the referring employee's workflow.
4. Submit attachments page. If it is configured for the Gateway, the referring employee can submit attachments for the referred candidate at this point in the workflow.
5. Additional information page. The referring employee can supply additional information about the referred candidate on this page.
6. Questions page. The Referral Gateway displays questions specifically configured for referring employees submitting a referral on a non-GQ Referral Gateway.
7. Submit the referral. The referring employee completes the referral and clicks Submit, which sends the referral link to the candidate assuming that your organization has configured the referral link, and the referring employee has provided the candidate's e-mail address.

Non-SSO / GQ Workflow

If your Referral Gateway is non-SSO and uses the Gateway Questionnaire, referring employees proceed through the following workflow:

1. Login / Create new account page. The referring employee lands on the Referral Gateway's Login / Create new account page. The referring employee either logs in or creates a new account and logs in to start entering the referral information.
2. GQ login page. The referring employee logs into the GQ login page.
3. Employee profile page. The Employee profile page displays within a pop-up window for the GQ.

   The referring employee must complete the required employee profile fields before he or she is allowed to continue: First name, Last name, and Contact e-mail address.

4. Gateway Questionnaire. The site-level GQ is launched for both jobless and job-based submissions.
5. Submit the referral. The referring employee completes the referral and clicks Submit, which sends

the referral link to the candidate assuming that your organization has configured the referral link, and the referring employee has provided the candidate's e-mail address

SSO / Non-GQ Workflow

If your Referral Gateway is SSO and does not use the Gateway Questionnaire, referring employees proceed through the following workflow:

1. Company Home page. The referring employee lands on your organization's home page.
2. Employee profile page. The fields on this page are pre-populated with the referring employee's

   profile information.

3. Submit resume/CV page or Profile builder page. Your organization's selections at implementation time determine which page displays next in the referring employee's workflow:

4. Submit attachments. If it is configured for the Gateway, the Submit attachments page displays in the usual sequence in this workflow.
5. Additional information page. The referring employee can supply additional information about the referred candidate on this page.
6. Questions. The Referral Gateway displays questions specifically configured for referring employees submitting a referral on a non-GQ Referral Gateway.
7. Submit the referral. The referring employee completes the referral and clicks Submit, which sends the referral link to the candidate assuming that your organization has configured the referral link, and the referring employee has provided the candidate's e-mail address.

SSO / GQ
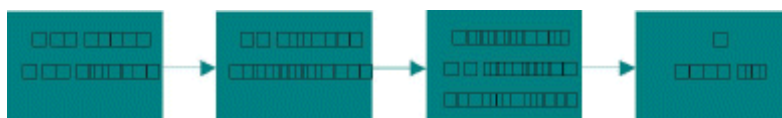
If your Referral Gateway is SSO and uses the Gateway Questionnaire, referring employees proceed through the following workflow:

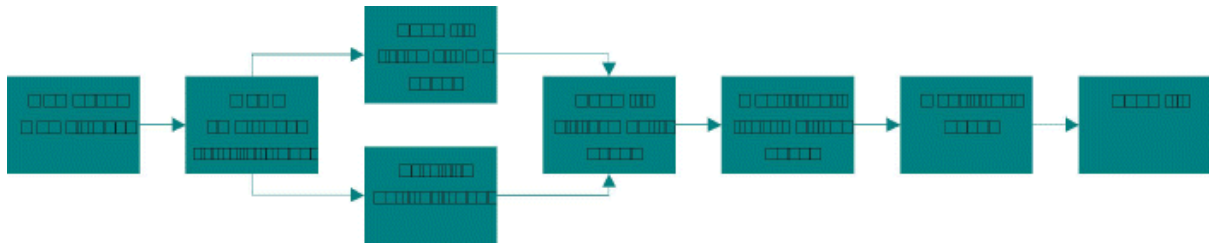1. Company Home page. The referring employee lands on your organization's home page.
2. Employee profile page. The Employee profile page displays within a pop-up window for the GQ.

   The referring employee must complete the required employee profile fields before he or she is allowed to continue: First name, Last name, and Contact e-mail address.

3. Gateway Questionnaire. The site-level GQ is launched for both jobless and job-based submissions.
4. Submit the referral. The referring employee completes the referral and clicks Submit, which sends

   the referral link to the candidate assuming that your organization has configured the referral link, and the referring employee has provided the candidate's e-mail address.

Logging in to the Referral Gateway

The exact login sequence depends on whether your Referral Gateway is non-single-sign-on (non-SSO) or single-sign-on (SSO).

For non-SSO Referral Gateways, the employee must log in and create an employee profile consisting of their First name, Last name, and E-mail address.

Figure 8: Login Screen for a Non-SSO Referral Gateway

For SSO Referral Gateways, the employee is logged in automatically. The employee's profile information is automatically populated on the landing page.

Welcome, Carole Smart !

? Help

Search openings
Do you want to refer a friend? View all current opportunities or search on specific criteria that will match your referral's interests.

Submit referral resume/CV
Do you want to refer a friend? You may use this feature to send your referral's resume without submitting to a specific job.

Referral status
You have submitted a referral? Check the status of your referral here.

Figure 9: Landing page for an SSO Referral Gateway

The referring employee always sees the Employee profile page after logging in. The page title and introductory text for this page are configurable, so what the referring employee sees on this page depends on your organization's configuration.

? Help

Employee profile

Employee profile intro text displays here

Continue   Cancel

*First name: *Last name: *Contact e-mail address:
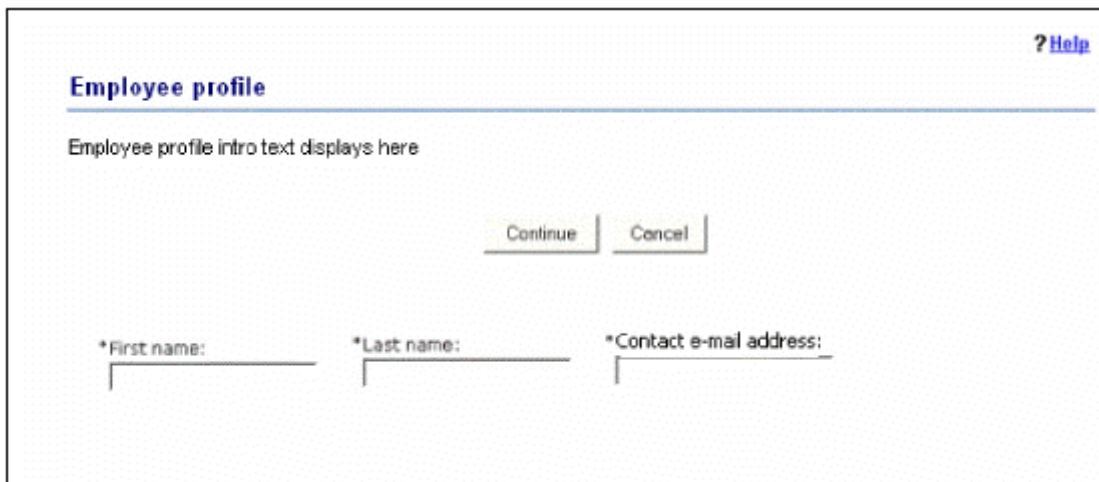
Figure 10: Referral Gateway Employee profile Page

Referral Gateway Landing Page

Once you are logged in, you will see a landing page similar to the one below:
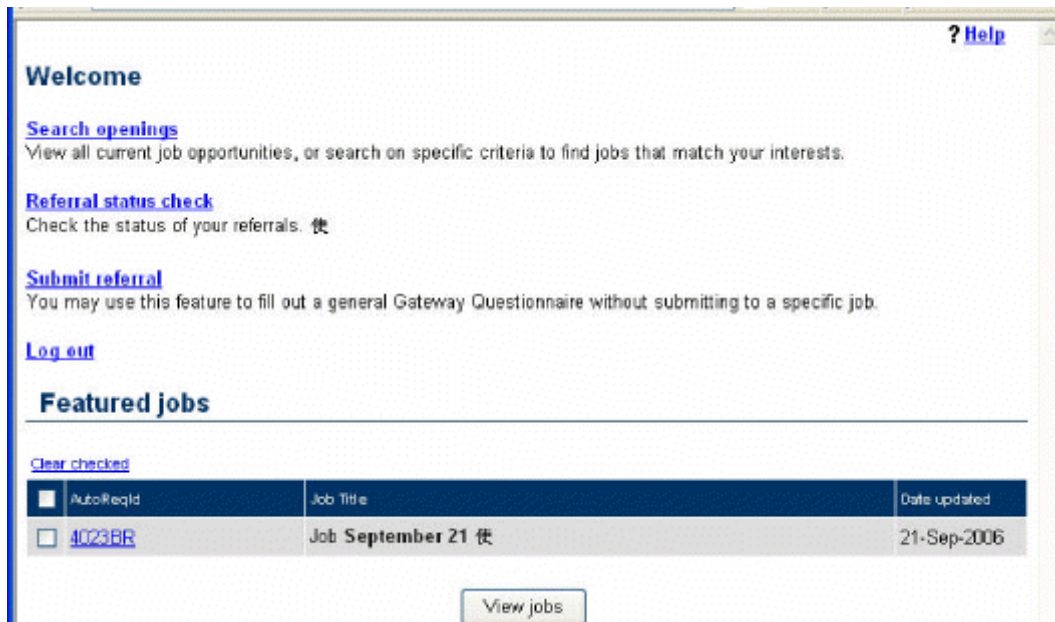
Figure 11: Landing logged in Page of One Type of Referral Gateway

From this page the referring employee can view featured jobs, search job openings, submit a referral, and perform a referral status check.

Note: Some organizations do not allow referring employees to search for jobs, see featured jobs, or check the status of a referral.

Check the Status of a Referral

If your organization chooses to use the Status check feature, referring employees can check on the status of their referrals through the Referral Gateway through which it was submitted. They can view their submissions immediately after submitting them or at any time in the future.

Note: Kenexa must enable Status check for the Referral Gateway and permit referring employees to search jobs for Status check to be operative.

The default referral statuses are: Un-reviewed, Approved, Disapproved, Expired, Hired, and Bonus paid. Your organization can customize all referral statuses, so you might see different statuses on the Referral status check page.

Configurable employee referral columns: Your organization can customize the titles of the columns listed below for referring employees to view and sort, so you might see different column titles:

¡ Referral submission date

¡ Job requisition ID

¡ Job title

¡ Referral name

¡ Referral status

¡ Referral status description

¡ Referral start date
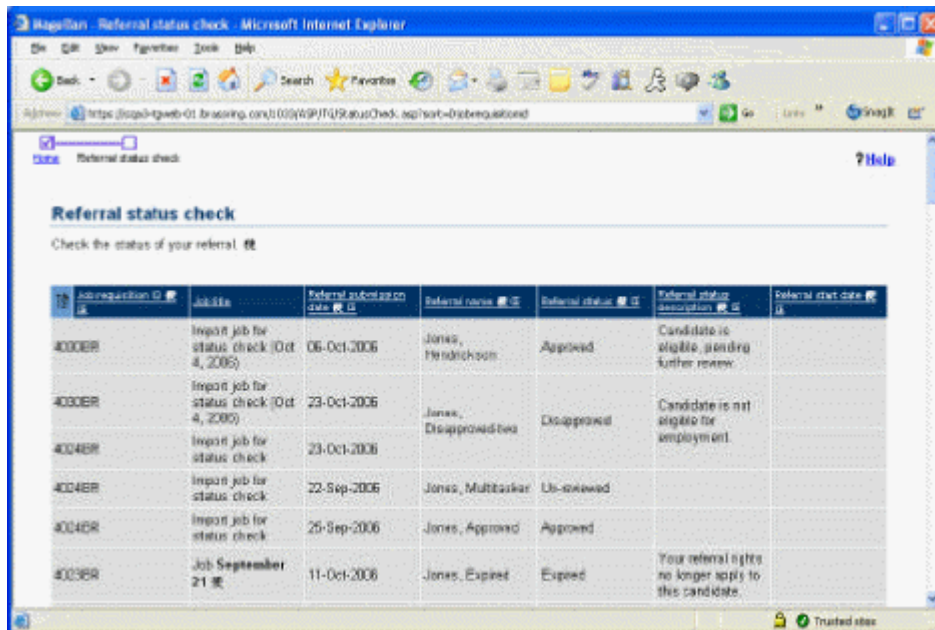
Figure 12: Referral status check Page

Length of Time End Statuses are Displayed

The Closed req status displays for six (6) months after the req is closed.

The Cancelled req status displays for six (6) months after cancellation.

The Final HR status assigned displays for one (1) year after assignment.

Status Change E-mail Message to Referring Employee

The referring employee can receive an automatic e-mail notification with each change in referral status if your organization has configured this feature. Your organization can configure a different message per referral status and choose which statuses the email

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notification should be sent, as well as customize the subject line and message for each referral status.

Figure 13: E-mail notification of referral status changes
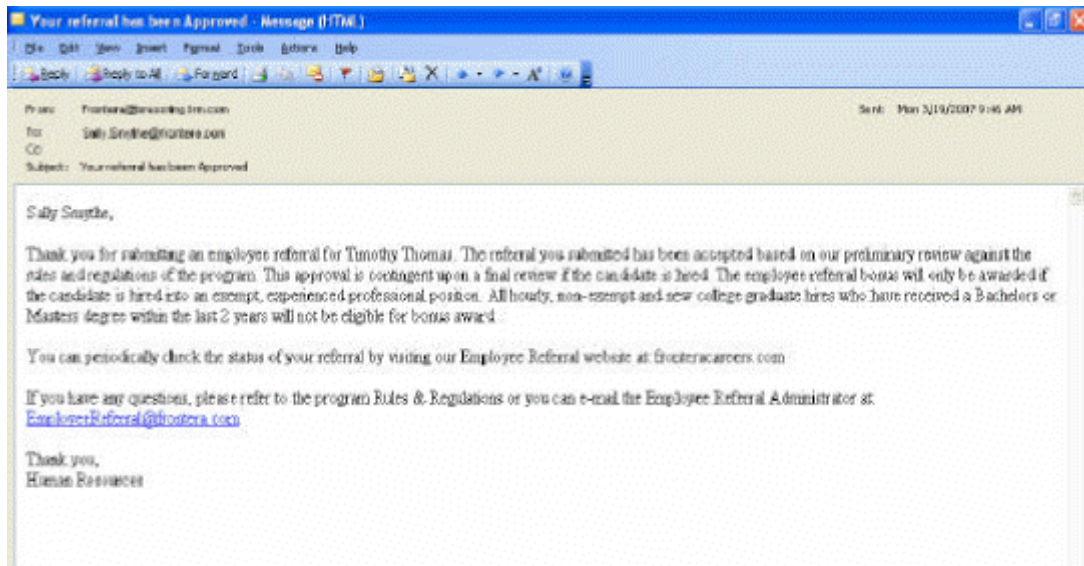
Referred Candidate Experience

This section describes how the referred candidate interacts with the Employee Referral System.

After the referring employee submits the referral, the referred candidate receives an e-mail notification with information about the referral and an eLink to either the original Referral Gateway or to a separate Talent Gateway, depending on your organization's choices at the time of setup.

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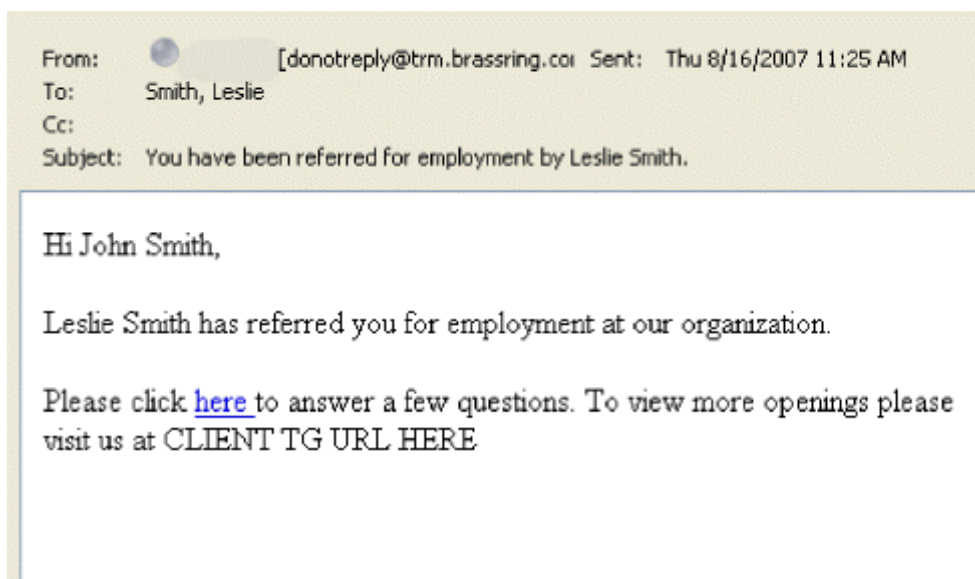
Figure 14: Notification e-mail to referred candidate with referral eLink

When the referred candidate clicks the eLink, s/he is automatically logged in to the Gateway based on the unique identifying information contained within the eLink.

The referred candidate may have to read and accept a privacy policy as the first step in continuing the application process, depending on your organization's choices. See the next section for more information.

The candidate starts the submission workflow on one of three pages, depending on your organization's choices at setup: Forms/Questions/Forms page, Resume/CV page, or Job Search. See page 7 for more information.

When the candidate completes the application and submits the information through the Gateway, the Talent Record is updated in KRB with the new information.

Enforcing a Data Privacy Policy

The Referral Gateway can be configured for data privacy policy enforcement.

A Data Privacy Referral Gateway requires that the referred candidate accept the privacy policy before the submission is sent to Kenexa Recruiter BrassRing.

For Data Privacy Referral Gateways, the referred candidate must answer privacy policy questions in the first step in the submission flow.

Once the referred candidate accepts the privacy policy, s/he completes the remaining steps in the application workflow and submits it to Kenexa Recruiter BrassRing.

If the referred candidate declines the privacy policy, the Referral Gateway does not send the candidate information to KRB and the information is purged from the Talent Gateway. The Talent Gateway sends an e-mail notification to the referring employee stating that his/her referral is no longer valid.

Data Privacy Options

Organizations that elect to use Data privacy with their Referral Gateway can choose one of two data privacy configurations for enforcing the Data privacy policy when the candidate clicks the eLink:

One option (eLink Data privacy required) displays the Privacy policy statement on the first page. The other option (eLink Data privacy with question) displays the Privacy question on the first page. In this case, the candidate has a choice of two responses: If the candidate answers the question in a manner that bypasses the data privacy requirement, the bypass is treated as an acceptance and the candidate can continue to log

in.

Data Privacy Enabled, Questions/Forms eLink Start Page, but no Questions/Forms

When Data privacy is enabled, the referred candidate's eLink Start page is the Questions/Forms page, but the eLink has no questions or forms attached to it, the referred candidate's referral eLink workflow is as follows:

The referred candidate clicks the referral eLink which contains no questions or forms. The candidate accepts the privacy policy, or answers the privacy question to bypass the privacy policy, depending on your organization's implementation choices). The Referral Gateway displays a message to the candidate saying there are no questions. The candidate record from the original referral submission is then submitted to Kenexa Recruiter BrassRing.

Referred Candidate ELink Start Page

When the referred candidates click the referral eLink he or she is directed to either the Referral Gateway or an external Talent Gateway to complete the application process. The start page for the application process is one of three pages depending on other options selected by your organization: Questions/Forms (the default setting), Resume/CV, or Search jobs.

Recruiter Experience (in KRB)

Within Kenexa Recruiter BrassRing, you track referral candidates by their referral status. Each referral submission has its own referral status. There are six standard referral statuses: Un-reviewed, Approved, Disapproved, Hired, Bonus paid, and Expired). Your organization can customize labels for all referral statuses.

Referrals in Queue

Once the referring employee completes his/her portion of the referral submission, the referred candidate is listed on the Referrals in queue page. KRB creates a Talent Record for the referred candidate with the minimum amount of information included in the original submission. The referring employee does not have access to either of these pages.

Candidates remains in the Referrals in queue until their referral status for the submission is updated.

Referrals in queue displays:

¡ Newly submitted candidates (Un-reviewed).

¡ Any referral manually updated to Un-reviewed.

¡ Subsequent submissions for previously Disapproved referrals (provided Retain referral status setting is

turned on for this status).

¡ Subsequent submissions for any referral in a status where Retain referral status setting is Un-checked

(which means candidate status will be updated to "Un-reviewed" with subsequent. submission). ¡ Subsequent submissions of any referral candidate at any referral status other than Disapproved

will NOT appear in Referrals in queue listing.

If the referral status for single employee referral is updated to any status other than Un-reviewed (that is, from Un-reviewed to any other, non-Unreviewed, status; or from Disapproved to any non-Unreviewed status, including Disapproved), the referred candidate is removed from the Referrals in queue listing.

If multiple referrals exist for the same candidate, this candidate will appear multiple times in the Referrals in queue list. When a KRB user updates a single referral, that one instance of the candidate's name is removed from the Referrals in queue list. When all referrals for that candidate are updated, the candidate is completely removed from queue.

Working with Referrals in Queue

KRB users with the appropriate user privileges can view and update referral status information. (Note: There are two separate user privileges for viewing and updating referrals.)

¡ To view the employee referrals within the Referrals in queue, follow these steps:

Note: You can access the referred candidate from other locations in KRB (such as search results) by clicking the Referral status icon when viewing the candidate. You can also use the Data Export Wizard (DEW) to run reports on the status of referrals. With Release 11, in April 2008, you will be able to search on referral statuses from within Candidate search and Filter folders.

1. Log into Kenexa Recruiter BrassRing.
2. Select Candidates > Referrals in queue.
3. The Referrals in queue page appears. The Selected candidates grid includes the referred

   candidate's name, whether the candidate has been viewed or not by the user, the date added, and the forms attached.

Figure 15: Referrals in queue page

KRB time-date-stamps all employee referrals for tracking. All new referral submissions display in the referral queue until their referral status is updated.

New referral submissions are automatically assigned the Un-reviewed referral status upon entering KRB. Once the status has been updated, the candidate record no longer displays in Referrals in queue.

A candidate appears once in the queue for each referrer who submitted. (That is, if two different employees submit the same candidate, the candidate is listed twice; but if one employee submits the same candidate twice, the referred candidate is listed only once.)

4. Click the candidate's hyperlinked name to view the Referral status tab of the candidate's Talent Record. Alternatively, select the check box beside the candidate's name and click View in the Actions menu.
5. Click the Forms icon to see which forms are attached and how far they have been filled out.
6. Update the referral status in order to either Approved, Disapproved (or to whatever your

   organization's customized labels are for these two statuses).

Talent Record™ Referral status tab

The Talent Record has a new tab called Referral status which tracks the following information: Referrer name, Referral submission date, Referral status, Referral status date, Referral status description, and Updated by.

Each referral submission is displayed in its own row on the Referral status tab.

The most recent name for the referring employee displays if the referring employee's name has changed, as long as the ID is the same.

E-mail notifications sent to the referring employee use the most recent name for the referring employee if the name is derived from name tokens. They also use the most recent e-mail address listed when sending referring employee e-mail notifications.

The Referral status date column shows the date the referral status was updated to the current status for each referral.

The"Updated by column shows the user who updated the referral status to the current status for each

referral.

Automatic and Manual Updates to Referral Status

Your organization has three choices for updating referral statuses, so what happens in your system depends on these choices. Referral statuses can be set to Automatic update only, Manual update only (by a KRB user), or Automatic and Manual (update by the system and KRB user).

The Un-Reviewed, Hired, and Expired referral statuses are the only statuses which can be configured to be updated automatically. Your organization can turn off automatic updating for the Hired and Expired referral statuses. In that case, you and other KRB users would update these two statuses manually. The third option for updating these referral statuses is a mixture of both system and manual updates by KRB users. If this option is selected, the designated status will appear to appropriately privileged KRB users on the update referral status screen.

Your organization can choose to have the system update a referral status automatically to Expired when the referral rights expiration period ends. If a referral is in Approved status, it does not automatically update to Expired status if the candidate is in an Open req folder in a start or intermediate HR status or the HR status which has been designated to trigger the automatic update to the Hired referral status

Your organization can also choose to use a trigger that automatically updates a referral status automatically to Hired within a specified number of days of updating a designated HR status which "triggers" the referral status update.

When the system updates referrals in the Un-reviewed status automatically, each update of that type is listed as a System Submission.

When the system updates referrals in the Hired or Expired statuses automatically, each update of those two types is listed as a System Integration.

Manually Updating Referral Statuses

KRB users with the appropriate user privileges can update the referral status anywhere that you can access the candidate record in KRB.

To update the Referral status and/or the Referral status description, navigate to the Referral status tab of referred candidate's Talent Record. The referral status is the actual referral status,

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the referral description is optional supporting information (which is configurable) as to why the candidate may have been updated to the selected Referral status.
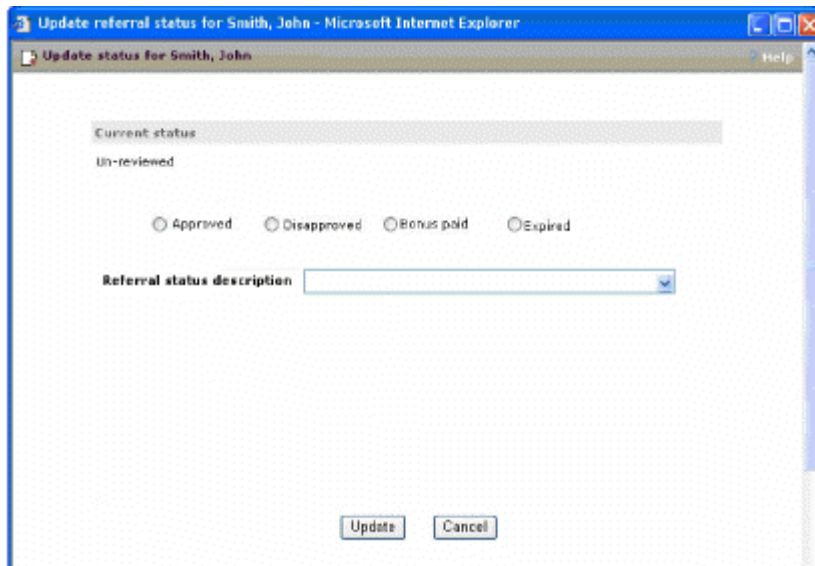
Figure 16: Update Referral Status for a Candidate

Click Referral status link for the candidate. Select the appropriate Referral status and Referral status description (should you want to provide additional information to support the referral status) and click Update.

All referrals will automatically update to Un-reviewed upon entering KRB. However, your organization can enable a setting that causes a resubmitted referred candidate from the same employee to retain their current referral status rather than updating to Un-reviewed. The statuses which display as options for update are dependent upon your configuration.

If a user updates the referral status from somewhere other than the Referrals in queue, the candidate record is automatically removed from the Referrals in queue the moment the referral status is updated.

KRB can be configured to send an automatic e-mail notification to the referring employee when the referred candidate's referral status is updated.

Duplicate Referral Submissions

If a referring employee makes a duplicate referral submission, the system responds depending on your organization's choices at setup. Either the duplicate submission retains the current existing referral status, or it updates the referral status to Un-reviewed (in other words, it starts the process of reviewing that candidate over again.)

Here is an example of the referral flow if your organization decides to retain a currently existing status when a referring employee makes a duplicate submission:

Assume your organization decides to retain the Disapproved referral status. The referral candidate's most recent referral status was Disapproved. The referring employee submits that candidate again as a new referral. The resubmitted candidate's new referral submission status automatically updates to Disapproved instead of Un-reviewed.

Referral Status Expirations

Recruiters may wonder, "How can I be sure a candidate's Referral Status will not be updated to Expired when it should remain active?"

The system automatically updates a referral status to Expired when the following conditions are met:

¡ It is one (1) day beyond the configured referral rights expiration period after a referral candidate was

first submitted AND

¡ The referral candidate is in Approved referral status AND ¡ The referral candidate is not in a start or intermediate HR status within an Open requisition.

The candidate may be in an Open req folder, but if s/he is at a final HR status that is not hired, then the referral status updates from Approved to Expired on the day following the configured referral rights expiration period. An e-mail is sent to referring employee at that time if one has been configured by the organization.

Should the referral reach the configured referral rights expiration period and the candidate has an Approved referral status and is in an Open req folder with a start or intermediate HR Status, the referral status will not automatically update to Expired until the candidate is either removed from the req folder or updated to a final HR status or updated back to 0-Filed HR status. See the following table:

Table 3: Expiration of Candidate's Referral Status

Candidate's Referral Status/HR Status	Is Candidate Updated to Expired?
Approved + in req folder + start or intermediate HR status	No
Removed from req folder	Yes
Updated to final HR status	Yes
Updated back to 0-Filed HR status	Yes

Configurable Gateway Questionnaire Labels

Description

Users who administer Gateway Questionnaires (GQs) can add or edit a GQ display label for each data field pulled from a form. GQ display labels are text fields that can contain up to 255 characters. Users can define a separate GQ display label for the same GQ data field in each language available for the GQ.

Populating GQ Label Fields

You define GQ display labels for each instance of a Gateway Questionnaire because each questionnaire is targeted to a unique candidate audience.

GQ objects (also called "Widgets") can be of four types: Question, Text, Graphic and Resume. When you create a Gateway Questionnaire, you can choose how to populate the labels for each GQ field of the "Question" type.

Options are not customizable: You cannot customize options associated with fields to which you have applied custom labels. An example of options are the items in a list box from which the candidate selects an answer. Each option retains its original value for display.

Best practice recommendation: Kenexa strongly recommends you use GQ labels to change only the style of the question and not the meaning of it because candidate answers are associated with the original form labels provided by default in Kenexa Recruiter BrassRing.

New Functionality or Replacement

This is new functionality.

Time Frame of Implementation

This feature is available in Release 10.

Cost

There is no additional cost for this feature.

Visible Changes

None.

User Experience

GQ Content within the KRB Application

Within Kenexa Recruiter BrassRing, the Gateway Questionnaire form displays all configured GQ display labels because the GQ form is intended to capture the full candidate response as the candidate entered it.

KRB users cannot search for, report on or export GQ display labels via the Data Export Wizard (DEW).

GQ Usage

If you have defined one or more GQ custom labels in a GQ, the custom labels are displayed along with each respective data field in place of the form field labels. (In other words, once the custom label is defined, it replaces the original form field label for the data field it is the label for.) The candidate sees the custom label when he or she completes the GQ.

If no GQ display labels have been defined, the candidate sees the form field label that is associated with the question by default.

Hide "Notify users" Option for HR Status Updates

Description

A new setting has been added to turn off the "**Notify users working with this candidate**" checkbox field on the **Update HR Status** page.

When this setting is turned on, the "Notify users working with this candidate" checkbox is hidden for all users anywhere the HR status update options display, such as the **HR status update**, **file to folder**, **file to req**, **Move to folder/req**, and **Copy to folder/req** pages.

This setting affects the following pages in Kenexa Recruiter BrassRing:

HR status update

File to folder

File to req

Move to folder

Move to req

Copy to folder

Copy to req

and anywhere that HR status update options display.

New Functionality or Replacement

This is new functionality.

Benefits

Your organization can choose to hide this field and reduce unnecessary communication between team members when an HR status is updated.

Time Frame of Implementation

This feature is available in Release 10.

Overview of Implementation

This feature is activated by Kenexa.

Cost

There is no additional cost for this feature.

Visible Changes

There are no Visible Changes without configuration.

User Experience

In Kenexa Recruiter BrassRing, the "**Notify users working with this candidate**" checkbox is hidden for all users anywhere the HR status update options display is located, such as the **HR status update**, **file to folder**, **file to req**, **Move to folder/req**, and **Copy to folder/req** pages.

Figure 25: Update status window with "Notify users ..." checkbox hidden

Capturing Original TG Posting Data

Kenexa is changing the data model to capture additional posting information for requisitions effective in late September, 2007.

The changed data model will capture the entire posting history for a requisition for each Talent Gateways site: original posting date, subsequent updates and actual removal date.

This is a 'forward-looking' change: Historical posting data prior to the data model change will not be available for reporting.

If your organization receives data via a feed you can update your integration with a 'TG posting history' file in your existing integration files. Please contact Kenexa for more information and details.

Time Frame of Implementation

This feature will be completed in Release 11 and will provide access to the captured data from within Kenexa Recruiter BrassRing through the standard Talent Gateway report.

Diversity Breakdown Report

Description

To support changes to EEO-1 format (required as of September 2007), Kenexa modified the report settings for the Diversity breakdown report to match the revised EE0-1 report, which has several new job and race categories. Your organization can run the Diversity Breakdown report and use the output to satisfy its EEOC reporting requirements.

To further assist you in gathering all of your EEO data, using both previous and newly created job and race categories, Kenexa has updated the report settings to allow you to map inactive form values to the new categories within the Diversity Breakdown report. Please contact your Kenexa Recruiter BrassRing representative for more information about this new capability.

Kenexa has also added "Candidate type" to the report so that you can run the report for a specific candidate type.

New Terminology

The revised report includes several changes to Job categories and Race categories as described in the sections below.

Changes to Job Categories

The **Job category** section has the following changes:

A new job category, **First/Mid-Level Officials and Managers**

Several renamed Job categories:

Table 14: New and changed job categories

Job category	Description
Executive/Senior Level Officials and Managers	Formerly called "Officials and Managers." Renamed but no other changes
First/Mid-Level Officials and Managers	New job category
Administrative Support Workers	Formerly called "Office and Clericals." Renamed and no other changes
Operatives	Formerly called "Operatives (Semi-Skilled)." Renamed and no other changes
Craft Workers	Formerly called "Craft Workers (Skilled)." Renamed and no other changes

Laborers and Helpers	Formerly called "Laborers (Unskilled)." Renamed and no other changes
Service Workers	Moved from left to right column

Changes to Race Categories

The `Race` section has the following changes to Race categories:

Table 15: New and changed Race categories

Field	Description
Asian	Renamed from "Asian or Pacific Islander" to "Asian" and no other changes. Your organization's existing choices for this category will be retained.
Black or African American	Renamed from " Black (not of Hispanic origin)" to " Black or African American " and no other changes. Your organization's existing choices for this category will be retained.
Hispanic or Latino	Renamed from "Hispanic" to "Hispanic or Latino" and no other changes. Your organization's existing choices for this category will be retained.
Two or more races	New race category. Your organization can designate one or more options from a single form field to map to this or any specific race category.
American Indian or Alaska Native	Renamed from "American Indian or Alaskan Native" setting to "American Indian or Alaska Native" and no other changes. Your organization's existing choices for this category will be retained.
Native Hawaiian or other Pacific Islander	New category. Your organization can designate one or more options from a single form field to map to this or any specific race category
White	Renamed from "White (not of Hispanic origin)" setting to "White" and no other changes. Your organization's existing choices for this category will be retained.

New Functionality or Replacement

This is replacement functionality.

Benefits

Your organization can continue to use Kenexa Recruiter BrassRing's Diversity Breakdown report for your EEO-1 filing without a transition period.

You can run reports for targeted candidate populations using the new Candidate type filter.

The reorganization of the "unknown" data streamlines the report output.

You may now report on active and inactive field options so that no data are lost.

Limitations / Known Interactions

Accumulations in the former "Officials and Managers" job category will be counted in the "Exec/Sr. Level Officials and Managers" job category.

Accumulations in the former "Asian or Pacific Islander" race category will be counted in the "Asian" race category.

Candidates without gender and race data will not be returned in the in the report.

The old format has not been available since the week of June 28th, 2007.

Overview of Implementation

This new report format is automatically available to all Kenexa Recruiter BrassRing clients as part of the Standard Reports offering the week of June 28th, 2007. The old report format will be retired at that time.

Changes to the configuration settings for this report must be made by Kenexa.

Time Frame of Implementation

The new report format replaces the previous one on June 28th, 2007.

Best Practice Recommendations

Kenexa advises you to run the report just prior to the new format deployment. Your organization should evaluate your existing race and job categories and update forms with the new job and race categories where appropriate.

Cost

There is no additional cost associated with this feature.

Visible Changes

The new report output has been in place since the week of June 28th for all clients. Users will see the new and changed Job and Race categories on the report.

The new report does not affect scheduled reports. The report results e-mail includes a note explaining the format change.

Configuration and Setup

None.

User Experience

Diversity Breakdown Report

The Diversity Breakdown report displays gender and race information broken down by job category. You can select multiple data sources within Kenexa Recruiter BrassRing, allowing a single report to be used for multiple divisions, locations and countries.

You can view Race and Gender information for candidates in all HR statuses. Gender and Race information in this report are derived from candidate form fields selected for Diversity breakdown report settings.

Your security privileges determine which Diversity breakdown report filters you can see. Your organization can choose to switch Location, Department, Hiring manager and Recruiter filters and fields with other fields on the req form. Therefore, you might see a different group of filters and fields.

Please contact your Kenexa representative for more information about filter and field configuration for this report.

Uses

Analyze and track your organization's race and gender information across job categories.

Report Filters

Please note, the Diversity breakdown report filters are the same as in the previous release except for the **Candidate type** filter, which is new in this release. We provide a description of each filter here for your convenience.

The **Candidate type** filter allows you to report on diversity data across specific candidate/ applicant pools.

Table 16 Diversity breakdown report filters

Filter	Description
Date ranges (Not changed)	Date range can be selected by using the dropdown lists or calendar, or by choosing one of the predefined options. Predefined options are based on calendar year. Please note that a maximum date range of 366 days may be selected. The date range can be one of the following: Begin date / End date Month to date Previous calendar month Calendar quarter to date Previous quarter (for equivalent time period) Previous quarter (all) Calendar year to date Previous year (for equivalent time period) Previous year (all)
Location (Not changed)	Standard field on the req Form (location/division) also referred to by some organizations as Region, Division, etc. This standard filter can be switched for another custom or standard req field. Security is applied to this filter, so only users with access to this field on the req will see it as filter criteria.
Department (Not changed)	Standard field on Req Form also referred to by some organizations as business unit, division, business acronym, etc. This standard filter can be switched for another custom or standard req field. Security is applied to this filter, so only users with access to this field on the req will see it as filter criteria.
Hiring manager (Not changed)	Derived from Req Form. This standard filter can be switched for another custom or standard req field. Security is applied to this filter, so only users with access to this field on the req will see it as filter criteria.
Recruiter	Derived from Req Form. This standard filter can be switched for another custom or standard req field. Security is applied to this filter, so only users with access to this field on the req will see it as filter criteria.
Req ID/ AutoReq ID or a client-supplied label (Not changed)	Refers to the unique ID for the requisition. In some cases this number is auto-generated. The filter label is based on your organization's label for the req ID field. Security is applied to this filter. The req list uses the My/All req viewing privileges, so if you have only the View My open reqs privilege, the req. ID filter will contain only a list of your open reqs.
HR status (Not changed)	Represents your organization's configuration of HR status names.

Candidate type (New)	This is a new filter on the **Diversity breakdown filter** page. Your organization can use it to better report on diversity data across specific candidate/applicant pools. This filter is not required. The default value is All. The selection list for **Candidate type** is a multi-select list. The list contains all available standard and custom candidate types that exist your organization, displayed in alphabetical order. A maximum of 25 candidate types can be selected. If the KRB user has selected more than 25 filter options, when he or she clicks **Generate now** or **Schedule report**, the Reports Module displays the following error message: "Maximum "Candidate type" selections: 25. Please refine your selections." Click **OK** to close the message window. **Report output when this filter is selected:** When a candidate type is selected as a filter, the report returns counts of candidates broken down by job category, race and gender for candidates belonging to the candidate type selected within the filter within the selected timeframe (and meeting any other filter criteria). **How the filter determines Candidate type:** To determine the candidate's Candidate type when generating the report, the filter looks at the Candidate type associated with the candidate prior to the most recent "hired" action being taken. **Example 1:** I may be an "Internal" candidate now, but my candidate type before I was moved to the "hired" status was "External" and therefore I would be classified as "External" for the report. **Example 2:** I am an "Internal" candidate now and have been hired for a new position. I should be reported as an "Internal" candidate within the report. **Security:** Candidate type security is applied to this filter. Users executing the report can see only the names of candidate types that they have search privileges for. For example, if a user has privileges to search the "External" candidate type, that user can see "External" and "All" in the filter selection list. (This level of security is already applied in the existing report output). **Users with privileges for no candidate types:** The report filter contains only the "All" option and the report returns no results.

Changes to the Report Output

Kenexa has revised the format of the Diversity breakdown report to comply with the new format of the U.S. government's EEO-1 report, which is in effect starting in September 2007. The new format has the following features:

New and renamed job categories

New and renamed ethnicity categories

Addition of new data headers

Segregation of Hispanic/Non-Hispanic data

Change in report logic to identify Hispanic/Latino candidates first

Removal of "Unknown" columns to a second page

Removal of the disclaimer for the "total" column

The report logic has been updated. The report first looks at the candidate's race categorization. If a candidate is counted in the Hispanic or Latino category, no other checks of race designation are done.

Unless otherwise indicated, all existing security and functionality for the existing report is unchanged.

Report Output

The Diversity breakdown report results are listed by gender, and sub-divided by race / ethnicity for each job category. This report considers race and gender information for candidates filed to requisitions. Candidates must be filed to a requisition to be associated with a job category. The total number of candidates in each gender/race combination for each job category is displayed in the corresponding column. Candidates are counted only once per distinct gender / race / job category combination.

Sorting and Grouping Options

None.

Table 17: Diversity breakdown report details

Field	Description
Job categories	There are several changes to the names for job categories and a new job category. See pages 72 and 73 for a list of changes. The standard job categories are (as of the reporting period beginning September 2007):

			Executive/Senior Level Officials and Managers First/Mid-Level Officials and Managers Professionals Technicians Sales Workers Administrative Support Workers Craft Workers Operatives Laborers and Helpers Service Workers	
Race / Ethnicity	Hispanic or Latino		Candidates counted for this race value have form field responses that correspond to the configured options for the "Hispanic or Latino" Race report setting.	
	Not Hispanic or Latino		Candidates counted for this race value have form field responses that correspond to the configured options for races other than the "Hispanic or Latino" Race report setting. (This includes White, Black or African American, Native Hawaiian or Other Pacific Islander, Asian, American Indian or Alaska Native, or Two or more races.)	
Race / Ethnicity	Hispanic or Latino	Male	[New] Displays the number of males in a job category who identify themselves as Hispanic or Latino. Candidates counted for this gender value have form field responses that correspond to the configured options for the "Male" Gender and "Hispanic or Latino" Race report settings.	
		Female	[New] Displays the number of females in a job category who identify themselves as Hispanic or Latino. Candidates counted for this gender value have form field responses that correspond to the configured options for the "Female" Gender and "Hispanic or Latino" Race report settings.	
			Candidates counted for each Race value have form field responses that correspond to the configured options for report settings for the "Male" Gender and the applicable Race category.	
	Not Hispanic or Latino	Male	White	[Renamed from "White (Non-Hispanic)"] Displays the number of males in a job category who identify themselves as White.

			Black or African American	[Renamed from Black or African American (Not-Hispanic or Latino)] Displays the number of males in a job category who identify themselves as Black or African American.
			Native Hawaiian or Other Pacific Islander	[New] Displays the number of males in a job category who identify themselves as Native Hawaiian or Pacific Islander.
			Asian	[Renamed from "Asian (Not-Hispanic or Latino)"] Displays the number of males in a job category who identify themselves as Asian.
			American Indian or Alaska Native	[Renamed from "American Indian or Alaska Native (Not-Hispanic or Latino)"] Displays the number of males in a job category who identify themselves as American Indian or Alaska Native.
			Two or More Races (Not Hispanic or Latino)	[New] Displays the number of males in a job category who identify themselves as Two or More Races.
			Candidates counted for each race value have form field responses that correspond to the configured options for report settings for the "Female" Gender and the applicable Race category.	
			White	[Renamed from "White (Non-Hispanic)"] Displays the number of females in a job category who identify themselves as White.
			Black or African American	[Renamed from Black or African American (Not-Hispanic or Latino)] Displays the number of females in a job category who identify themselves as Black or African American.
			Native Hawaiian or Other	[New] Displays the number of females in a job category who identify

			Pacific Islander	themselves as Native Hawaiian or Other Pacific Islander.
			Asian	[Renamed from "Asian (Not-Hispanic or Latino)"] Displays the number of females in a job category who identify themselves as Asian.
			American Indian or Alaska Native	[Renamed from "American Indian or Alaska Native (Not-Hispanic or Latino)"] Displays the number of females in a job category who identify themselves as American Indian or Alaska Native.
			Two or More Races (Not Hispanic or Latino)	[New] Displays the number of females in a job category who identify themselves as Two or More Races.
	Total (Sum of columns)			[Existing] It is now the last column in the report. The 'unknown' values have been removed from this report. This column sums the total counts for each row of data in the report with no exclusions. The calculation for each 'job category' row = # Hispanic Males + # Hispanic Females + # White Males + # Black Males + # Native Hawaiian Males + # Asian Males + # American Indian Males + # 'Two or more races' Males + # White Females + # Black Females + # Native Hawaiian Females + # Asian Females + # American Indian Females + # 'Two or more races' Females.

"Unknown" Report Page

Kenexa has added a new page to the Diversity breakdown report for reporting on "unknowns".

Table 18: Unknown report fields

Field	Description

Job categories	There are several changes to the names for job categories and a new job category. See page 72 for a list of changes. The standard job categories are (as of the reporting period for 2007): Executive/Senior Level Officials and Managers First/Mid-Level Officials and Managers Professionals Technicians Sales Workers Administrative Support Workers Craft Workers Operatives Laborers and Helpers Service Workers
Gender unknown / Hispanic	Candidates counted for this race category have form field responses that correspond to the configured options for the "Hispanic or Latino" Race report setting, but do not have responses that correspond to either configured Gender setting.
Gender unknown / Non-Hispanic	Candidates counted for this race category have form field responses that correspond to the configured options for races other than the "Hispanic or Latino" Race report setting. (This includes White, Black or African American, Native Hawaiian or Other Pacific Islander, Asian, American Indian or Alaska Native, or Two or more races.) They do not have form field responses that correspond to either Gender setting.
Race unknown / Male	Candidates counted for this gender category have form field responses that correspond to the configured options for the "Male" Gender, but do not have form field responses corresponding to any Race report settings.
Race unknown / Female	Candidates counted for this gender category have form field responses that correspond to the configured options for the "Female" Gender, but do not have form field responses corresponding to any Race report settings.
Total (Sum of columns)	This column sums the total counts for each row of data in the report. The calculation for each 'job category' row = # Gender Unknown Hispanic + # Gender Unknown Not-Hispanic + # Race Unknown Males + # Race Unknown Females
Total (row)	This column sums the total counts for each column of data in the report. The calculation for each Race/Ethnicity column = # Executive/Senior Level Officials and Managers + # Mid/First-Level Officials and Managers + # Professionals + # Technicians + # Sales Workers + # Administrative Support

	Workers + # Craft Workers + # Operatives + # Laborers and Helpers + # Service Workers

Effect on Existing Report Schedules

You will see the new report automatically: All KRB users with existing report schedules will automatically see the new report output in the scheduled report e-mail results.

No existing schedules will be voided: Because the changes being made to this report affect only the report output and not the filter criteria used to generate the report, existing schedules are not voided.

The report results e-mail tells you about the new report format: The scheduled report results e-mail associated only with the Diversity breakdown report, not with any other reports, alerts users to the change in the report layout: "Please note: To correspond with the new layout of the US EEO-1 report on which it is based, the format of the Diversity Breakdown report has been revised."

New Hire Report

Previously, this report could only pull candidate source from the standard source code table. With this release, your organization can choose to use codes from a different code table or a candidate form. This same setting will now apply to both the New Hire report and the Source Yield report.

Open Req Activity Report

Description

The Open req activity report shows how many positions remain to be filled.

Kenexa has added a "Positions remaining" column to the report output, and is modifying the report layout to include the "Positions remaining" column.

The current report layout is being modified to fit the new "Positions remaining" column. The new column is between the "No of positions" and "Candidates in req folder" output columns. "Positions remaining" for each req will be displayed in this column for all output formats.

The Subtotal of "Positions remaining" with for each group will be displayed in the Total row. The Subtotal of positions remaining is displayed only for output formats that have grouping applied, such as PDF and formatted Excel.

New Functionality or Replacement

This is new functionality.

Benefits

The count of positions remaining provides valuable requisition information to clients.

Details/Limitations/Known Interactions

The "Positions remaining" column reflects the current number of positions remaining at the time the report is run. The date range applied to the report does not modify this data. The "Positions remaining" count is consistent with all other counts returned in report.

Overview of Implementation

This feature is automatically available to all clients now.
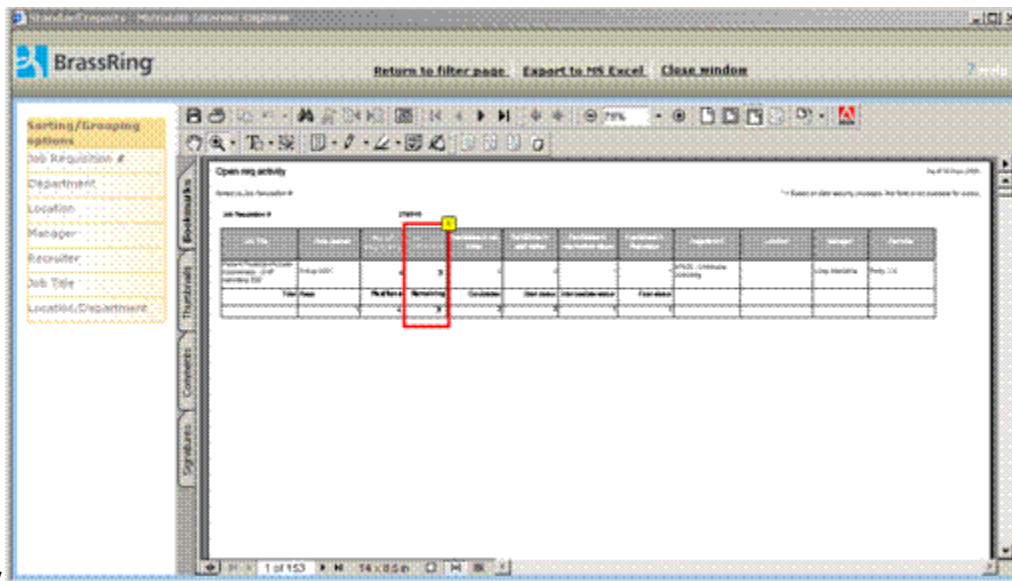
Time Frame of Implementation

This feature is available now.

Cost

There is no additional cost associated with this feature.

Visible Changes

All users with access to this report will see this output field in the Open req activity report, including individuals receiving report via scheduling.

Figure 27
: Open req activity report: Positions remaining column

The report output displays "Positions remaining" for each requisition in PDF and in Excel sortable.

1. Log in to Kenexa Recruiter BrassRing.

2. Select **Reports** > **Standard Reports**. The Standard Reports page displays.

3. Scroll to and click the **Open req activity report.**

4. Select your filter criteria.

   ☐ Select **Acrobat (.pdf)** as the output format.

   ☐ Click **Generate report**. The **Positions remaining** column displays the number of positions remaining for each requisition.

The report output in Excel sortable displays "Positions remaining" for each req:

Log in to Kenexa Recruiter BrassRing.

   ☐ Select **Reports** > **Standard Reports**. The Standard Reports page displays.

   ☐ Select your filter criteria.

   ☐ Select Excel Sortable (.xls) as the output format.

☐ Click **Generate report**. The **Positions remaining** column displays the number of positions remaining for each requisition.

In the Excel Sortable format, the positions remaining count are listed in the column against each requisition but are not sub-totaled.

You can sort the report output by any of the output columns.

QlikView Interactive Reports Export

Description

QlikView is an exported standard report file for use with a desktop QlikTech product. It may be a significant addition to our existing set of reporting tools.

Kenexa is creating an early adopter program to better evaluate our client interest in this product (and whether we should invest in more discovery on hosting it within KRB).

Organizations purchasing this solution will receive a daily file transfer (via FTP) containing a standard, yet highly interactive report with key data sets across their KRB system.

Your organization can apply multiple filters against and drill down into your KRB data to gain deeper insight into their hiring processes.

You may choose to purchase a custom report in this interactive export delivery mechanism.
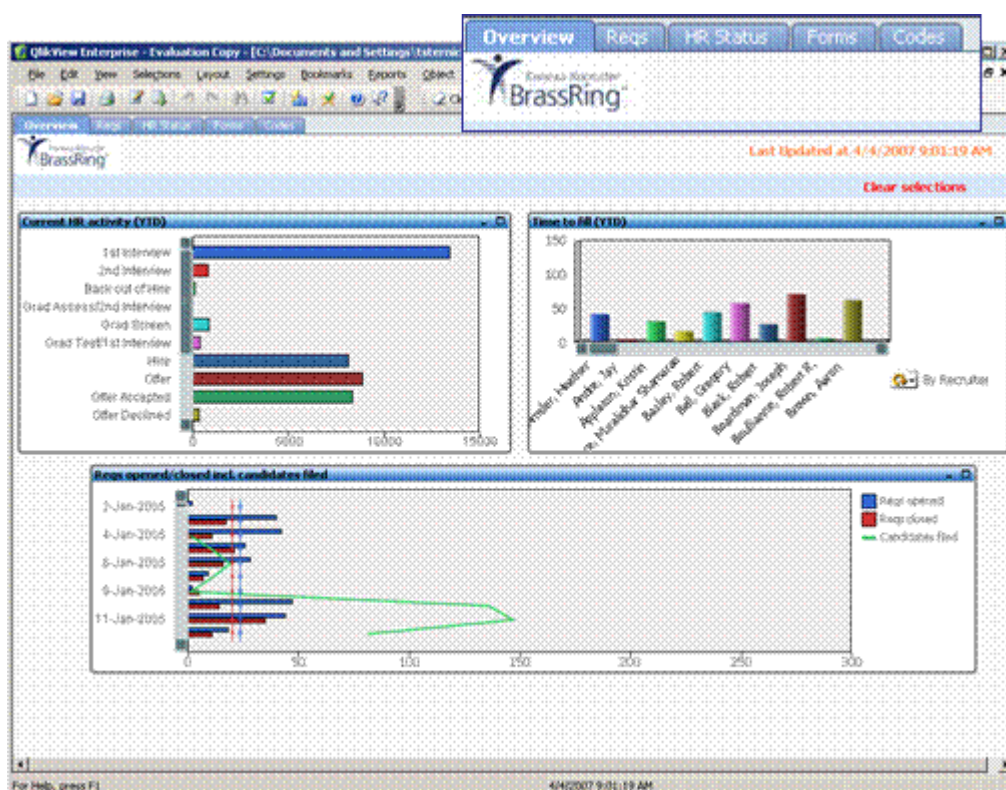
Figure 28: QlikTech interactive reports export

New Functionality or Replacement

This is new functionality.

Benefits

QlikView is an innovative *ad hoc* analytics technology. Early adopters can take advantage of this new tool and have input in extending it to our other clients.

Details/Limitations/Known Interactions

QlikView is not integrated into Kenexa Recruiter BrassRing.

It is not hosted.

It is not a viable replacement for any of our existing reporting technology.

This solution will require QlikTech licenses to be purchased and installed for each end user.

Overview of Implementation

You can purchase the initial solution at a cost which includes three (3) end-user licenses and an annual maintenance fee. Please contact your Kenexa representative for more information.

Time Frame of Implementation

This feature is available in Release 10. The early adopter program is only available to the first ten (10) organizations who sign up through the end of August 2007.

Cost

There is an initial cost and annual maintenance fee covering license renewal and maintenance costs. Please contact your KRB representative for details.

User Experience

If your organization purchases this solution you will receive a daily file transfer (via FTP) containing a standard, yet highly interactive report with key data sets across your KRB system.

You can apply multiple filters against and drill down into your KRB data to gain deeper insight into their hiring processes.

You may choose to purchase a custom report in this interactive export delivery mechanism.

Source Capture Data Model Update

Kenexa is changing the data model to capture new information:

☐   The link between submission and source when the candidate applies to a specific job

☐   The applicant's "candidate type" at the time of submission

If your organization receives data via a feed, you can update your integration with a "source per apply" file to begin capturing this new information with this release. If your organization receives data via a feed, you can update your integration with a source-per-apply file.

Time Frame of Implementation

This feature will be completed in Release 11 and will provide access to the captured data from within Kenexa Recruiter BrassRing:

☐   The Source Yield report will report source per req.

☐   The manual connection between code and submissions will be retained.

Source Yield Report

Description

To increase the usability of the Source yield report, Kenexa made several changes to the Standard Report settings that affect configuration of the report and the content available for display in the Dashboard panel. See page 84 for information about changes to the Dashboard settings.

New Functionality or Replacement

This is replacement functionality.

Benefits

The revised Candidate source and Source yield report settings are consistent across reports. Your organization can configure the Source yield panel to display form field options if the source is pulled from a form field.

Details/Limitations/Known Interactions

If a specific source filter was used in the Source yield report and the source settings are changed, the report schedules will be voided.

If the report was pulling source data from a form field, the Dashboard panel must be re-configured to select field options.

Overview of Implementation

This feature is configured by Kenexa.

Time Frame of Implementation

This feature is available in Release 10.

Best Practice Recommendations

Cost

There is no additional cost associated with this feature.

Visible Changes

There are no Visible Changes associated with this feature.

User Experience

Configuration Changes and Report Schedules

Configuration changes for **Candidate Source** might affect report schedules. You will be notified by Kenexa if your report schedules are affected by the configuration change.

The configuration changes that trigger this schedule check are:

Changing from **Pull source from code** to **Pull source from form** or *vice versa*

Changing the code type selection for **Pull source from code**

Changing the selected field for **Pull source from form**

Note: Changing the Candidate Source does not affect existing schedules for the New Hire report.

Effect on Source Yield report schedules

If you make a configuration change to Candidate Source setting, the change affects Source Yield report schedules as follows:

Source filter criteria = All: If the selected **Source** filter criteria for the Source Yield report is set to **All**, the schedule remains valid, even if a new source configuration option is selected. The KRB user receives the standard "[Report name] schedule modified" notification. This notification instructs the schedule creator that a configuration change has been made to the report and the output of their report will reflect this new configuration, but that their schedule is still valid.

Source filter criteria □ All: If the selected **Source** filter criteria for the Source Yield report is not set to **All**, the schedule is voided. The user receives the standard "[Report name] schedule voided" notification. This notification instructs the schedule creator that a configuration change has been made to the report and that change has caused their existing schedule to become invalid.

Source Yield Panel

Description

Kenexa has changed Source Yield Dashboard settings. Previously, there was no option to configure which field data appeared in the Source Yield panel if the source was pulling from a candidate form field; the "top five" field options (in terms of volume) are displayed in the panel by default.

Through this enhancement, your organization can choose which specific field options (sources) should be displayed in your dashboard panel.

Please contact your Kenexa Recruiter BrassRing representative for more information.

New Functionality or Replacement

This is replacement functionality.

Benefits

Your organization can explicitly choose up to five (5) sources to use as display options for the Source yield panel on your KRB dashboard.

Details/Limitations/Known Interactions

None.

Overview of Implementation

This feature is configured by Kenexa.

Time Frame of Implementation

This feature is available in Release 10.

Cost

There is no additional cost associated with this feature.

Visible Changes

This feature is not visible unless configured.

User Experience

KRB users see the customized options on the Source Yield panel on the KRB dashboard.

User-configurable Talent Comparison Summary Report

Description

Kenexa Recruiter BrassRing provides users with a one-click view to compare candidates through the Talent Comparison Summary report. KRB users can use the report to compare multiple candidates across a variety of comparison fields.

In release 10, your organization can choose to configure comparison criteria to use for running Talent comparisons in KRB at two different levels:

The system-level, which has been available since Release 8

The user-level, which is a new feature available in Release 10

The report format is the same for both types of reports, but the comparison criteria are different for system-level and user-level reports.

The two options for the criteria used in this report are the following:

System-level criteria selection: Your organization can choose the criteria used system-wide for the Talent Comparison Summary report. You can choose up to 10 fields from either or both of the **Talent record** fields and **Candidate Form Fields** categories to be used every time any KRB user runs a Talent Comparison Summary report. This option is the same as current Talent Comparison Summary report functionality.

User-level criteria selection: This setting allows the individual user to choose the criteria for the Talent Comparison Summary report from a list of **Candidate record** and **Candidate Form Fields** selected by your organization. When this option is used, KRB users with appropriate privileges can create and store up to 25 sets of criteria, called Talent Comparison Profiles.

The Talent Comparison Summary Report can compare up to five (5) candidates at one time across a set of 10 system-level OR user-level comparison criteria. Additionally, KRB users using user-level criteria selection can create up to twenty-five (25) separate Talent comparison profiles.

New Terminology

Term	Definition
Master list of fields	The master list of fields is the list from which KRB users can select user-level criteria for a single Talent Comparison profile.
System-level criteria selection	A set of up to 10 fields selected from the Talent Record fields and Candidate Form Fields that are used system-wide by all users when running the Talent Comparison Summary report. This is the existing criteria for the Talent Comparison Summary report.

User-level criteria selection	A set of up to 10 fields selected from the master list of fields selected by your organization. These fields represent a broad choice of criteria available to individual KRB users for creating Talent Comparison profiles and running Talent Comparison Summary reports. KRB users may select and save sets of up to 10 user-level selection criteria in Talent Comparison profiles.
Talent Comparison profiles	Saved sets of user-selected criteria. Each profile can contain up to 10 fields. Each user can create and save up to 25 Talent Comparison profiles.

New Functionality or Replacement

This is new and replacement functionality.

Benefits

The new user-configurable Talent Comparison profiles allow divisions, departments and individuals to customize their Talent Comparison report according to their needs. Through the new User-level criteria selection for the Talent comparison summary report:

Your organization can define the master list of fields that will be available to KRB users for selection.

☐ Users define the specific fields to use in the report output that works for them.

Clients can control access to sensitive data such as the EEO. KRB applies security to the report so that users do not have access to the data within the report that they do not have elsewhere in KRB.

Your organization can continue using the System-level criteria selection if you do not wish to extend this functionality to the user level.

Details / Limitations / Known Interactions

KRB users can create and save a maximum of 25 Talent Comparison profiles using User-level criteria.

Users can select a maximum of 10 criteria for each profile.

Talent Comparison Summary reports compare a maximum of five (5) candidates.

Only "most recent" education and "most recent" experience are available as criteria.

If your organization decides to switch to the user-level criteria selection, the client-level criteria already in use are carried over to the master list of fields. Your organization can choose to change or add additional fields.

Overview of Implementation

Switching from system-level criteria to user-level criteria, or implementing the Talent Comparison Summary report for the first time, requires configuration by Kenexa.

Once enabled, this feature is available to KRB users from within Working, req, Inbox, and My candidate folders where users can access Talent Comparison profile administration.

Time Frame of Implementation

This feature is available in Release 10.

Best Practice Recommendations

Kenexa recommends that organizations allowing user-level configuration should carefully select fields they want to make available to users.

The master list of fields should include data that are comparable.

The master list of fields should not contain comparison data that might foster discrimination.

Although there is no technical limit to the number of fields that can be selected for the master list of fields, the number of fields should be kept within a reasonable amount, under 200 fields. The larger the set of fields, the longer it will take to load the criteria selection screen within KRB and create a longer list that the user must scroll through to select comparison criteria.

Cost

There is no additional cost associated with this feature.

Visible Changes

There are no Visible Changes without configuration.

User Experience: Kenexa Recruiter BrassRing

KRB users will use the Talent Comparison feature differently depending on whether your organization decides to keep the classic Talent Comparison report, which uses system-level, system-wide comparison criteria; or decides to make available the new user-configurable, profile-based Talent Comparison report. The next several sections describe both variations in detail.

System-level Criteria: Running the Talent Comparison

This section refers to the existing Talent Comparison Summary report supported by KRB prior to this release using system-level criteria.

Users with privileges to the Talent Comparison Summary Report can run the report from within Working, req, Inbox, and My candidates folders in Kenexa Recruiter BrassRing.

To run a Talent comparison on candidates:

1. Navigate to a Working, Req, Inbox, or My candidates folder containing the candidates you want to compare. **Note:** You cannot run Talent comparison reports from Search results or filtered folder results.

    Select the check box for each candidate you want to compare. You must select at least two (2) candidates. You can select a maximum of five (5) candidates. If you do not select at least 2 candidates, or you select more than 5 candidates, the Reports Module displays an error message.

    Click the Talent Comparison link in the **Actions** menu to run the Talent Comparison Summary report for the selected candidates.

    The report runs and displays its output in landscape letter format in a PDF file in a separate window.

Figure 16
: Running a Talent Comparison – Client-level criteria

Do not run reports between 12 and 3 AM Eastern time: Do not attempt to run a Talent comparison summary report between 12 AM and 3 AM ET because the reporting server is being refreshed. If you try to run the report during those hours, the Reports Module displays the following message:

> "The reporting server is currently being refreshed and is temporarily unavailable. Please attempt your report request at a later time."

Clicking **OK** closes the message window.

User-level criteria: Overview

The next several sections describe how KRB users can create and administer their own sets of Talent Comparison profiles, and how to run Talent Comparisons using these profiles. This is the new feature available in this release.

The feature must be configured by Kenexa before KRB users can use it.

When using user-level Talent Comparison profiles, the Talent Comparison link in the **Actions** menu accesses the **Talent Comparison profile administration** page.
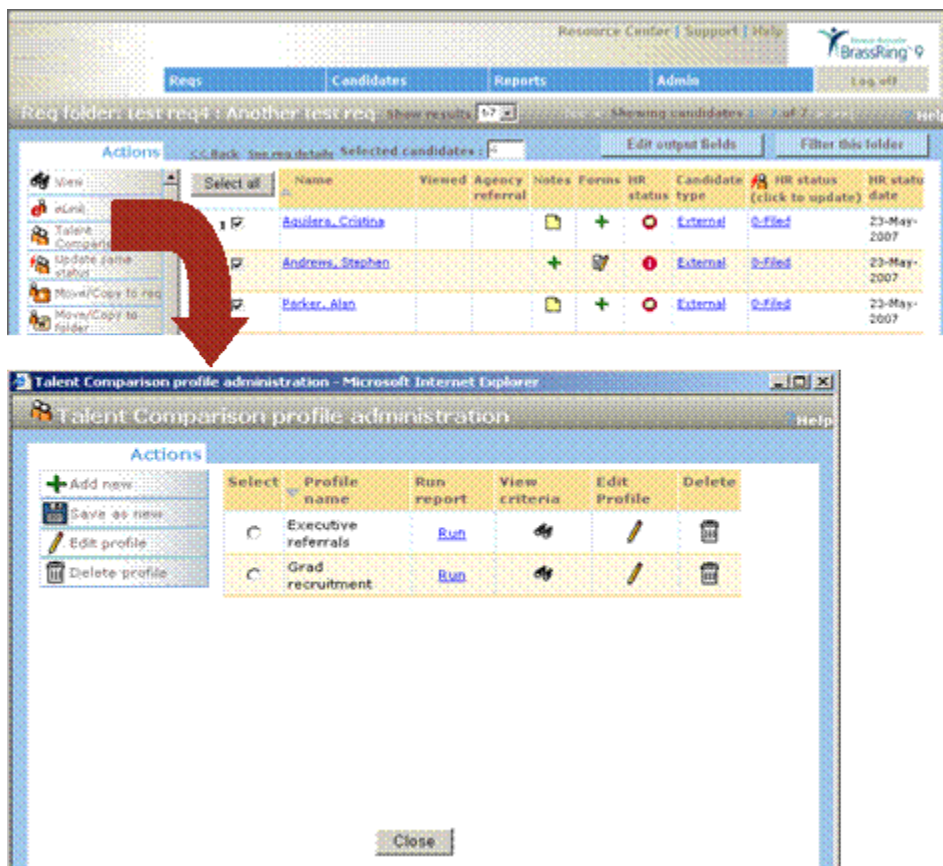

Figure 17: Accessing the Talent Comparison profile administration page

See the next several sections for more information a profile creation and administration.

Creating and Managing Talent Comparison Profiles

To access the **Talent comparison profile administration** page, click **Talent Comparison** from within a req, Working, Inbox, or My candidates folder.
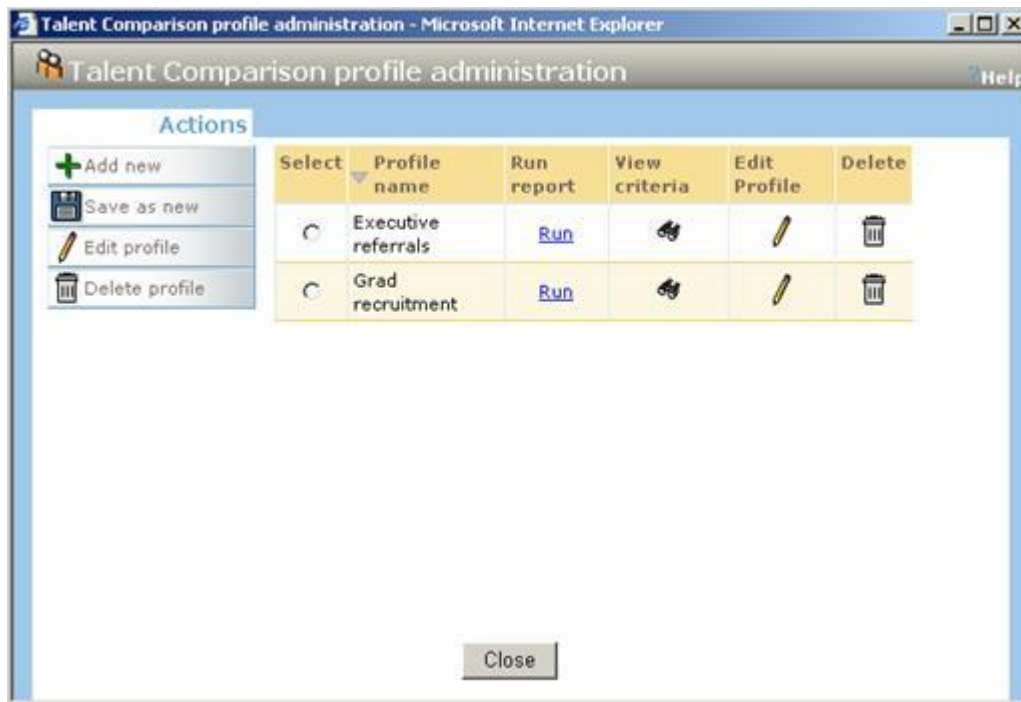

Figure 18: KRB: Talent comparison profile administration page

If you have not yet defined any profiles, the **Talent comparison profile administration** page displays the following message: "No talent comparison profiles currently exist."

As an individual user, you can create and store a maximum of 25 Talent comparison profiles.

From the Talent comparison profile administration page, you can take actions on individual profiles:

Add new (see page 52)

Save as new (see page 54)

Edit profile (see page 55)

Delete profile (see page 57)

You can also administer existing profiles from the Talent comparison profile administration grid.

Run report: Find the profile you want to use for the Talent comparison summary report and click the hyperlink to generate the report. It is displayed in a new window. (See page 58.)

View criteria: Find the profile you want to view criteria for and click the **View** icon in its row. The View talent comparison criteria window launches. (See page 56.)

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Edit profile: Find the profile you want to change and click the **Edit** icon in its row. The **Edit talent comparison profile** window launches. (See page 55.)

Delete profile: Find the profile you want to delete and click the **Delete** icon in its row. The **Delete talent comparison profile** window launches. (See page 57.)

To take an action in the grid, find the profile you want to take an action against and select its radio button.

By default, the **Profile name** column lists the names of the individual profiles sorted in ascending order (A-Z). Click the arrow beside **Profile name** to reverse the sort if desired.

Adding a Talent Comparison Profile

You can save and execute a profile at the same time.

KRB applies field-level security during profile creation. If a user does not have access to the field, it will not be available for selection, even if it is chosen as part of the master list of fields.

KRB adjusts profiles automatically if field-level privileges are changed.

KRB removes "restricted" fields automatically when users edit or save a profile as new. Users will be able to see restricted fields in the View window and in report output* until the edited /save as new profile is saved.

KRB applies field-level and run-time security to the report. Restricted data are replaced with an asterisk.

To add a new Talent Comparison profile, follow these steps:

1.   Log in to KRB.

2.   From within a req or working folder (including the Inbox), click **Talent comparison** in the **Actions** menu. The **Talent comparison profile administration** page appears.

3.   Click Add new in the Actions menu. The **Add talent comparison profile** window opens.

> **Note:** If you have already created 25 profiles, KRB displays an error message: "A maximum of 25 profiles may be created." Click **OK** to close the message window. You must delete a profile in order to create a new one by any method.
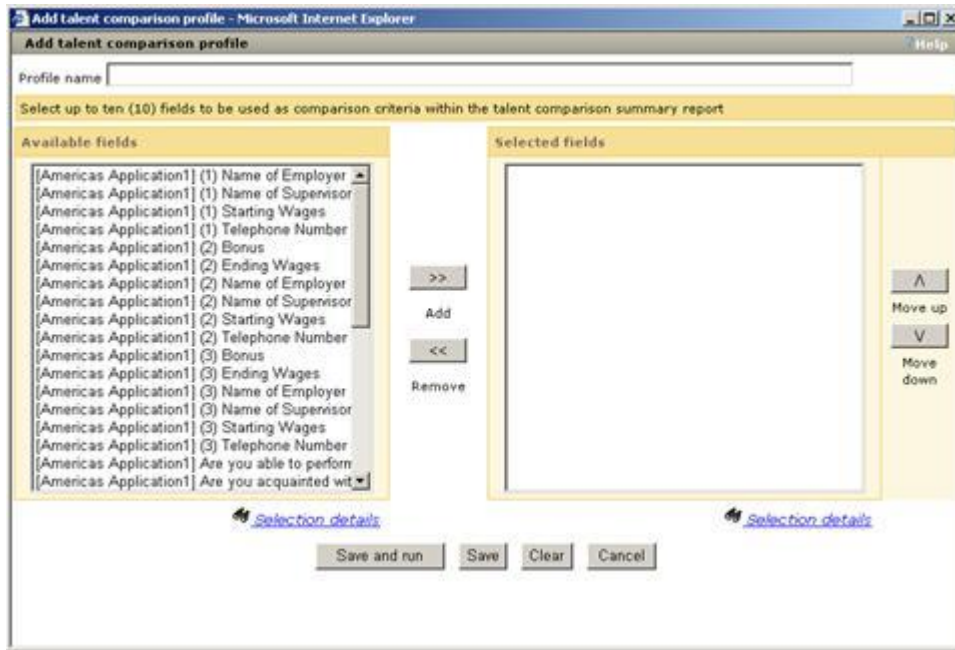
Figure 19: Add talent comparison profile window

4.   In the **Profile name** field, enter a unique name for the profile of up to 255 characters. This field is required.

5.   Select up to 10 fields in the **Available fields** list and click the **Add** >> button to move them to the **Selected fields** list. To select more than one field at once, press down the Ctrl key while selecting each field.

> If you try to select more than 10 fields, KRB displays an error message: "Maximum selections = 10". Click **OK** to close the message window.
>
> The **Available fields** list includes all of the form fields your organization selected to be available as comparison criteria that you have privileges to view.

6.   In the **Selected fields** list, use the up and down arrows to change the order of the selected fields. The order in which fields appear in the box is the order in which they will appear in the report output.

7.   Click **Save and run** to both save the profile and run the Talent comparison summary report now, using this profile. The Reports Modules displays the results in a separate window.

8.   Click **Save** to save the profile but not run it.

> In both cases, KRB performs checks to make sure you have entered all the required data (a unique profile name and at least one field is selected), and that you are not trying to create more than the maximum number of profiles allowed.
>
> Click **Clear** to empty the **Selected fields** list box and Profile name. Click **Cancel** to close the window without saving any changes.

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9.   When you save a profile successfully, the **Talent comparison profile confirmation** window opens and displays a message confirming that your profile has been saved. Click **OK** to close the confirmation window.

The Talent comparison profile administration grid lists your new profile.

Saving a Talent Comparison Profile as New

Use the **Save as new** action to create a new talent comparison profile based on a profile you have already created. You must give the new profile a unique name.

To save a Talent Comparison profile as new, follow these steps:

1.   Log in to KRB.

From within a req or working folder (including the Inbox), click **Talent comparison** in the **Actions** menu. The **Talent comparison profile administration** page appears.

Find and select the Talent comparison profile to be cloned in the grid.

Click **Save as new** in the **Actions** menu. The **Save as new talent comparison profile** window opens.

Note: If you have already created 25 profiles, KRB displays an error message: "A maximum of 25 profiles may be created." Click **OK** to close the message window. You must delete a profile in order to create a new one by any method.

In the **Profile name** field, enter a unique name for the profile of up to 255 characters. This field is required.

Select fields for the "Save as New" profile you are creating:

The **Selected** box contains the fields that have already been selected for the profile that you are copying. Decide which of these you want to remove and remove them from the Selected list.

The **Available fields** list includes all of the form fields your organization selected to be available as comparison criteria that you have privileges to view

You can have a total of 10 fields in the **Selected fields** list. To select more than one field at once, press down the Ctrl key while selecting each field. If you try to select more than 10 fields, KRB displays an error message: "Maximum selections = 10". Click **OK** to close the message window.

If your user privileges changed since the original profile was created, you may have access to either more or fewer fields than when the initial profile was created, depending on how your user privileges were changed.

In the **Selected fields** list, use the up and down arrows to change the order of the selected fields.

Click **Save and run** to both save the profile and run the Talent comparison summary report now, using this profile. The Reports Modules displays the results in a separate window.

Click **Save** to save the profile but not run it.

In both cases, KRB performs checks to make sure you have entered all the required data (a unique profile name and at least one field selected).

Click **Clear** to empty the **Selected fields** list box. Click **Cancel** to close the window without saving any changes.

When you save a profile successfully, the **Talent comparison profile confirmation** window opens and displays a message confirming that your profile has been saved. Click **OK**to close the confirmation window.

The Talent comparison profile administration grid lists your new profile.

Editing a Talent Comparison Profile

Use the **Edit profile** action to change an existing profile.

To edit a Talent Comparison profile, follow these steps:

1. Log in to KRB.

From within a req or working folder (including the Inbox), click **Talent comparison**in the **Actions** menu. The **Talent comparison profile administration** page appears.

In the grid, find and select the Talent comparison profile you want to edit.

Click **Edit profile** in the **Actions** menu. The **Edit talent comparison profile** window opens.

Change the profile name and/or the selected fields.

You can have a total of 10 fields in the **Selected fields** list. To select more than one field at once, press down the Ctrl key while selecting each field. If you try to select more than 10 fields, KRB displays an error message: "Maximum selections = 10". Click **OK** to close the message window.

If your user privileges changed since the original profile was created, you may have access to either more or fewer fields than when the initial profile was created, depending on how your user privileges were changed.

In the **Selected** fields list, use the up and down arrows to change the order of the selected fields if desired.

Click **Save and run** to both save the profile and run the Talent comparison summary report now, using this profile. The Reports Modules displays the results in a separate window.

Click **Save** to save the profile but not run it.

In both cases, KRB performs checks to make sure you have entered all the required data (a unique profile name and at least on field selected).

Click **Reset to saved** to return the **Selected fields** list box to the selections present when the window was initially launched. Click **Cancel** to close the window without saving any changes.

When you save a profile successfully, the **Talent comparison profile confirmation** window opens and displays a message confirming that your profile has been saved. Click **OK** to close the confirmation window.

The Talent comparison profile administration grid lists your changed profile. (**Note:** If you did not change the profile's name, the changes you made will not be obvious within the grid.) The Reports Modules displays a confirmation message when you have saved a new or edited profile successfully.

Viewing a Talent Comparison Profile

To view a Talent comparison profile, click the View icon   in the row for the profile you want to view.

To view the details of a talent comparison profile, follow these steps:

1.   Log in to KRB.

From within a req or working folder (including the Inbox), click **Talent comparison** in the **Actions** menu. The **Talent comparison profile administration** page appears.

Find and select the Talent comparison profile you want to view in the grid.

Click **View profile** in the **Actions** menu. The **View talent comparison profile** window opens. See the table below for more information about each field.

When you have finished viewing the profile information, click **Close**.

Table 12: View talent comparison profile fields

Field	Description
Profile added on	The date the profile was created originally. The date format is DD-MMM-YYYY.
Profile updated on	The date on which the profile was last updated. The date format is DD-MMM-YYYY.
Profile name	The name of the profile.
Fields selected for this profile	The list of fields selected for the profile. **Note:** The Reports Modules do not perform security checks for the **View** action. As a result, you can see all fields currently associated with the profile being viewed, including fields for which you may no longer have user privileges when adding, saving as new or editing a profile.

Deleting a Talent Comparison Profile

Use the **Delete profile** action to permanently delete a talent comparison profile.

To delete a talent comparison profile, follow these steps:

1. Log in to KRB.

2. From within a req or working folder (including the Inbox), click **Talent comparison** in the **Actions** menu. The **Talent comparison profile administration** page appears.

3. In the grid, find and select the Talent comparison profile you want to delete.

4. Click the Delete icon for the profile you want to delete or click **Delete profile** in the **Actions** menu. The **Delete talent comparison profile** window opens.

5. Click **OK** to confirm that you want to delete the profile. Click **Cancel** to close the window without making any changes.

6. After you click **OK**, the Reports Module displays a message confirming the deletion of the talent comparison profile. The profile is removed from the Talent comparison profile administration grid.

User-level Report Output

The contents of the comparison criteria column within the Talent comparison summary report depend on whether your organization is using system-level or user-level talent comparison criteria selection.

If **System-level criteria selection** option is used, the comparison criteria in the report apply to all system users for the client.

If **User-level criteria selection** option is used, the comparison criteria in the report are pulled from selected talent comparison profile being run.

Figure 21

: Talent Comparison Summary report output

The output for Talent Comparison Summary reports that use user-level criteria selection is customized based on individual user selections within KRB. Individual users can select from the total number of fields made available by your organization, which is constrained only by the total number of fields of a valid type that exist on the Talent Record and on custom candidate forms. Individual users can include up to 10 fields in each profile, and up to 25 profiles.

Running the report within a Req folder: If KRB users run the Talent comparison report from within a requisition folder and comparison criteria fields are pulled from a candidate per req-type form, the responses returned correlate to each specific requisition. The most recent field information is used only if a correlation to a specific requisition cannot be made or if there are multiple instance of the form completed for that specific requisition.

Running the report within a Working folder: If KRB users run the Talent comparison report within a working folder, the report output displays the most recent responses to each of the comparison criteria, even if most recent responses were left blank.

Example #1: Assume that the "Salary Preference" field is pulled from the "Application" form. The application form is configured to be a multiple-per-candidate per req-type form. When the talent comparison report is run within Req.#123BR, the response captured for each candidate for the "Salary Preference" field on the form specific to Req.#123BR should be displayed. If the comparison is then run in Req.#456BR, the responses for each candidate specific to the Req.#456BR form display. If multiple correlating forms exist for a specific requisition, then most recent form completed for that requisition is used.

Example 2: Assume that the "Are you willing to relocate?" field is pulled from the "Interview" form. The interview form is configured as a single-per-candidate per req-type form. For Req.#123BR, the interview form has been completed for all candidates. Accordingly, when the comparison is run, the responses displayed are specific to the form responses for Req.#123BR.

However, in Req.#456BR, not all of the candidates have an interview form completed. For the candidates that do have an interview form completed for Req.#456BR, the correlating responses for Req.#456BR appear. For any remaining candidates where a correlating form cannot be found, the response for the most recently completed interview form appears.

The security footnote: The following security footnote appears at the bottom of the generated report, whether or not there are any security restrictions applied within the report output: "*Based on data security privileges, this field is not available for output."

Date generated: This field displays the date the Talent Comparison Summary report was generated by the user in the following format: dd-mmm-yyyy hh:mm:dd AM/PM.

Security

KRB enforces security during profile creation and in some circumstances during report execution, to accommodate user-level selection of comparison criteria. Users are able to select only those fields for which they have privileges in KRB. KRB enforces security at the report level, data level, form level and field level.

Report-level Security

Access to the Talent Comparison Summary Report is controlled through a user type privilege.

Data-level Security

Before the Talent Comparison Summary report results are compiled for display, KRB checks the individual user's security privileges for the data contained within the report.

Form-level Security

KRB checks the user's access privileges at the form level.

If a user is associated with a User Type that does not have "output" privileges for a specific form, the responses for any configured fields from that form display as an asterisk (*) in the Talent Comparison Summary Report output.

If a user is associated with a User Type that does have "output" privileges for a specific form, KRB moves to field-level privilege checking.

Field-level Security

KRB imposes field-level security when running the Talent comparison summary report. It substitutes an asterisk (*) for field data if the user does not have privileges to view a specific field that has been used as a comparison criterion.

After ascertaining that a user has privileges to view a form, KRB checks the user's access privileges at the field level.

If a user is associated with a User type for which a field is not hidden, then that field's responses are visible in the Talent Comparison Summary Report output.

If a user is associated with a User Type that has restricted view access for a particular field, that field will be hidden on the form for all members of that User Type. The responses for this hidden field are replaced with an asterisk (*) in the Talent Comparison Summary output.

Changed field-level privileges: When a user's existing field level privileges are changed, KRB runs a security check at the report execution-level. For example, the user may have set up a profile using a field called "Salary requirements" as a comparison criterion. Subsequently, the user's data access privileges are modified and the user can no longer view the "Salary requirements" field in KRB. In this case, while "Salary requirements" still exist as a selected comparison criterion in the report, the user cannot see the data for that field because his or her user privileges have been changed.

Enforcing security during report execution: The Reports Module continues to check field-level security during report execution. The user can execute the report using his or her existing profile (which may contain newly hidden fields) but when the report is generated, asterisks (*) are substituted for any data for restricted fields.

Saving profiles with restricted fields: If the user performs a **Save as new** or attempts to edit a profile containing the restricted fields, any fields to which the user no longer has access would automatically be removed from the **Available** and **Selected** boxes and are no longer associated with that profile once the user clicks **Save**.

Make Custom Req Fields Non-editable During Req Creation

Description

When KRB users create reqs with custom req fields, those fields are editable by default for the "create a req" process. As of Release 10, clients can choose to make custom req fields uneditable (that is, read-only) when *creating* a req by several different methods.

Currently your organization can choose to make a custom req fields not editable for certain user only in "edit mode."

With this release, you can extend this setting to "add req" mode, meaning that the selected user types can not edit the custom field under any circumstances.

See the Kenexa Workbench 10 Release Notes for information about this setting.

This feature applies to the following req creation methods: **Save as new, eLink blank req, External req URL**, and creating a req from an e-mail request.

It does not apply to reqs coming into the system through Req import or Integration.

New Functionality or Replacement

This is new functionality.

Benefits

This feature permits your organization to exert more control over when and where users can edit specific requisition fields during req creation using a variety of methods.

Limitations / Known Interactions

These settings do not affect Req Field associations if this feature is used by your organization.

Time Frame of Implementation

This feature is available in Release 10.

Overview of Implementation

This feature can be activated by a certified Workbench user or by Kenexa.

Cost

There is no additional cost for this feature.

Visible Changes

There are no Visible Changes without configuration.

User Experience

In KRB, user types with the non-editable privilege turned on see labels for non-editable custom req fields; non-editable text area fields have active scrollbars.

These settings do not affect Req Field associations.

Security Enhancements

Administer User Type Changes

Description

Kenexa provides more selective control over users who have "Add user" and "Edit user" privileges in Kenexa Recruiter BrassRing™ (KRB). Your organization can now choose which user types appear in the user type field on the user profile for specified users. You can additionally restrict the ability for a user to change their own user type.

This new feature has different implications for already existing user types (created prior to this release) and newly created user types (created after this release). There will be no change to existing user types at the time of this release. New user types created after the release with the "Add user" and "Edit user" privileges in KRB will be restricted automatically to adding/editing the user type field for users of their own user type.

See the Kenexa Workbench 10 Release Notes for details about how to configure these privileges.

New Functionality or Replacement

This is new functionality.

Benefits

Prior to this release, KRB users with the ability to add and/or edit other users, could also edit the user type field. This allowed users to add/edit users with privileges that exceed their own, causing a potential security risk. This feature restricts users to these functions more selectively

Details/Limitations/Known Interactions

If a user type is added after this feature is available, the new user type will be defaulted to only have access to update the user type field for users of the same user type. You may want to decide to selectively expand the access of newly created user types to additional user types.

Existing user types are not affected. Those user types retain their current access to add and edit all users' user types in KRB. Your organization may decide to take advantage of this new feature for your existing user types and grant edit user type field access more selectively.

The user privileges "Users - Add" and "Users – Edit" still determine whether a KRB user has the privilege to add or edit a user when working in KRB. The new configuration settings do not interfere with these existing privileges. This new feature does not determine which user types can be edited, but rather it only restricts the user type field for those users.

In KRB, the **User type** field on the **Add user/Edit user** pages is populated from the selections made by your organization for that user type to update. As a result, the KRB user will be able to see only the user types that s/he has the Add user/Edit user privileges for in the **User type** selection field on the **Add user** and **Edit user** pages in KRB.

Overview of Implementation

This feature can be configured by a certified Workbench user or by Kenexa.

For each user type you can decide:

Which user types will be available for that user in the User type field of the add/edit user profile page. If a user does not have access to a specific user type when editing a profile of a user belonging to that type, then the User type field will be visible but disabled.

If individuals belonging to the user type will be allowed to edit their own user type.

Time Frame of Implementation

This feature is available with Release 10.

Cost

There is not additional cost for this feature.

Visible Changes

None.

KRB and Agency Manager Cookies are Marked as Secure

Kenexa Recruiter BrassRing and Agency Manager cookies are marked as secure to meet TruSecure requirements.

When other systems use an SSL connection to access Kenexa Recruiter BrassRing (KRB) and Agency Manager, KRB generates cookies, marks them as secure and sends them back over a secure connection to the original user's browser.

In addition, to prevent the transmission of sensitive data in plain text (including the cookies themselves), KRB users cannot switch from an SSL connection to a non-SSL connection after logging in.

Privacy Policy Link on all Pages in Kenexa Recruiter BrassRing

With Release 10, Kenexa Recruiter BrassRing displays a link to Kenexa's privacy policy in the bottom right corner of all pages, in accordance with TRUSTe's enhanced standards.

Site Activity Report Enhancements

Feature Overview

For Release 11, Kenexa added significant functionality to the Site activity standard report.

Clients can report on site activity at the Global Talent Gateway (GTG), Talent Gateway (TG), and individual requisition level. Using the new "Submission" output column, clients can determine "drop-off" rates between all of the various site pages, starting with search results page and ending with the actual submission into KRB.

To support this new functionality, Kenexa:

  Added three (3) additional filters to the filter page
  Updated the current Site activity report logic to report requisition-specific data
  Updated sorting/grouping options for report output: Summary, Graph, and Req-specific
  Updated the PDF and Excel Sortable formats for report output
  Added the Submissions column to report output

  Added the Total row to tally GTG output by relevant categories
  Revised the description of the report on the Standard reports menu page.

Effect on Scheduled Reports

The changes to the Site activity report do not affect existing report schedules.

Note: The filter criteria selected for a scheduled report cannot be modified once the report is scheduled. Report schedulers should cancel the existing schedule and create a new to take advantage of the new filter options.

When the Site activity enhancements are put into production, all users with existing report schedules will automatically see the new report output within the scheduled report email results.

Because the changes being made to the report affect the report output and not the filter criteria used to generate the report, users who schedule reports do not have to void the existing schedules. Users might decide to create new report schedules to take advantage of the three (3) new filter options.

Note: To alert users to the report changes, the following message is being added on the top of Site activity scheduled report email: "Please note: Enhancements have been made to the Site activity report output. These enhancements have been automatically applied to your scheduled report results."

Benefits

Clients have more options, more information, and can report with more specificity on site activity. Report output is more useful and easier to interpret.

Visible Changes

There are visible changes associated with this project:

¡ The Standard Reports Menu page has an updated description of the revised Site activity report: "The

report returns activity statistics for the selected Gateway site(s), or for specific requisitions posted to Gateways."

¡ The Site activity report has new filters on the report filters page.

¡ The Site activity report has a new Req ID sorting/grouping option.

¡ The report output captures submissions for GTGs, TGs, AMs, and Req IDs.

¡ The Site activity report output has several changes to reflect the added functionality and to present the

report data in a more informative manner.

Overview of Implementation

The new report format is automatically available in Release 10, Build 5 on November 30, 2007.

Details / Limitations / Special Instructions

Please see the detailed description in these notes.

Availability

This feature is available in R10.5 as of November 30, 2007.

Costs

There is no additional cost for this feature.

Site Activity Report

The Site activity standard report returns activity statistics for the selected Gateways, Talent Gateways, Agency Managers and for specific requisitions posted to Gateways.

Uses

Use this report to:

  Determine the effectiveness of each Global Talent Gateway (GTG), Talent Gateway (TG), and/or

Agency Manager (AM).

Examine web traffic to each GTG, TG, and AM.

Analyze how many job seekers you are capturing and building relationships with over time based

upon whether they are returning to their Talent Profile.

Report on site activity at a per-requisition level using the Req-specific sorting/grouping option.
Target results to specific sites or requisitions for which you want data using the report filters: GTG

name, Site name, and/or Req ID.

Determine drop-off rates between all the site pages, ending with the actual submission into KRB

using the Submission output column.

Report Filters

[New in Release 11] Since the revised report contains much more detailed information than the previous version, several restrictions on date range filters have been put in place to ensure that you can run your Site activity reports without timing out. These restrictions affect the Select months, Calendar year to date, and Previous year (all) date filters.

Table 1: Site Activity Report Filters

Filter	Description
Select date range	Select months Select up to six (6) months at a time for a report. To select multiple months, hold down [Ctrl]. Note: The totals are combined rather than separated by month. [New in R10.5 (December, 2007]: You can select a maximum of 6 months for one report. If you try to select more than 6 months, an error message pops up.
	Month to date
	Previous calendar month
	Calendar quarter to date
	Previous quarter (all)
	Calendar year to date

	[New in R10.5] If you select Calendar year to date as a date filter, you must select one of the filters GTG name, Site name, or Req ID; otherwise an error message pops up. If you select the Req ID filter, you must select one or more specific Req IDs, but not "All." When you select this date filter, you are retrieving site statistics for the year for a specific Global Talent Gateway (GTG name), a specific Talent Gateway (Site name), or for a specific requisition(s) (Req ID).
	Previous year (all) [New in R10.5] If you select Previous year (all) as a date filter, you must select one of the filters GTG name, Site name, or Req ID; otherwise an error message pops up. If you select the Req ID filter, you must select one or more specific Req IDs, but not "All." When you select this date filter, you are retrieving site statistics for the previous year for a specific Global Talent Gateway (GTG), a specific Talent Gateway (Site name), or for a specific requisition(s) (Req ID).

Req ID	[New in R10.5]
	
	This filter pulls site activity data for a specific req or group of reqs. The default selection is "All."
	Note: You cannot leave the Req ID filter set to All if you select either of the date filters Calendar year to date or Previous year (all).
	The ReqTrigger client setting determines how this filter is derived.
	  If the ReqTrigger setting is Auto or No, the report pulls and
	
	displays requisition data using the KRB AutoReqID.
	
	  If the ReqTrigger setting is Optional, the report pulls and
	
	displays requisition data using the client's optional req ID.
	The label for this field is your organization's custom label for AutoReqID or optional req ID in the locale specific to your user locale (if a translation is available), or the base locale of your organization.
	
	Security Applied:
	Org Group security Only requisition IDs associated with the user's Org Group(s) [and, consequently, Req templates associated with the Org Group(s)] display in the list.
	For example, a user belongs to Org Group A and Org Group A has access to Req template A. That user is able to see requisitions associated with Org Group A and Req template A listed in the multi-

	select list for Req ID.
	My / All Reqs. Security Only requisition IDs to which the user has viewing privileges display in the list.
	For example, a user, through his user type privileges, has access to view "My requisitions" that are in the Open status. That user is able to see open requisitions for which he or she is the hiring manager, recruiter, or req team member listed in the multi-select list for Req ID.
	This filter is hidden for users who do not have viewing privileges for any requisitions. For those users, report output returns generic site activity and no activity related to specific requisitions.
	Field level security: Not applied.
	Candidate type security: Not applied.
	Interaction of Req ID and GTG name or Site name:
	Req ID works in conjunction with GTG name and Site name filters:
	If you select GTG name or Site name in addition to Req ID, and
	the selected Req ID has never been posted to the selected GTG or TG, no results are returned in the report output.
	If you select one or more Req IDs and make no selection for GTG
	name or Site name, the reports activity data for the req ID selections across all sites to which it was posted.
	Summary View: When you are running a Summary view of the report and you use the Req ID filter, the view returns generic (meaning all, not req-specific) site activity for all of the sites to which the req is posted unless you have selected one or more specific site in other filters.
	Req-specific View: When you are running a "Req-specific" view of the report, the view returns only the activity specific to the selected requisition(s).
GTG name	[New in R10.5]
	This filter is available when your organization has configured at least one Global Talent Gateway.
	Use this filter to run reports for a specific Global Talent Gateway and its members. The default selection is All.
	When you make a selection for this filter, the report returns data only for the selected site(s).
	Interaction with date filter: If you use either of the date filters Calendar year to date or Previous year (all), you can select only one GTG in the list of GTG sites and you cannot select All. If you select more than one GTG or All, an error message pops up when you click Generate report now or Schedule report.

Site name	[New in R10.5]
	Use this filter to run reports for a specific Talent Gateway or Agency Manager or set of Gateways and Agency Managers. The default selection is All .
	When you make a selection for this filter, the report returns data only for the selected site(s).
	Interaction with date filters: If you use either of the date filters Calendar year to date or Previous year (all), you can select only one TG in the list of TG sites and you cannot select All. If you select more than one TG or All, an error message pops up when you click Generate report now or Schedule report.
	Interaction with GTG name filter: If you use the Site name filter in conjunction with the GTG name filter, it is assumed that the Site name selected for the Site name filter is a member of the GTG selected for the GTG name filter. If it is not a member, no results are returned.
	Examples
	Acme GTG has 2 members: Acme External TG and Acme Internal TG.
	Example 1 - If you select:
	Acme GTG for GTG name filter
	College TG for the Site name filter
	You get these results:
	The report returns no results because College TG does not belong to the Acme GTG.
	Example 2 - If you select:
	Acme GTG for GTG name filter
	Acme External TG for the Site name filter
	You get these results:
	The report returns data for Acme External TG only.
	Example 3 - If you select:
	nothing for GTG name filter
	Acme External TG and College TG for the Site name filter
	You get these results:
	The report returns data associated with the two selected sites. However, if those sites belong to a GTG, the GTG header is displayed and the associated site data displays under that header.

Figure 1: Standard activity report Report filters

Site Activity Report Output Format Changes

[New in R10.5] The report output types have changed to reflect the additional filter selections and
sorting/grouping options available in the report. See the table below for more information.

Table 2: Information included in report by output type

Output Type	Information Included
.pdf, .html, .tif	The first page lists filter criteria selected for the report and a set of definitions for each column to help users determine how the report data are calculated.
Excel Sortable and Formatted Excel (.xls)	The first tab lists filter criteria selected for the report and a set of definitions for each column to help users determine how the report data are calculated.
.xml and .csv	These formats do not list filter criteria selected for the report.

Sorting/Grouping Options

After you select the report filters and generate the report, you have a choice of three sorting/grouping
options (or "views") for viewing the report data: Summary, Graph, and Req-specific.

Summary

The Summary grouping is applied by default after you click Generate report now.

Client has GTG?	How does the report display the information?
No	It groups the data by Site name. The Submissions column indicates number of submissions per site. The Total row does not display.
Yes	It groups the data by GTG name, (Global Talent Gateway name), and then by member Site name. The Submissions column indicates number of submissions per site. The Total row indicates number of submissions per GTG. (For sites not associated with a GTG, the report does not return a "total" row.)

Graph

Note: The Graph sorting/grouping option, or view, does not return GTG data or req-specific data.

The Graph Sorting/Grouping Option breaks out activity for specific sites.

Vertical axis | : Displays individual activities

Horizontal axis : Displays the counts for each activity, broken down by site

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This option generates a graph displaying site-specific data for the following activities:

Jobs e-mailed to friends

Search agent created

Returned profiles

Submissions

Apply page hits
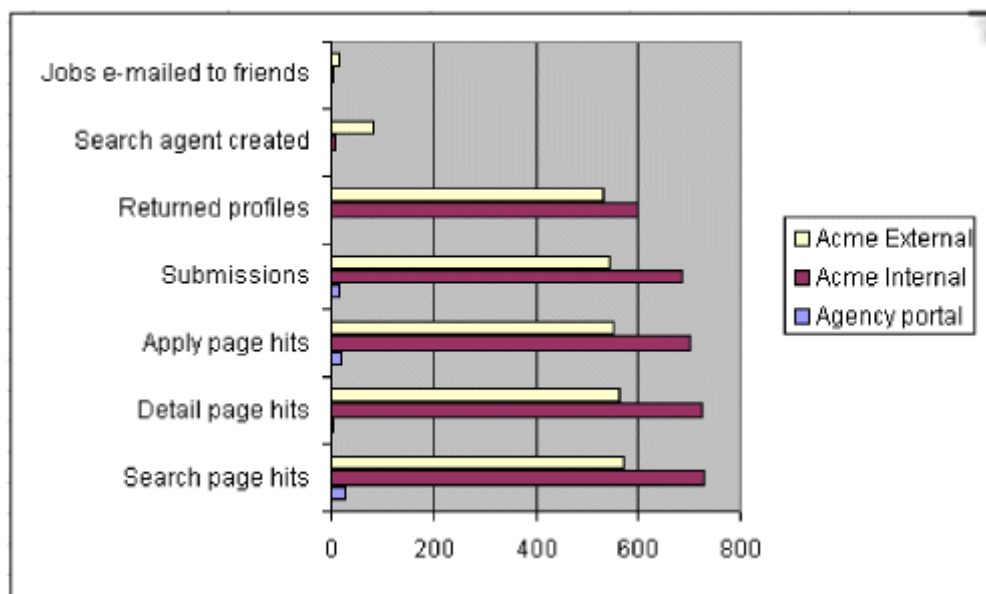
Detail page hits

Search page hits

Figure 2: Graph Sorting/Grouping Option, Site activity report

Req-Specific

The Req-specific sorting/grouping option returns req-specific data in the following categories: Search page hits, Detail page hits, Apply page hits, and Submissions.

The req-specific sorting/grouping option groups data by Req ID, and then by GTG (when GTGs are implemented).
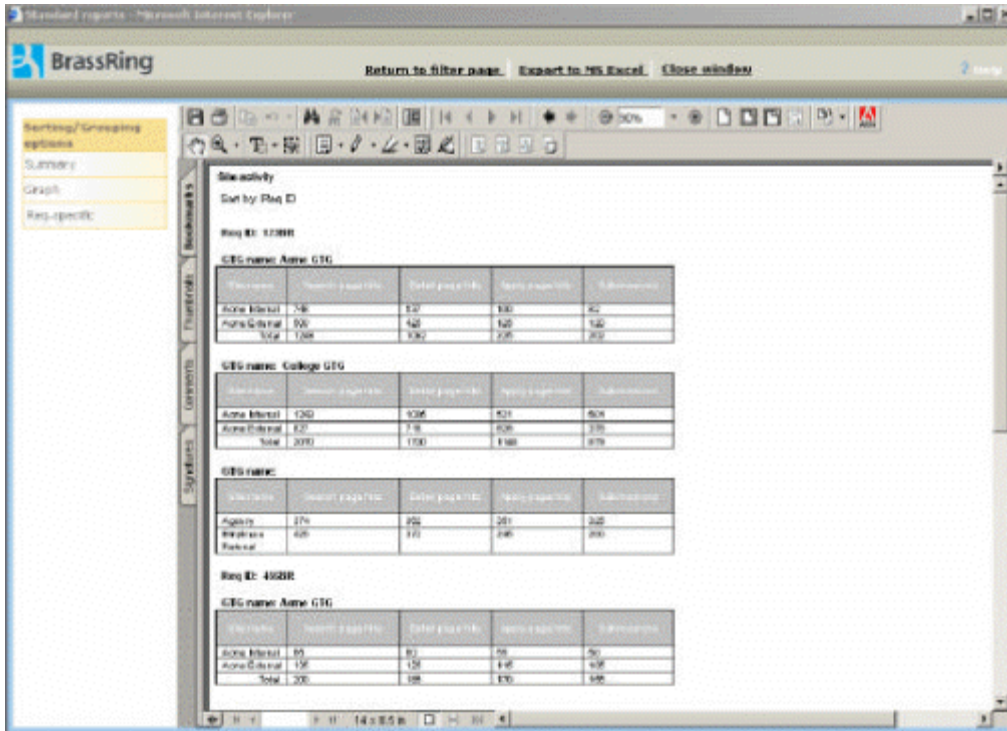
Figure 3: Req-specific Sorting/Grouping Option, Site activity report

Report Output

The report output choices on the filter page are:

  Acrobat (.pdf)

  Excel Sortable (.xls)

  Formatted Excel (.xls)

  Extensible markup (.xml)

  Image file (.gif)

  Office Web (.mhtml)

  Tab delimited (.csv)

Changes to PDF Output Format

[New in R10.5] The first page of the Site activity report in PDF format has a report header, new and changed filters, and new column definitions. See the table below for more information about each filter displayed on the first page of the PDF version of the report.

The filters are Date range [changes in R10.5], Site language [no change], GTG name [new in R10.5], Site name [new in R10.5], and Req ID [new in R10.5].

Table 3: Filter criteria at top of report results

Field	Description
Date range	This section lists the date filter criteria selected by the user; for example, "Date range: Month to date."
Site language	This section lists the site language filter criteria selected by the user; for example, "Site language: All."
GTG name	This section lists the GTG name filter criteria selected by the user; for example, "GTG name: Acme GTG." If, because of your organization has not implemented GTGs, you cannot see the GTG name filter on the filter page, this line is not returned in the report results.
Site name	This section lists the site name filter criteria selected by the user; for example, "Site name: Agency portal."
Req ID	This section lists the site name filter criteria selected by the user; for example: "Req ID: 123BR." This section displays the client's custom label for either the AutoReqID or optional req ID in the language of your user locale. If no translated value is available for a specific locale, the label is displayed in the language of your organization's base locale.

Column Definitions

[New in R10.5] The first page of the Site activity report describes each column returned in the report, which data are included in each column, and how the calculations are done for each column.
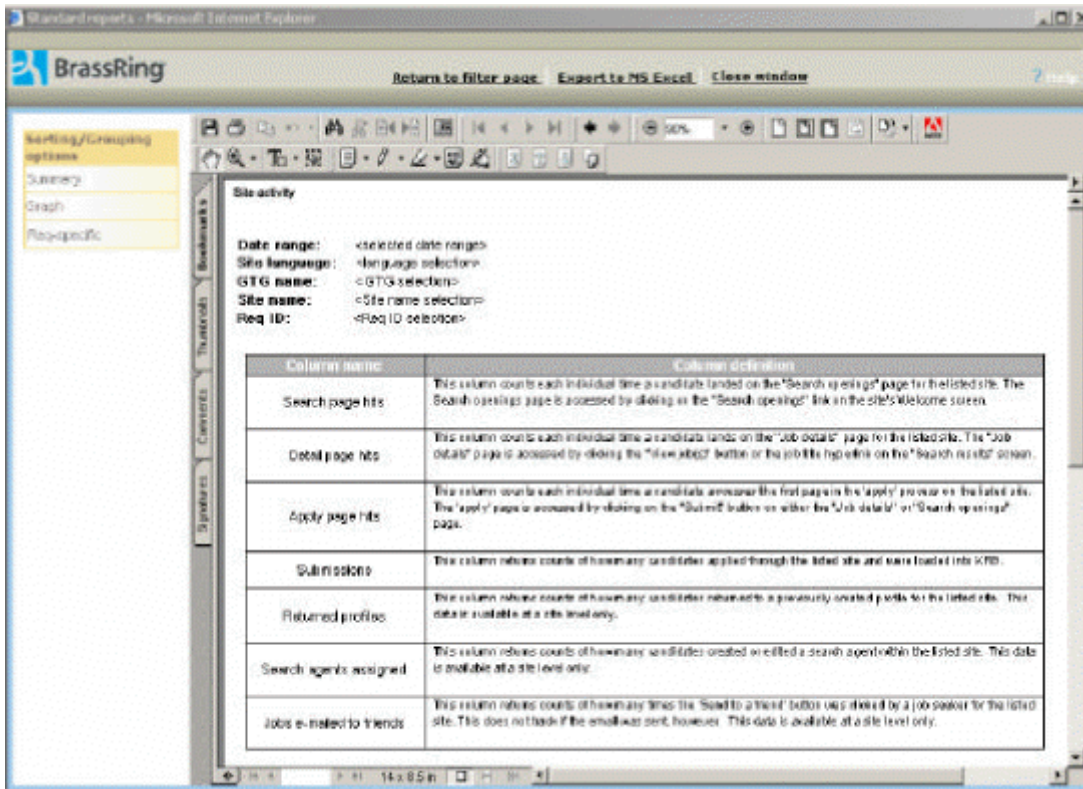
Table 4: Column Definitions describe what the report data mean

Column name	Column definition
Search page hits	This column counts each individual time a candidate landed on the Search openings page for the listed site. The Search openings page is accessed by clicking on the Search openings link on the site's Welcome screen.
Detail page hits	This column counts each individual time a candidate lands on the Job details page for the listed site. The Job details page is accessed by clicking the View job(s) button or the job title hyperlink on the Search results screen.
Apply page hits	This column counts each individual time a candidate accesses the first page in the apply process on the listed site. The apply page is accessed by clicking on the Submit button on either the Job details or Search openings page.
Submissions	This column returns counts of how many candidates applied through the listed site and were loaded into KRB.

Returned profiles	This column returns counts of how many candidates returned to a previously created profile for the listed site. This data is available at a site level only.

Search agents created	This column returns counts of how many candidates created or edited a search agent within the listed site. This data is available at a site level only.
Jobs e-mailed to friends	This column returns counts of how many times the Send to a friend button was clicked by a job seeker for the listed site. This does not track if the email was sent, however. This data is available at a site level only.

PDF Output: No GTGs / Summary View

The Summary view of the Site activity report returns data for individual sites in the following categories:

Search page hits

Detail page hits

Apply page hits

Submissions

Returned profiles

Search agents created

Jobs e-mailed to friends

The Submissions column displays the number of submissions per site.

Table 5: Site Activity Report, No GTGs, PDF Output, Summary View

Field	Description
Report header [new in R10.5]	Site activity Sort by: [Site name]
Report contents	The report returns all of the site names which had activity during the selected date filter range displayed in an output grid.
Submissions [New in R10.5]	The Submissions column returns the actual number of KRB submissions during the specified filter date range for the listed site, including req-specific or jobless apply submissions. If a candidate has submitted to multiple requisitions within a single visit to a site, this is captured as a single submission in the summary section of the report. Each individual submission per req is counted in the req detail section of the

	report.
	To calculate the drop-off rate for each individual site, you can compare data in
	the "hit" columns with the data in the Submissions column.
	Important! This means that the submissions total on the summary and detail portions of the report may not match.

PDF Output: No GTGs / Req-Specific View

[New in R10.5] The Req-specific view of the Site activity report returns data for each Req ID in the following categories:

Site name

Search page hits

Detail page hits

Apply page hits

Submissions

Figure 4: Site Activity Report, No GTGs, PDF Output, Req-Specific View

Table 6: Site Activity Report, No GTGs, PDF Output, Req-Specific View

Field	Description
Report header	Site activity Sort by: [Req ID] The [Req ID] displays your organization's custom label for either AutoReqID or optional req ID in the language of your user locale. If no translated value is available for a specific locale, the Req ID label is displayed in the language of the base locale for your organization.

Report contents	The Req-specific sorting/grouping option returns an output grid listing the site names with activity for the selected Req ID(s) during the selected date filter range.
Footnote	If the report contains no req-specific information (for example, all submissions are 'jobless'), the following footnote displays on the Details page for the Req-specific report: "No req specific information available for the selected criteria."

PDF Output: GTGs Implemented / Summary View

[New in R10.5] The Summary view of the Site activity report for clients who have GTGs implemented returns data for GTGs and individual sites within GTGs in the following categories:

For each [GTG name: Site name]:

Site name

Search page hits

Detail page hits

Apply page hits

Submissions

Returned profiles

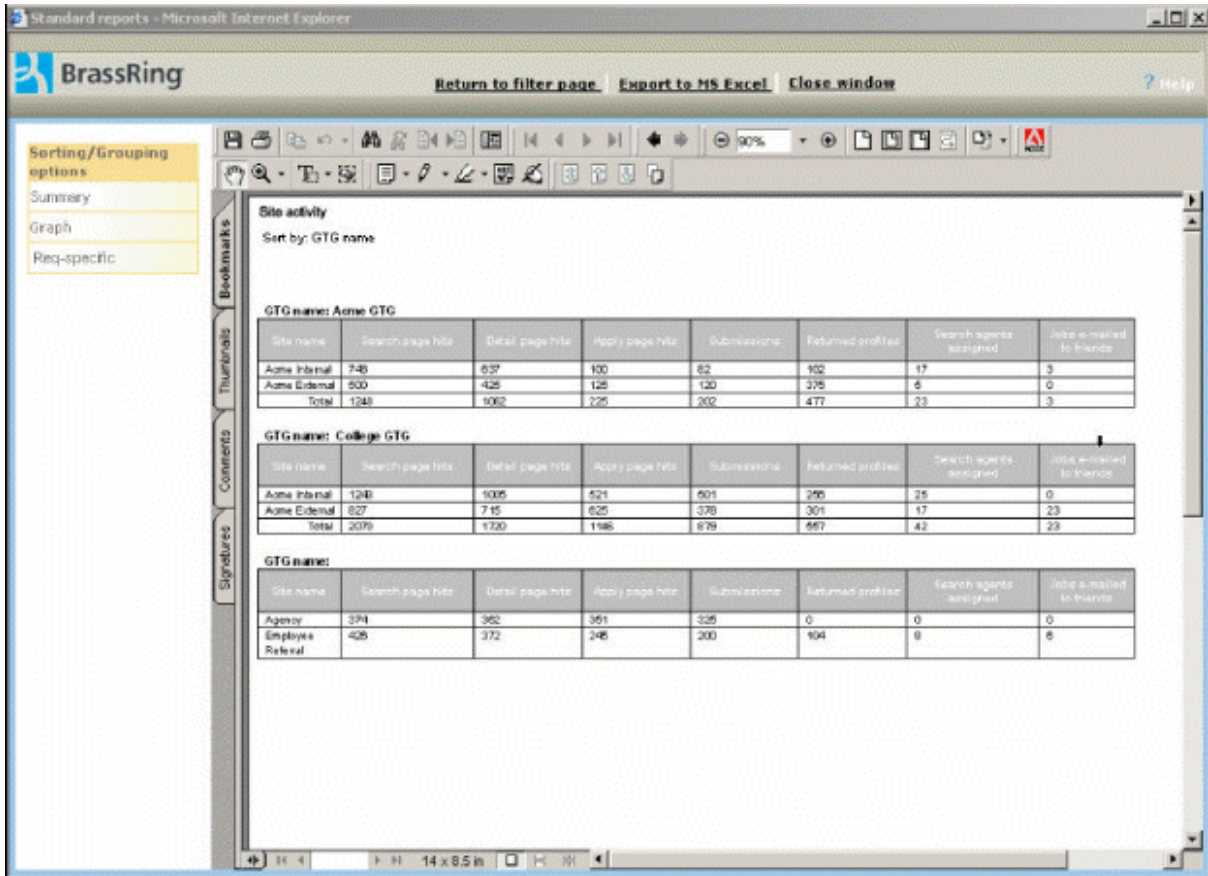Search agents created

Jobs e-mailed to friends

Figure 5: Site Activity Report, GTGs, PDF Output, Summary View

Table 7: Site Activity Report, GTGs, PDF Output, Summary View

Field	Description
Report header	Site activity Sort by: [GTG name]

Report content:	When is a site counted under a GTG?
GTG Title and output grid	A site is counted under a GTG if it meets the following two conditions: 1. At the time a candidate action is tracked, the site is a member of a GTG. AND 2. At the time the report is run the site is still a member of that GTG. Note: Sites that are not members of GTGs, including Agency Managers, are listed in the "GTG name: <blank>" section of the report. See below for more information.
Submissions	The Submissions column returns the actual number of KRB submissions during the specified filter date range for the listed site, including req-

[new in R10.5]	specific or jobless apply submissions. If a candidate submitted to multiple requisitions within a single visit to a site, this is captured as a single submission in the summary section of the report. Each individual submission per req is counted in the req detail section of the report. To calculate the drop-off rate for each individual site, you can compare data in the "hit" columns with the data in the Submissions column. Important! This means that the submissions total on the summary and detail portions of the report may not match.
Total row [new in R10.5; only when GTG is enabled]	The data are summed for each column in this row.
GTG name: <blank> [new in R10.5]	This section captures data for sites with activity in the selected date filter range that do not belong to a GTG. This category includes Agency Manager sites. The data in this section are not summed because each site captured in this part of the report is in its own category.

[new in R10.5] PDF Output: GTGs Implemented / Req-Specific View

Users with appropriate privileges can use this sorting/grouping option to see site activity broken down by specific requisition.

Note: The Req ID sorting/grouping option appears only if the user has privileges to view the Req ID filter on the report's filter page.

The Req-specific view of the Site activity report for clients who have GTGs implemented returns data for GTGs and individual sites within GTGs in the following categories:

Sorted by Req ID / [GTG name: Site name]:

 Site name

 Search page hits

 Detail page hits

Apply page hits

Submissions

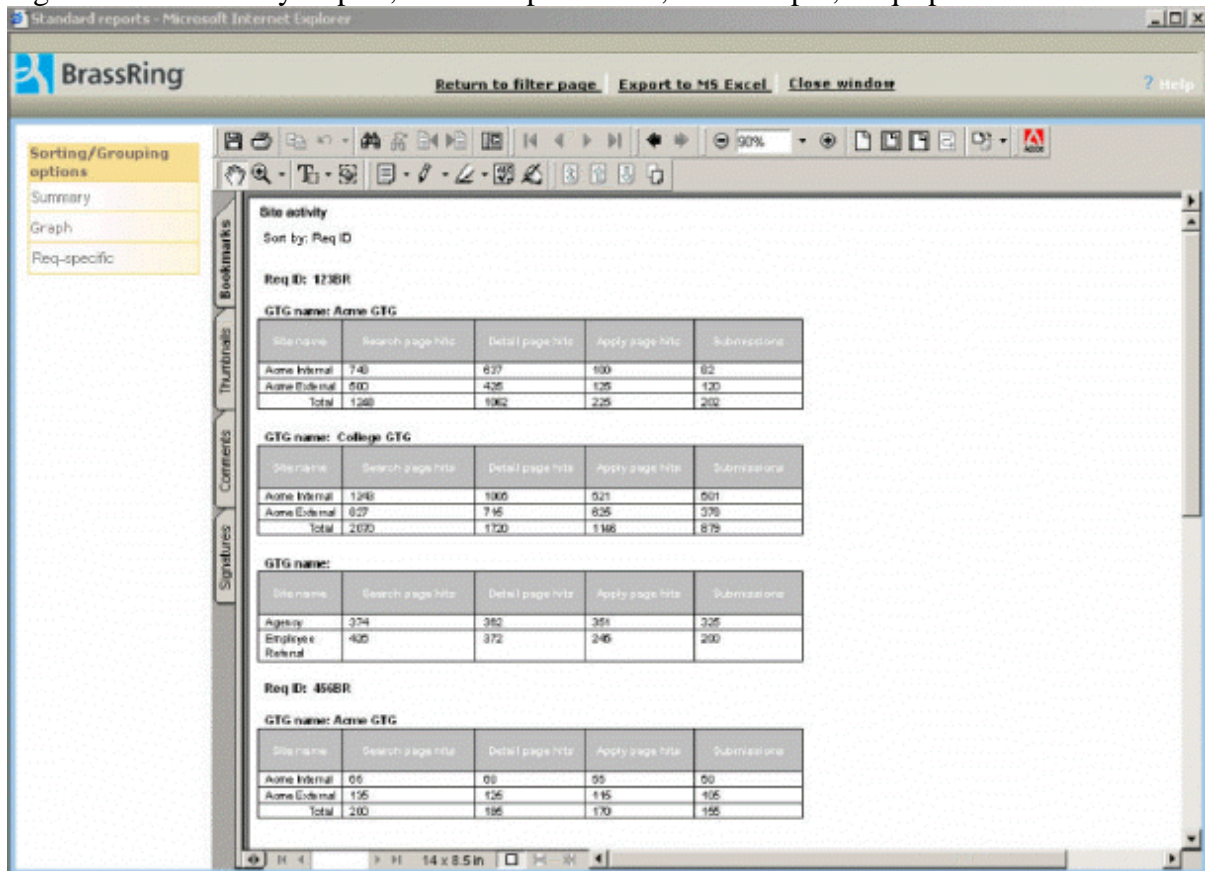Figure 6: Site Activity Report, GTGs Implemented, PDF Output, Req-Specific View

Table 8: Site Activity Report, GTGs Implemented, PDF Output, Req-Specific View

Field	Description
Report header	Site activity Sort by: [Req ID] The [Req ID] displays your organization's custom label for either AutoReqID or optional req ID in the language of your user locale. If no translated value is available for a specific locale, the Req ID label is displayed in the language of the base locale for your organization.
Req ID	[New in R10.5] The report data are grouped by individual Req ID. The label for Req ID is the client's custom label for either the AutoReqID or optional req ID in that specific user's locale. If a translated value is unavailable for a specific locale, display the label in the base locale.

Report content: GTG Title and output grid	The data are broken down by specific GTG site: TG site to which the job has been posted. When is a site counted under a GTG? A site is counted under a GTG if it meets the following two conditions: 1. At the time a candidate action is tracked, the site is a member of a GTG. AND 2. At the time the report is run the site is still a member of that GTG. Note: Sites that are not members of GTGs, including Agency Managers, are listed in the "GTG name: <blank>" section of the report. See below for more information.
Submissions	The Submissions column returns the actual number of KRB submissions during the specified filter date range for the listed site, including only req-specific submissions. If a candidate has submitted to multiple requisitions within a single visit to a site, this is captured as a single submission in the summary section of the report. Each individual submission per req is counted in the req detail section of the report. To calculate the drop-off rate for each individual site, you can compare data in the "hit" columns with the data in the Submissions column. Important! This means that the submissions total on the summary and detail portions of the report may not match.
Total row	The data are summed for each column in this row.
GTG name: <blank>	This section captures data for sites with activity in the selected date filter range that do not belong to a GTG. This category includes Agency Manager sites. The data in this section are not summed because each site captured in this part of the report is in its own category.
Footnote	If the report contains no req-specific information (for example, all submissions are 'jobless'), the following footnote displays on the Details page for the Req-specific report: "No req specific information available for the selected criteria."

Changes to Excel-Sortable Output Format

[Updated for R11]

The Site activity report in Excel-Sortable output consists of three (3) sheets with the following information:

Sheet 1: Report header and parameters

Sheet 2: Site-specific data (the Summary view)

Sheet 3: Req-specific data

The Submissions column returns the actual number of KRB submissions during the specified filter date range for the listed site, including req-specific or jobless apply submissions.

If a candidate has submitted to multiple requisitions within a single visit to a site, this is captured as a single submission in the summary section of the report.

Each individual submission per req is counted in the req detail section of the report.

To calculate the drop-off rate for each individual site, you can compare data in the "hit" columns with the data in the Submissions column.

Important! This means that the submissions total on the summary and detail portions of the report may not match.

See examples on the next page.

Excel-Sortable Output: No GTGs / Sheet 2: Site-Specific Data: No GTGs Implemented / Sheet 2: This sheet organizes the data by Site name.

Site name	Search page hits	Detail page hits	Apply page hits	Submissions	Returned profiles	Search agent created	Jobs e-mailed to friends
Agency portal	28	4	18	16	N/A	N/A	0
Acme Internal	728	725	700	687	600	6	4
Acme External	573	564	553	542	531	82	16

Excel-Sortable Output: GTG Enabled / Sheet 2: Summary View: This sheet organizes the data by GTG name and Site name. [New in R10.5] Submissions column: This column returns the total number of candidates who actually submitted a profile into KRB during the selected time period.

GTG name	Site name	Search page hits	Detail page hits	Apply page hits	Submissions	Returned profiles	Search agent created	Jobs e-mailed to friends
	Agency portal	28	4	18	16	N/A	N/A	0
Acme GTG	Acme Internal	728	725	700	687	600	6	4
Acme GTG	Acme External	573	564	553	542	531	82	16

Excel-Sortable Output: No GTGs / Sheet 3: Req-Specific View: This sheet organizes the data by Req Id and Site name. Users must have privileges to view the Req ID filter to be able to see the Req ID column for this report output.

Req ID	Site name	Search page hits	Detail page hits	Apply page hits	Submissions
123BR	Agency portal	28	4	18	16
456BR	Acme Internal	728	725	700	687
456BR	Acme External	573	564	553	542

Excel-Sortable Output: GTGs Enabled / Sheet 3: Req-Specific View: This sheet organizes the data by Req Id, GTG name, and Site name.

Req ID	GTG name	Site name	Search page hits	Detail page hits	Apply page hits	Submissions
123BR		Agency portal	28	4	18	16
456BR	Acme GTG	Acme Internal	728	725	700	687
456BR	Acme GTG	Acme External	573	564	553	542

Creating a Site Activity Report

To select filter criteria for the Site activity report follow these steps:

See page 5 for more information about revised filter criteria in Release 11.

1. On the Standard reports menu page, click Site activity in the Talent Gateway section.
2. The Site activity filter page displays.
3. Select the date range.
4. Make your selections for other filters.
5. Select the output for the report.
6. At this point you can generate the report now or you can schedule the report to be run at a later time.

   Click Generate report now to create the report immediately. The amount of time it

   takes to display the report depends on the size of the database.

   If you wish to schedule the report to be run on a recurring basis, click the Schedule

   report button.

Working with Site Activity Report Results

When completed, the report results display in the format selected on the filter page. Each row of the Site activity report displays statistics for a Talent Gateway or Agency Manager site.

1. View the report results. The Summary view is the default view. In the Summary view, the data are

   listed by either Site name (if GTGs are not implemented) or sorted by GTG name (if they are implemented).

2. To view results from a different view, select a different sorting/ grouping option:

   Graph

   Req-specific

   The report regenerates and displays again based on the new sorting/grouping option selected. There are some limitations on how some types of data can be sorted and grouped. For example, you can view data only about individual site activity in the Graph view.

3. Save, print, or select new sorting options for the report.

To export to MS Excel, click Export to MS Excel and follow the instructions.

To create another Site activity report, click Return to filter page, or click Back to return to the Reports menu page.

What "0" means in the Submissions column: If a Talent Gateway site has no default questions, attached forms, or code questions, the candidate submission is not logged to the database. For the Gateways with this specific configuration, the submission column is always = 0. This isn't a report issue but related to the way the data is stored on the back-end.

Example: PDF output Summary View

Site activity

Sort by: GTG name

GTG name: EN-L2-5510

Site name	Search page hits	Detail page hits	Apply page hits	Submissions	Returned profiles	Search agents assigned	Jobs e-mailed to friends
Brazil- Portuguese	7	1	6	4	4	0	0
FTG-Slovak	2	0	1	1	1	0	0
shibaTestTG	6	2	5	3	1	0	1
SK_French_ExternalGateway	7	1	4	4	2	0	1
Total	22	4	16	13	8	0	2

GTG name: Global Gateway - EN/UK/SP/FR

Site name	Search page hits	Detail page hits	Apply page hits	Submissions	Returned profiles	Search agents assigned	Jobs e-mailed to friends
Global Inc. - Spanish	1	0	0	0	0	0	0
Total	1	0	0	0	0	0	0

GTG name: Global_apamav

Site name	Search page hits	Detail page hits	Apply page hits	Submissions	Returned profiles	Search agents assigned	Jobs e-mailed to friends
Charu Full TG	1	0	1	1	0	0	0
GERMAN TG	2	2	2	1	0	0	0
sampleapama	1	0	4	0	1	0	0
Total	4	2	7	2	1	0	0

GTG name: GlobalL2-Charu

Site name	Search page hits	Detail page hits	Apply page hits	Submissions	Returned profiles	Search agents assigned	Jobs e-mailed to friends
Charu-French	0	0	1	0	0	0	0
Test org group	0	2	0	0	0	0	0
Total	0	2	1	0	0	0	0

Site activity

Sort by: GTG name

GTG name: GTG-(UK-US-GERMAN)

Site name	Search page hits	Detail page hits	Apply page hits	Submissions	Returned profiles	Search agents assigned	Jobs e-mailed to friends
DeepTg2_ita	1	0	0	0	1	1	0
FTG-German	2	0	2	2	0	0	0
FTG-UK	1	0	0	0	1	0	0
Global Inc. - US English	2	1	2	3	0	0	1
Total	6	1	4	4	2	1	1

GTG name: Shar Global GG

Site name	Search page hits	Detail page hits	Apply page hits	Submissions	Returned profiles	Search agents assigned	Jobs e-mailed to friends
FTG-US	1	0	0	0	0	0	0
Total	1	0	0	0	0	0	0

GTG name:

Site name	Search page hits	Detail page hits	Apply page hits	Submissions	Returned profiles	Search agents assigned	Jobs e-mailed to friends
123Agency	3	0	0	0	N/A	N/A	0
5108 TG FR	1	0	1	1	0	0	0
A.g.e.n.ice @ '#$%&Manager ()*	2	0	0	0	N/A	N/A	0
Add candidate	0	0	0	21	0	0	0
Add contact	0	0	0	9	0	0	0
Agency Manager name	4	0	0	0	N/A	N/A	0
agency&manager	2	0	0	0	N/A	N/A	0
ATGGridShiba	2	1	0	0	0	0	0
blue	2	0	0	0	N/A	N/A	0
Charu Agency Manager	4	0	3	0	N/A	N/A	0
CMD FullPtal Italano	1	0	0	0	0	0	0
EN-L2-5507	2	1	2	2	0	0	0

Site activity

Sort by: GTG name

Site name	Search page hits	Detail page hits	Apply page hits	Submissions	Returned profiles	Search agents assigned	Jobs e-mailed to friends
Enterprise English US Test TG	2	0	0	0	0	2	0
Enterprise Test TG for PS & QE Teams	1	0	0	0	0	0	0
Full TG	1	1	1	1	0	0	0
Global Inc - 個, Chinese 模版 版.	1	0	0	0	0	0	0
JGH I	9	0	1	1	0	0	0
JGH 特惠版 II	1	0	0	0	0	0	0
KM Agency Manager	10	0	1	1	N/A	N/A	0
KM Full Talent Gateway	28	5	33	19	7	9	4
MGTestFullGateway	6	0	19	1	0	0	0
MGTestSpanish	1	1	1	0	0	0	0
Nadia_NewFullTG - QA3	7	0	1	1	0	0	0
Pasta Agency Manager	1	0	0	0	N/A	N/A	0
ShilpaAgencyTest	3	0	0	0	N/A	N/A	0
Test AM	1	0	0	0	N/A	N/A	0
TGJapane	1	0	1	0	0	0	0
tsm AM test org group	1	0	0	0	N/A	N/A	0

Date generated: 5-Nov-2007 05:34:50PM

Browser and Operating System Support

The tables below indicate support for browser types and versions by operating system.

Table 1: For Recruiters (Kenexa Recruiter BrassRing):

	IE 5.5	IE 6.0	IE 7.0#	NS 7.1	FIREFOX 1.0.6	FIREFOX 1.5	FIREFOX 2.0
Windows NT	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Windows 2000	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Windows XP	N/A	Yes	Yes	Yes	Yes	Yes	Yes
Mac OSX 10.4.4	No	No	No	No	No	No	Yes

If you use IE 7.0, you can upgrade to Adobe Acrobat 7.0 or higher as Adobe recommends.

Table 2: For Candidates (Talent Gateways):

	IE 5.5	IE 6.0	IE 7.0#	NS 7.1	AOL 7.0	AOL 8.0	FIREFOX 1.5	FIREFOX 2.0	SAFARI 2.0
Windows NT	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Na
Windows 2000	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NA
Windows XP	N/A	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NA
Mac OSX 10.4.4	No	No	No	No	No	No	Yes	Yes	Yes

If you use IE 7.0, you can upgrade to Adobe Acrobat 7.0 or higher as Adobe recommends.

Table 3: For Kenexa Workbench Users:

	IE 5.5	IE 6.0	IE 7.0#
Windows NT	Yes	Yes	Yes
Windows 2000	Yes	Yes	Yes
Windows XP	N/A	Yes	Yes

If you use IE 7.0, you can upgrade to Adobe Acrobat 7.0 or higher as Adobe recommends.

Kenexa Recruiter BrassRing's supported platforms change from time to time based on current technology and use patterns. As of Release 9 (the previous release), Kenexa Recruiter BrassRing no longer supports Internet Explorer 5.01.

Kenexa reserves the right to modify the above requirements at any time upon notice to Customer.

Expanded Browser and OS Support

IE 7 support – The Internet Explorer 7 browser has been certified. Note: If you use IE 7.0, you can upgrade to Adobe Acrobat 7.0 or higher as Adobe recommends.

Firefox2 Win Support – The Firefox 2 browser has been certified.

Firefox2 MAC OS/X Support – The Firefox 2 browser has been certified on the MAC OS/X operating system for Kenexa Recruiter BrassRing and Talent Gateways.

Language Support by Browser

Microsoft® Internet Explorer® is available in all languages.

Netscape® is available in English, French, German and Japanese.

Mozilla® FireFox® is available in all Kenexa Recruiter BrassRing and Talent Gateway languages, except Canadian French and Iberian Portuguese

Safari™ is available in English, Japanese, French, German, Spanish, Italian, Dutch, Swedish, Danish, Norwegian, Finnish, Traditional Chinese, Simplified Chinese, Korean and Brazilian Portuguese.

The list of supported languages for each browser is subject to change. The latest versions of browsers may not be available in the listed languages.

Ongoing globalization

Kenexa Recruiter BrassRing is available in the languages listed below.

	Azerbaijani *		Hungarian
	Brazilian Portuguese *		Italian *
	Chinese		Japanese
	Czech		Korean
	Danish		Norwegian
	Dutch *		Polish
	English (International) *		Portuguese
	English (U.S.) *		Russian
	Finnish		Slovak
	French *		Spanish *
	French Canadian *		Swedish *
	German *		Turkish

Azerbaijani TG Translation

Description

Kenexa Recruiter BrassRing supports Azerbaijani as a Talent Gateway language.

New Functionality or Replacement

This is new functionality.

Overview of Implementation

Your organization can purchase "Azerbaijani" as a supported Talent Gateway language. Contact your Kenexa representative if you are interested in adding this language.

Time Frame of Implementation

This feature is available in Release 10.

Cost

There is a cost for purchasing an additional Talent Gateway language.

User Experience

Candidates using this gateway will see all standard text and headings in Azerbaijani. Custom text translations should be provided by your organization.

Add Candidate/Contact Talent Gateways

Description

Kenexa has simplified the creation of Add Candidate/Contact Talent Gateways (AC/C TGs), and improved the workflow by integrating the "Add note" and "Launch Talent Record" features into multi-language Talent Gateways. This means that translated AC/C TGs will include the "Add note" and "Launch Talent Record" functionality and be available from the Add candidate/contact menu item in KRB.

Your organization can choose any of the following:

Designate any basic Talent Gateway as an AC/C TG

Enable "Add notes" for individual AC/C Talent Gateways

Enable "Launch talent record" for individual AC/C Talent Gateways

Create many different types of AC/C TGs, by language, by division, or by some other category

View and administer AC/C TGs from their own listing page (as long as one customized AC/C TG has been created) separate from other Talent Gateways, which are still listed on the **Talent Gateway administration** page

Customize user instructions for the **Add Candidate/Contact Gateways**

New Functionality or Replacement

This is new functionality

Benefits

This feature extends the unique branding and customization capability, including multiples of the same language, to Add Candidate/Contact functionality. It is a multidivisional and multinational enhancement.

The "Add Notes" and "Launch Talent Record" features are available to all basic Talent Gateways.

Details/Limitations/Known Interactions

If a your organization does not create an additional AC/C TG and you only have the system-supplied Talent Gateway, the listing page in KRB does not appear when users select **Add candidate/contact** from the menu. Instead, the system-supplied Talent Gateway opens in a new window. This functions the same as existing functionality.

Overview of Implementation

Additional Add Candidate/Contact Gateways can be added by Kenexa

Time Frame of Implementation

This feature is available in Release 10.

Cost

There is no additional cost for this feature. However, there may be additional fees associated with adding additional AC/C TG if they do not already exist. Please contact your Kenexa representative for more details.

Visible Changes

There are no Visible Changes without configuration.

User Experience

The new **Add Candidate/Contact Gateways** page in Kenexa Recruiter BrassRing lists the available Add Candidate/Contact Talent Gateways. This page is only available if your organization has added one or more additional AC/C TGs in addition to the system generated TG.

To access this page, select **Candidates > Add Candidate.**

To open a Talent Gateway, click the **Launch** icon 🖥 for the Talent Gateway you want to open. The gateway is launched in a separate window.

Figure 30: Add Candidate/Contact Gateways page in KRB

KRB Candidate Menu Changes

The Candidates menu changes once your organization has created one custom AC/C Talent Gateway. It displays only the Add Candidate menu item; the Add Contact menu item has been removed.

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Candidate Status Check

Using full Talent Gateways, candidates can now check status of job submissions or withdraw a submission, and referring employees can check the status of their referral.

"Candidate status check" is configurable by Gateway.

The Gateway can display job status, submission status, or both.

New Functionality or Replacement

This is new functionality.

Benefits

Candidate status check helps eliminate the "black hole" for candidates and referring employees by providing status feedback on the Gateway.

Overview of Implementation

Candidate status check is available for any Platinum service level Talent Gateway. This feature must be activated by Kenexa.

Time Frame of Implementation

This feature is available in Release 10.

Cost

There is no additional cost for this feature.

Visible Changes

There are no Visible Changes without configuration.

User Experience

The candidate or referring employee sees the Job submission status page.

Job submission status

Follow up on the status of your job submission.

Job title	Job requisition ID	Job submission date	Job status	submission status
Senior Product Manager	100BR	15-Jun-2006	Open	Not a match
Software Engineer	200BR	13-Jun-2006	Open	Under consideration
Quality Engineer	150BR	13-Jun-2006	Close	Not a match
Software Engineer II	202BR	13-Jun-2006	Open	Under consideration

Figure 1
: Job submission status page

Configurable "Narrow Display" for Talent Gateways

Description

Your organization can use the new "narrow template" to add branding to your navigation bar and display it on all candidate pages in Talent Gateways, providing a consistent and positive candidate experience. These settings are configured at the individual Talent Gateway level. This feature is available for Basic and Full Talent Gateways in this release.

New Functionality or Replacement

This is new functionality.

Benefits

The narrow template gives you more flexibility in branding and navigation on your Talent Gateways.

Details/Limitations/Known Interactions

None.

Overview of Implementation

This feature is available for Basic and Full Talent Gateways, and is configured by Kenexa

Time Frame of Implementation

This feature is available in Release 10.

Cost

There is no additional cost for this feature.

User Experience

If this setting is turned on for a Talent Gateway, the following pages are affected:

View resume

    Job apply
    Jobless apply
    Resume/CV manager

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Profile information

Job apply
Jobless apply
Edit profile

Customizable "Intro Text" on the "Additional info" Page

Your organization can customize (or even remove entirely) the standard introductory text displayed on the `Additional information` page of the candidate's application workflow. This page applies only to Gateways that have a candidate form attached.

The default text for this field is: "Please answer a few additional questions." The customized text can be 4000 characters of text or HTML. HTML tags are included in the character count.

The default text can also be removed entirely from the page. If your organization chooses to leave it blank, no introductory text appears at the top of the `Additional information` page.

New functionality or replacement

This is new functionality.

Benefits

The feature provides additional Talent Gateway configurability and branding.

Details/Limitations/Known interactions

None.

Overview of Implementation

This feature is configured by Kenexa for Basic Talent Gateways. It can be configured by a Workbench Certified User for Full Talent Gateways

Time Frame of Implementation

This feature is available in Release 10.

Best Practice Recommendations

None.

Cost

There is no additional cost for this feature.

Visible Changes

There are no Visible Changes without configuration.

User Experience

Candidates see either the default text on the Additional information page ("Please answer a few additional questions."), customized text, or no text, depending on what your organization chooses to do.

Figure 29: Customize Introductory Text on the Additional Information Page
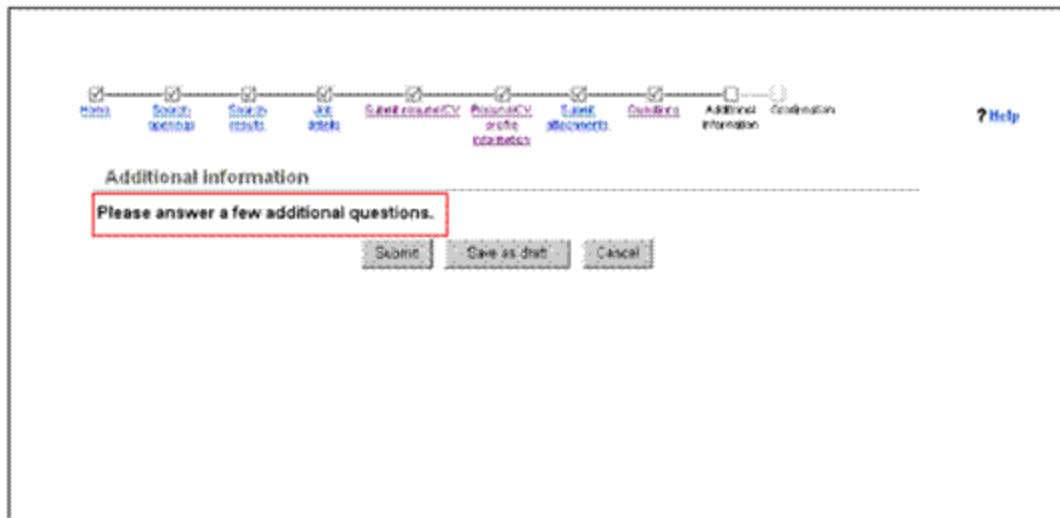
Limit Candidate Applications

Description

Your organization can configure limits on how many submissions it will allow from the same candidate from any full Talent Gateway.

For each Talent Gateway, you can limit the number of reqs a candidate can include in a single submission, and the total number of req submissions within a configured time period:

☐ The configurable concurrent submissions limit is 1 – 25.

☐ The configurable total submissions limit per period is 1 – 100. The period can be a month, year, or a configured number of days.

Your organization can also configure the error message that explains these limits to candidates.

New Functionality or Replacement

This is new functionality.

☐ There are three (3) new settings per Talent Gateway:

☐ Maximum concurrent req submissions

☐ Maximum total req submissions per period

☐ Period for maximum submissions

There are three (3) new text customization areas per Talent Gateway:

☐ Maximum concurrent req submissions error message

☐ Maximum total submissions exceeded error message

☐ Reduce current submission to avoid exceeding maximum error message

Benefits

Your organization can configure a Gateway to match the business rules of a particular program or candidate pool. This feature also reduces the administrative burden of excessive submissions from a single candidate.

Details/Limitations/Known Interactions

This feature does not include the ability to restrict new submissions based on current HR Status of the candidate against other requisitions.

The submission limits apply only to Gateway submissions for the Gateway in which the limits have been set. The limits do not apply to applications submitted through other Talent Gateways, system user filing, integration, Talent Data Center or other input methods are not counted toward the limit.

Best Practice Recommendations

None.

Overview of Implementation

This feature must be activated by Kenexa. Text customization areas can be added and maintained by a certified Workbench user.

If your organization does not use submission limits, the default system behavior limits candidates to applying to 10 jobs in one session, but does not limit the overall total number of submissions. Candidates can apply to 10 jobs in one action, but can repeat this action on another 10 immediately after or on another day, without limit. This is the default system behavior prior to the configuration of submission limits.

Time Frame of Implementation

This feature is available in Release 10.

Cost

There is no additional cost for this feature.

Visible Changes

There are Visible Changes associated with this feature for both the Talent Gateway and Workbench users. See the "User Experience" section next for more information.

User Experience

Talent Gateways candidate experience

Without this feature activated, candidates continue to select **Apply** on the job details page, or to select one or more jobs on the job search results page, and then select **Apply**.

When this feature is enabled, the system checks the number of reqs selected for the submission against the configured **Maximum Concurrent Req Submissions** value.

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☐   If the selected number of reqs is less than or equal to the configured **Maximum Concurrent Req Submissions** value, the application process proceeds unchanged from the current process.

☐   If the selected number of reqs is more than the configured **Maximum concurrent req submissions** value, the Talent Gateway displays an error message containing the default message or the configured text for the **Maximum concurrent req submissions error message** setting.
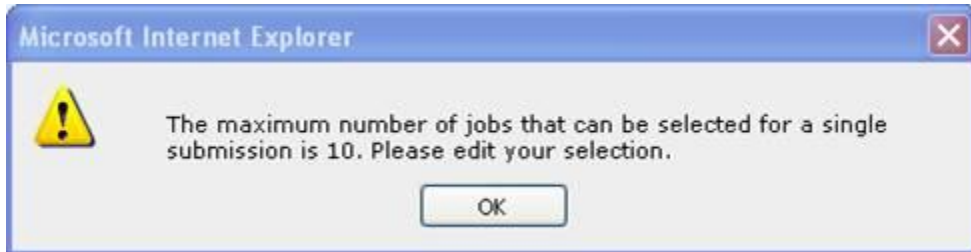
Figure 2: "Maximum concurrent req submissions" error message

> Following this check on the number of reqs selected, the candidate is prompted to log in (if he or she is not already logged in).

After the candidate has logged in, the system does the following:

1. Checks the candidate's total number of job applications via the Talent Gateway through which the current application is taking place

2. Checks the total number of jobs associated with the current submission

3. Compares those two numbers from Step 1 and Step 2 to the "maximum total req submissions per period" setting

There are three possible scenarios:

☐   The current submission plus past submissions do not exceed the number of allowed submissions. In this case, the application process continues.

☐   Before the current submission, the candidate has previously submitted the maximum number of allowed submissions. In this case, the Talent Gateway displays an error message with the text from the configured text stored in the **Maximum total submissions exceeded error message** setting. The candidate will not be able to continue with the submission.
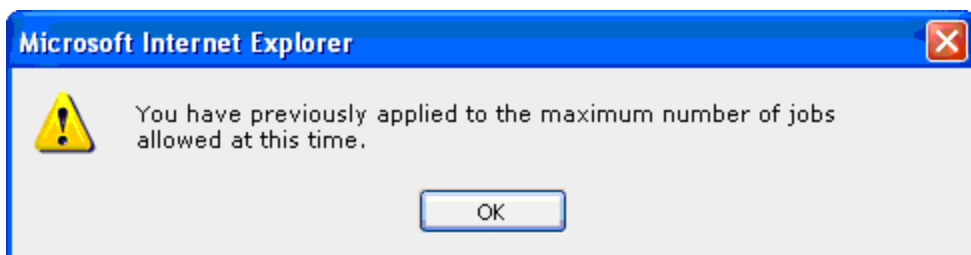
Figure 4: "Maximum total submissions exceeded" error message

☐   The current submission containing more than one job exceeds the number of allowed submissions. In this case, the Talent Gateway displays an error message that will be raised with the text from the configured text stored in the **Reduce current submission to avoid exceeding maximum error message** setting. (**Note:** The "3" in the error message is a calculated value which varies based on the calculation for the specific candidate and Talent Gateway combination each time the error condition is met.) The candidate will be able to reduce his or her selected jobs and then proceed with the submission.

Figure 3: "Exceeding maximum" error message

Prevent Form Submission when Configured Fields are Blank

Description

This feature is available in Release 10.1 on August 31, 2007.

A Talent Gateway will create a candidate form relevant to a given submission, regardless of whether the candidate has filled out each optional field or not. In certain circumstances, Blank forms with blank data elements are undesirable, particularly for sensitive data such as EEO information, which cannot be required from the candidate. The existence of a form without these data elements may create the erroneous perception that candidates have supplied the required data when, in fact, they have not. Based on user privileges appropriate to sensitive data, recruiters can see whether or not a form is present, but would need to open the form to determine whether it contains data. These users are restricted from opening the form to determine whether data fields are blank.

With Release 10.1, your organization can choose to enable a setting which prevents a form from being created with a candidate submission unless specified fields are completed.

If your organization decides not to use this feature, there is no change to existing functionality. If a candidate encounters a form on the Talent Gateway, leaves all fields blank, but still saves the form, the form may be attached to the candidate's Talent Record as a blank form as it is today based on the existing form field configurations under certain circumstances.

If your organization decides to use this feature, it is turned on a per form and field basis. If a candidate encounters a form on the Talent Gateway for which this feature is enabled, leaves some or all of the fields on the form blank that your organization has specified as being required for form creation, but still saves the form, whether the blank form is not attached to the candidate's Talent Record is determined by the form setting.

This setting does not affect forms with required fields. If a form contains any required fields, the candidate must fill them in; otherwise, s/he will not be able to save the form.

New functionality or replacement

This is new functionality.

Benefits

Recruiters will know at a glance when a candidate has supplied at least some information on a candidate form deemed critical, but not set as required on the form, giving them greater flexibility for handling sensitive data.

Details/Limitations/Known interactions

This functionality does not extend to integrations or other methods of adding forms such as eLinking within KRB. It applies only to when a form is attached to a full or basic Talent Gateway.

Implementation Decisions

If your organization is currently experiencing the creation of blank or incomplete forms that are attached to Talent Gateways and you would like to restrict forms from being created unless certain fields are completed without making them actually "required" to the candidate, consider the following:

Decide which fields on the form should determine if a form is created.

Decide if the criteria for form creation is if ANY one of the specified fields is completed, or if EVERY one of the specified fields are completed.

Overview of Implementation

This feature is configured by Kenexa or by a certified Workbench user.

Time Frame of Implementation

This feature is available in Release 10.1 on August 31, 2007.

Best Practice Recommendations

None.

Cost

There is no additional cost for this feature.

Visible Changes

There are no visible changes associated with this feature.

Use Resume PDF as your Talent Record View

Description

If there is a PDF of the candidate's resume available, your organization can select that as the default view for its Talent Record in Kenexa Recruiter BrassRing and via eLinks. KRB already provides two additional options to select as the default view, the Overview tab and Resume text. The Overview tab is the default setting.

For this new feature to work, a PDF version of a candidate's resume must be the most recent version submitted attached to the Talent Record. In this case, when the KRB user opens the Talent Record, a second window containing the resume PDF launches automatically.

The screen below depicts the new Resume PDF window in KRB. If the user closes the PDF, s/he can select the View PDF button to relaunch the record.
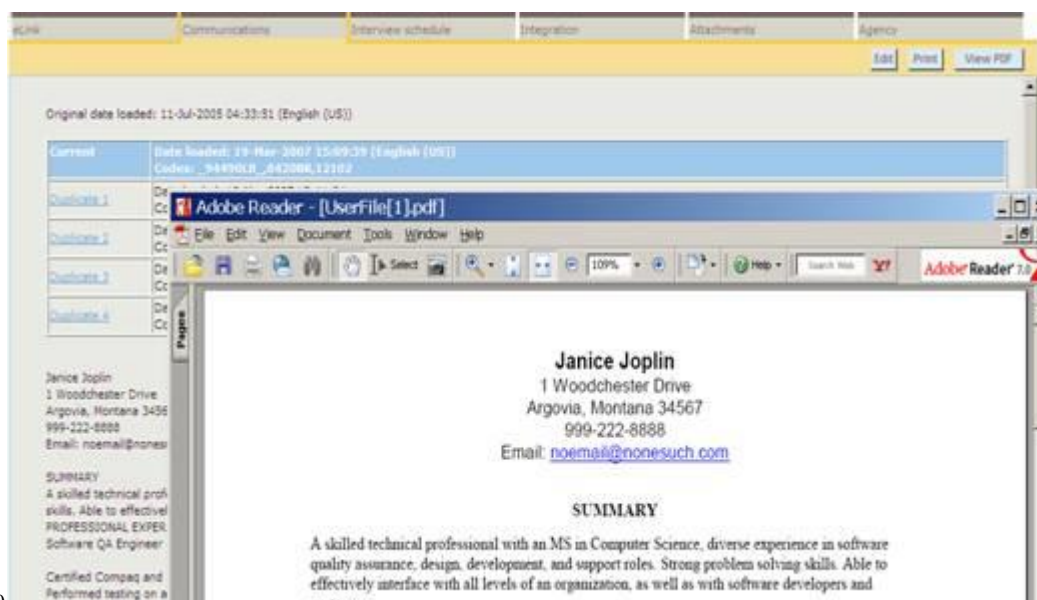
Figure 10
: Talent Record using Resume PDF as its default view

You can eLink the resume PDF: If the Resume PDF default view is turn on and a PDF resume exists, KRB users can eLink the PDF Resume. If the KRB user closes out of the page, he or she can select the PDF Resume/CV tab to relaunch the resume.

New or Replacement Functionality

This is both new and replacement functionality.

Benefits

KRB users can save steps when viewing candidate resumes and can easily eLink the PDF version of the resume.

Details/Limitations/Known Interactions

For settings to work, a PDF version of a candidate's resume must be the most recent version submitted attached to the Talent Record. When eLinking, the eLink must be sent from the version where the PDF is attached.

Please make sure any pop up blocking settings are turned off on your browser. When viewing the Talent Record from within KRB, pop up blockers must be turned off in order to default to the PDF view since this is done via a pop up window.

Overview of Implementation

This feature is activated by Kenexa.

Time Frame of Implementation

This feature is available now.

Cost

There is no additional cost for this feature.

Visible Changes

There is no visible change without configuration.

User Experience

KRB users will see the PDF version of the candidate's resume as their entry into the candidate's Talent Record when there is a PDF version available with the most recent submission.

Update HR Status via eLink

KRB users can update a candidate's HR status through an eLinked Talent Record sent to them by e-mail without being logged in to Kenexa Recruiter BrassRing. Hiring Managers can easily fill in forms and disposition candidates when working outside of KRB.

Please see "Details/Limitations/Known Interactions" on page 3 for more information.

Benefits

This feature increases the flexibility and productivity of Kenexa Recruiter BrassRing users who can update HR statuses without being logged in.

Visible Changes

The visible changes associated with this feature are as follows:

Prior to release 10 a System user with "update HR status" privileges could see HR statuses but could not update them from the **HR status** tab on an eLink.

With release 10, System users with "HR status (via eLink)" privileges can see HR statuses and can update any statuses for a Req, Working folder, or My Inbox to which they are associated as a team member or owner.

Details/Limitations/Known Interactions

User Type Privileges Required

Senders of HR status update eLinks are KRB system users (by definition). They send the eLink by email with the HR statuses included.

To update HR statuses through an eLink, recipients must be system users and have the user type privileges described below.

System users without the user privileges: Recipients who are system users do not see the **Update HR status** option unless the appropriate user type privileges are turned on.

Non-system users: Elink recipients who are non-system users can view the HR status (which is current functioning) but not update it.

To be able to receive eLinks used for updating HR statuses, and to update them, a user must:

☐   be a system user (that is, not an external user)

☐   be a member of the req team or working folder in which s/he is updating the HR status or have HR Status update all privileges.

☐   have one of the "Candidate Actions 2" user type privileges turned on:

- 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

Both of these privileges are not selected by default, so they have to be configured explicitly.

The Update HR status option displays only when the eLink recipient has **HR status (via eLink) add/update all** or **HR status (via eLink) add/update my** privileges turned on.

If the user has **HR status (via eLink) add/update my privileges** turned on (and no other privileges that would extend his or her actions on HR statuses to additional candidates) s/he can see only those HR status update hyperlinks for candidates with statuses residing in folders for which s/he is a member of the req team or working folder.

If the eLink recipient is not a system user, s/he can view the HR status but not update it, which represents no change to current functioning.

Workbench Configuration

Certified Workbench Users (or Kenexa) must turn on HR status (via eLink) privileges in Workbench.

To turn on the HR status (via eLink) user privilege:

1. Log in to Workbench.

2. Select **Tools > Users > User types.**

3. The User types page appears.

4. Locate the User type you want to modify in the grid and click the Edit type permissions icon (pencil) in its row.

5. The Edit user type step 1: Set name and functions page appears. If the checkmark before a function means the selected user type has some privileges of this type already set. If a function does not have a checkmark next to it, the selected user type does not currently have any privileges of this type.
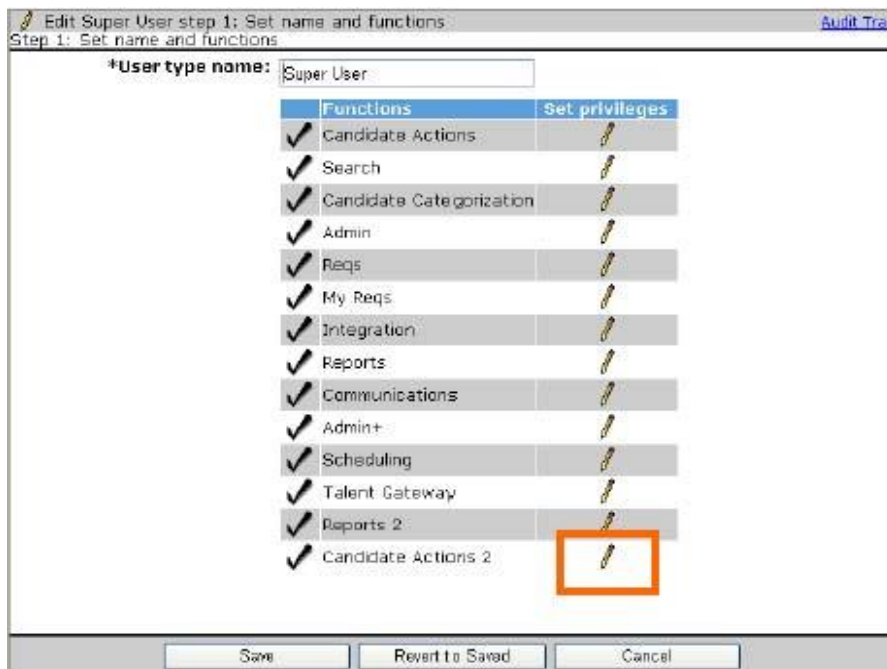
Figure 1: Edit [User type] step 1: Set name and functions Window

6. Click the Set privileges icon for Candidate Actions 2.

7. The Edit [User type] step 2: Set Candidate Actions 2 privileges page appears.

8. Select one or both of the HR status (via eLink) privileges as shown below.
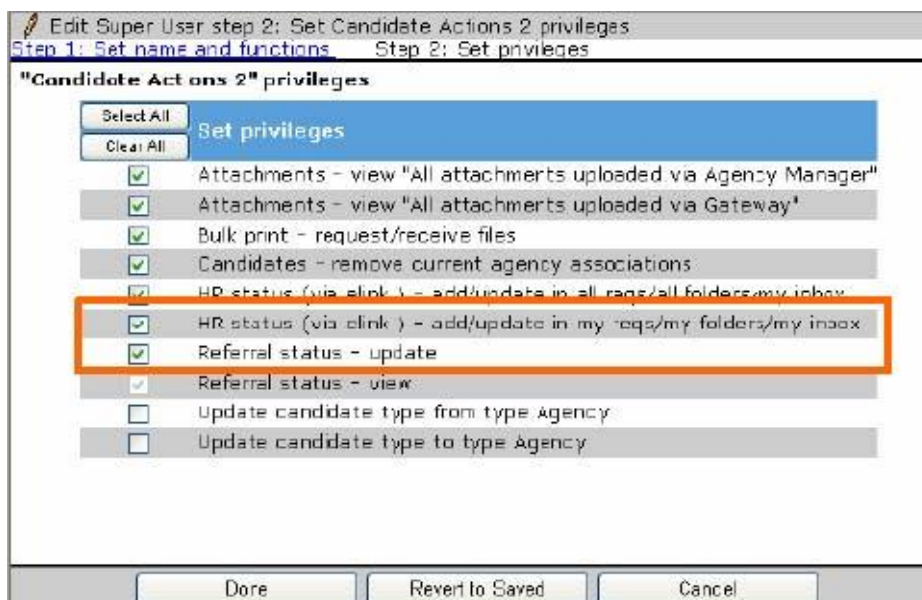
Figure 2: Candidate Action privileges for "update HR status"

9. Click **Done** to save your changes.

Who Can Update HR Statuses?

The rules for updating and undoing HR statuses in KRB apply to the eLink functionality. KRB system users must meet one of the acceptable membership conditions in the table below in addition to having the required user type privilege turned on to be able to update HR status through the HR status link.

User type privileges	Membership	Update HR status link
The HR status (via eLink) add/update All reqs / All folders / my inbox user privilege is turned on for this user	The user does not need to be a member of the req or working folder in order to update the HR Status.	All HR Statuses will display as hyperlinks to the Update status page. (the same as if the user were logged in to KRB)
The HR status (via eLink) add/update My reqs / My folders / my inbox user privilege is turned on for this user	The user can be a member of the req or working folder, but does not have to be a member. OR The user is the Creator, Recruiter, Hiring Manager or Req Team member of the particular req associated with the HR status link. OR The user is the Owner or Team member of a particular Working folde	The HR status displays as a hyperlink which links to the Update status page (the same as if the user were logged in to KRB)

Interaction of ELinks with Other KRB Features

HR Statuses that trigger auto close: These HR statuses never display as an update option for users updating HR Status via an eLink.

HR Statuses that trigger position countdown : These HR statuses never display as an update option for users updating HR Status via an eLink.

HR Statuses updated via an eLink: These HR statuses can trigger integrations if one is configured for the selected HR Status.

HR Statuses updated via an eLink: Any HR status updated via eLink can trigger automatic e-mail communications if they are configured for the selected HR Status.

HR Statuses updated via an eLink: Any HR status updated via eLink can trigger a pop-up form if a form pop-up has been configured in workbench for the particular HR status.

Form field integrations – Clients can use Form field integration to pass form field data automatically. The client configuration for HR status update by eLink must meet the requirements for Form field integration clients. See the next section for more information

Integration Types that Pass Form Field Data

Your organization may currently have triggers that pass form field data automatically. Under these circumstances, the integration could potentially fail if a KRB user does not complete a form containing data required by the integration.

Warning: If your organization has integration that depends on form fields to be completed, please talk with your Kenexa representative about possible risks and keep in mind the following:

1. Make sure KRB users include any associated forms that are required for integration as a **form to be completed** within the eLink. There is no way to ensure that the proper forms will be completed, however, so you may want to consider Option 2 below.

2. Turn off the user privilege to **Update HR status** for users working outside of KRB. This can be done either by a certified Workbench user or through a Kenexa representative.

User Experience – KRB Users

What Constitutes "Working" with a Candidate?

You have a working relationship with the candidate when you are in a "my candidate" relationship to the candidate. This relationship exists when one of the following conditions is met.

You are one of the following:

☐ The creator of an Open Req for which the candidate has a current HR status, including the initial 0-filed status.

☐ The Hiring Manager for an Open Req for which the candidate has a current HR status, including the initial 0-filed status.

☐ The Recruiter for an open Req for which the candidate has a current HR status, including the initial 0-filed status.

☐ A Requisition Team Member of an Open Req for which the candidate has a current HR status, including the initial 0-filed status.

Or the candidate has a current HR status (including 0-filed status) and is in your Inbox, or an active working folder to which you have access.

Sending an eLink to KRB Users Who are not Logged In

To send an eLink to another KRB system user who is not logged in, so that the recipient user can update HR statuses, follow these steps:

Remember! The eLink recipient must be a system user and have the user type privilege for "HR status update via eLink in all reqs/all folders/my inbox" or "HR status update via eLink in my reqs/my folders/my inbox" user privilege turned on in order to have the ability to update the HR Status from within the eLink. Otherwise, the eLink recipient will be able to view the HR status but not update it.

1. Log in to Kenexa Recruiter BrassRing.

2. Navigate to the Req folder containing the candidate whose status is to be updated. You can select more than one candidate, if applicable.

3. On the candidate's **Talent Record** page, click **Send eLink** in the **Actions** menu or from the eLink tab. Note: If you are viewing multiple Talent Records, click through each Profile and select the checkbox explicitly for the candidates you want to include in the eLink as in the figure below.
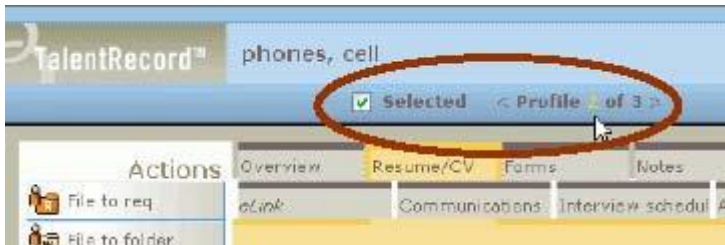
Figure 3: Talent Record – Selecting multiple candidate profiles

4. The **eLink candidate :** page appears. See Figure 4 below.

Important! Complete the fields on the page, making sure to check the **Include HR status** checkbox.

5. If you want the recipient to complete one or more forms, select the forms in the **Forms to complete** field.

Important! If your company uses any type of integration that passes form field data, you must make sure that you include **Forms to complete**. See page 7 for more information about integrations and form fields.

Figure 4: eLink candidate (Include HR status and Forms to complete)

6. Click **Send** when you have finished filling out the fields on the page. The e-mail "update Hr status" eLink is sent to the recipient and a confirmation is sent to your system e-mail address.
   Otherwise:
   Click **Clear** to empty the fields and start again. Click **Cancel** to close the window without sending an eLink.

Receiving and Updating HR Statuses via eLink

To update a candidate's HR status via eLink:

1. Open the e-mail containing the eLinked candidate Talent Record. The subject line is in the following syntax:

   eLink re: reqID: <Req. No.>: <Job Title>: <Candidate Name>

   For example: eLink re: reqID: 5376BR: Tax Accountant James Killon

2. In the e-mail, click the candidate name candidate name eLink. (There are two candidate name eLinks in the image below.)

Figure 5: E-mail containing eLink to update HR status

3. The **Overview** tab of the candidate's Talent Record appears.

4. Click the **HR status** tab. The tab displays the candidates current HR status and the HR status eLink.

Figure 6: HR Status Tab with current HR status eLink

5. Click the HR status link in the HR status column.

6. The **Update status** window for the candidate opens.

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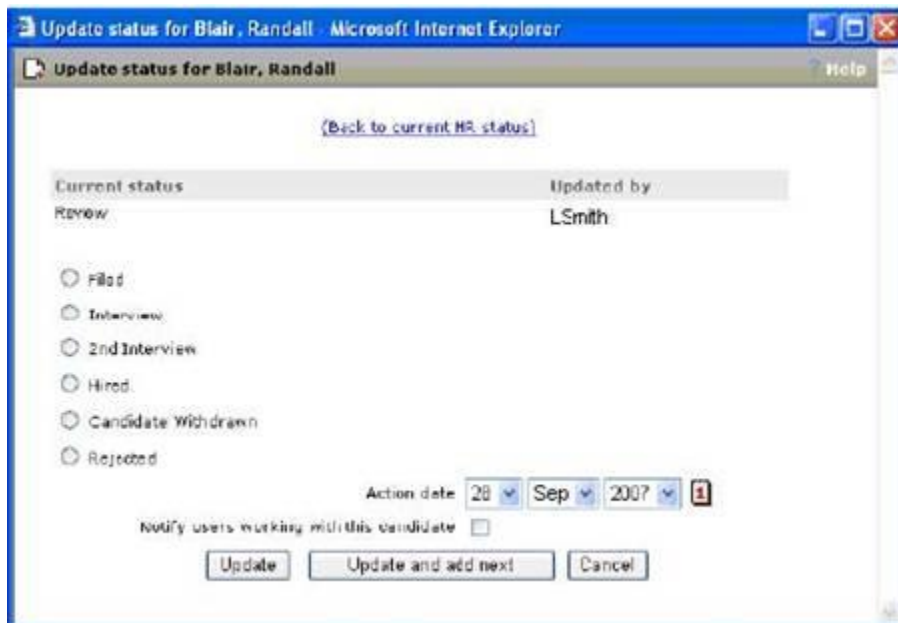
Figure 7: Update status window available through eLink

To update the HR status:

1. Select the radio button for the HR status you want to update to.

2. Select the **Action date**.

3. Check the **Notify users working with this candidate field** if desired. Checking this box triggers an e-mail notification to all users working with the candidate when the candidate's HR status is updated. See page 8 for an explanation of what constitutes "working with the candidate."

4. Click Update to simply update the field and display the confirmation page.

If you are updating the status for multiple candidates, click **Update and add next** to display the next **Update status** page.

Otherwise, click **Cancel** to close the window without updating the HR status.

Updating Intermediate Statuses

eLink recipients who are updating intermediate HR statuses can click **Undo status** to undo the HR status update. If the user clicks **Undo status,** the candidate is returned to the previous HR status and the **Update status** page for the previous HR status is displayed.
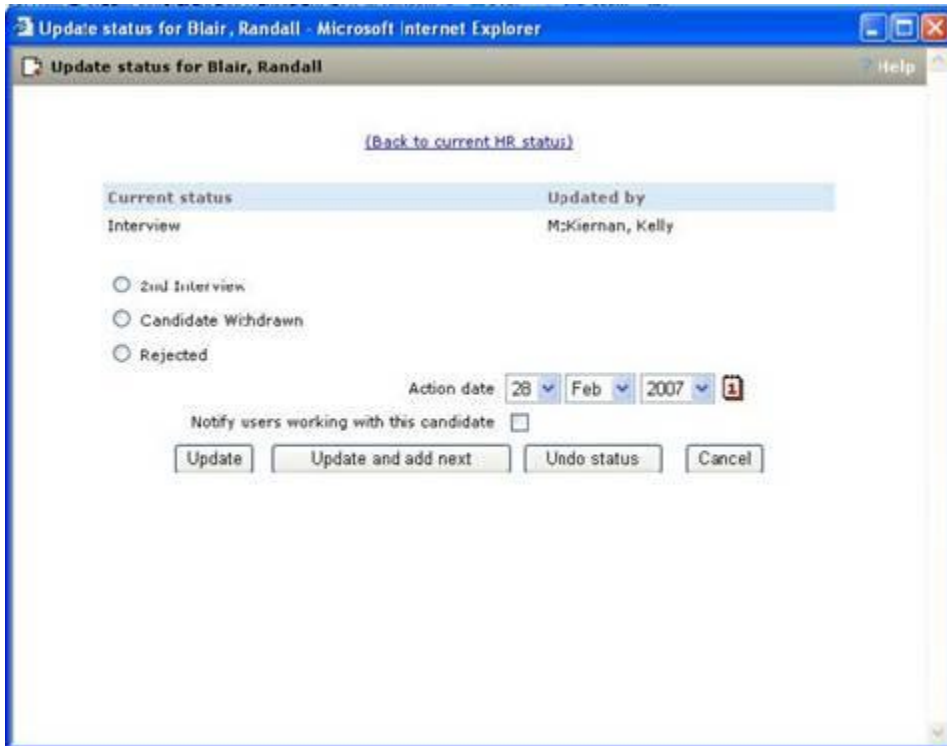
Figure 8: Updating intermediate statuses

Updating Final Statuses

eLink recipients who are updating final HR statuses can click **Undo status** to undo the HR status update. If the user clicks **Undo status**, the candidate is returned to the previous HR status and the **Update status** page for the previous HR status is displayed.

When the user updates the candidate to a **Final status** and does not undo it, a confirmation window appears, confirming that the candidate's status was updated.
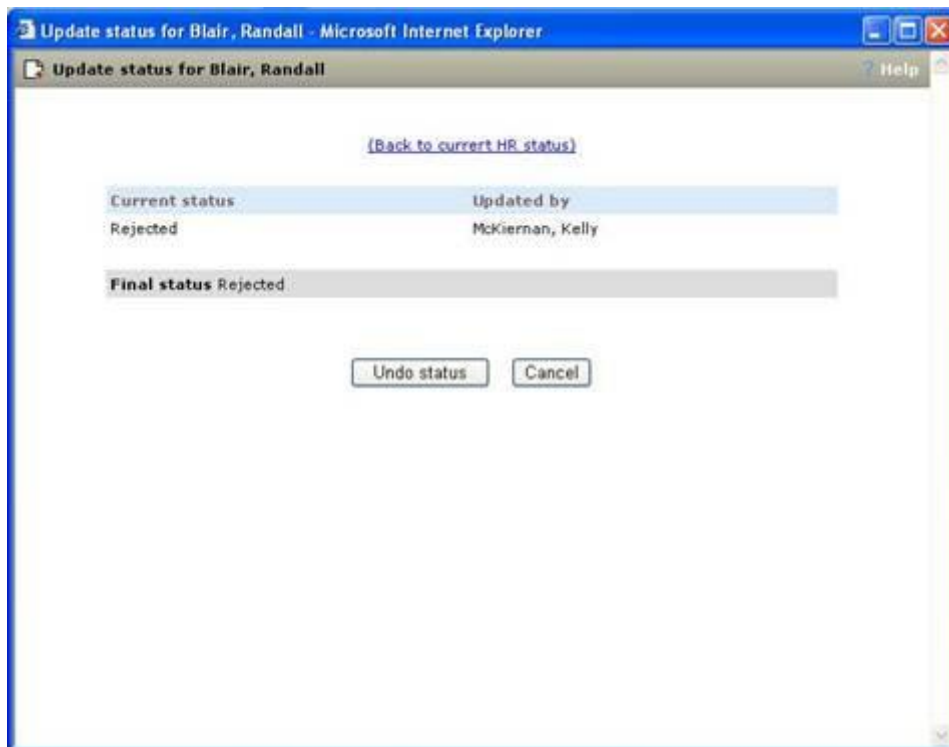
Figure 9: Update HR Status of Candidate to Final Status

Responding to the eLink

From this window, you can request an action , add a note, and send the response.

To respond to the eLinked HR status:

1. Click **Respond** in the top right corner of the HR status tab on the eLinked Talent Record.

2. In the **Respond to eLink** window, select the new HR status for the candidate from the **Request the following** dropdown list.

3. Enter a note in the **Note text** box if desired. Check the checkbox if you want the note saved in your notes archive.

4. Click **Send** to complete the transaction. You have updated the candidate's status and replied to the original sender of the eLink. Otherwise, click **Cancel** to close the window without making any changes.

Figure 10: Respond to eLink Window

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Release 10 WBSS Configuration

Prevent Editing of Custom Req Fields During Req Creation

This feature extends the existing custom req field attribute of restrict from editing by user type to the Req creation process.

By default, KRB users can edit custom req fields along with other editable fields during the "Add req" and "Edit req" process. With Release 10, you can extend the current functionality to make custom fields not editable on a field-by-field basis during the "edit req" process. You can extend the non-editability to the "add req" process if desired.

This feature applies to the following req creation methods: Save as new, eLink blank req, External req URL, and creating a req from an e-mail request.

It does not apply to requisitions coming into the system through Req import or Integration.

à To make a custom field non-editable on the Edit req page, follow these

steps:

1. Log in to Workbench.
2. Select Tools > Forms > Req forms. The Req forms page appears.
3. Locate the req form on the grid containing the custom field(s) that you want to change

   and click its Administer req fields icon. The Administer custom fields page for that req form appears.

4. Locate the custom field you want to edit on the grid, scroll all the way to the right, and click its Edit field attributes icon. The Edit field attributes window appears.
5. Locate the custom req field you want to change in the grid and click its Edit field attributes icon. The Edit field attributes page opens.
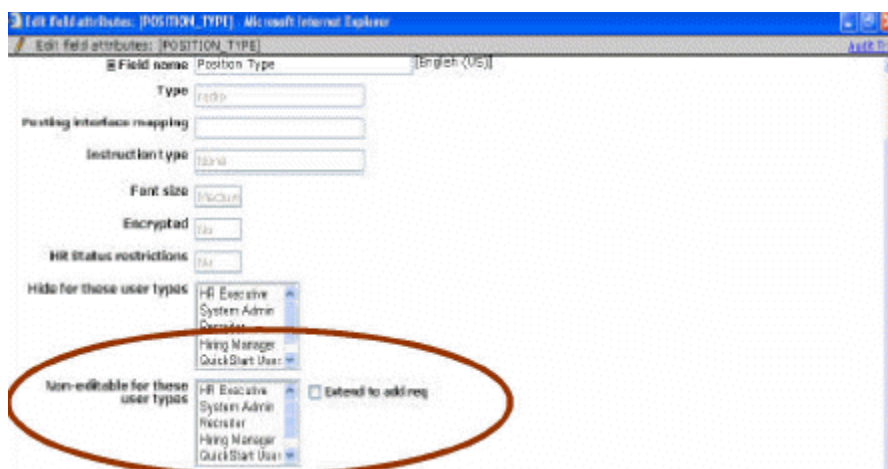
Figure 1: Making custom req fields non-editable

6. Scroll down to the Non-editable for these user types field. Select one or more user types who will not be allowed to change this custom field during the edit req process.

7. To extend the restriction on editing to the Add req page, check the field Extend to add req.

   If you leave Extend to add req unchecked, KRB users can still change that particular custom req field while creating reqs but will not be able to change it if they are editing a req containing that field at a later time.

   If you check Extend to add req, the custom req field is always non-editable (in both add and edit mode) for those user types selected in the Non-editable for these user types field.

8. Click Save. The custom req field appears as read-only on the Req form in KRB.

The two settings in combination (Non-editable for these user types and Extend to add req) make this particular custom req field fully non-editable/read-only for the selected user types when they are adding or editing a req.

Rules

The following rules apply to the Non-editable for these user types and Extend to add req fields:

If you make the custom field required for a specific user type, you cannot also make that field non-editable/read-only for that user type. If you try to do so, Workbench displays an error message when you attempt to save.

¡ You can make a req field non-editable/read-only for the "edit req" process only, if desired. ¡ You can make a req field non-editable/read-only for both the "edit req" and "add req"

processes, if desired.

¡ You cannot make a req field non-editable/read-only or the "add req" process only. If you want

to make the custom field non-editable/read-only during the "add req" process (which you do by checking the Extend to add req field), you must select at least one user type for the Non-editable for these user types field. If you attempt to save your changes without selecting at least one user type in the Non-editable for these user types field, Workbench displays an error message and does not let you save your changes.

For organizations that use Job code default data or Field association: If you make a req field non-editable/read-only, and that field is defaulted automatically by job code defaults or field association, the association is retained but the field displays as read-only.

Workbench does not track changes to these two settings in the audit log.

Reference

Table 2: Settings for making custom fields non-editable/read-only

	Editing a req	Adding a req
Setting	"Non-editable for these user types"	"Extend to add req"

	This setting applies to the process of editing the req.	This setting applies to the process of adding a req.
	When you turn it on by checking the box, it means users of the selected user type(s) cannot change this particular custom field when they are in the process of editing the req to which the custom field belongs.	When you turn it on by checking the box, it means users of the selected user type(s) cannot change this particular field when they are in the process of adding the new req to which the custom field belongs.
If setting is	Unchecked (off)	This setting is automatically off and cannot be turned on when Non-editable for these user types is turned off. You cannot make a custom field non-editable/read-only for the process of adding a req if you have not made it read-only for the process of editing a req.
	Checked (on)	If you make the req non-editable/read-only for the process of editing a req, you can either: ¡ Leave this setting turned off (unchecked) which is the default setting. ¡ Turn this setting on (check it). When it is turned on, the selected user types cannot edit the custom req field when they are adding a req.

Exporting to Excel

The Extend to add req field displays in the column Extend Non-Editable privilege to Add Req as either Yes or No when exporting to Excel.

Add Autofill Fields to Candidate Forms

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Note: The autofill feature applies only to candidate forms completed within KRB. It does not apply to candidate forms, or attachments of forms, completed through Talent Gateways.

For each candidate form, you can configure fields associated work experience records and education records to be automatically populated from the Talent Record:

¡ A maximum of five (5) sets of "Experience" fields ¡ A maximum of three (3) sets of "Education" fields

These fields are in addition to the "most recent start year" and "most recent end year" for employment.

A single record (or row) of work experience has four fields associated with it:

¡ EXPERIENCE.Employer n

¡ EXPERIENCE.Position held n

¡ EXPERIENCE.Start year n

¡ EXPERIENCE.End year n

A single record (or row) of education has 5 fields associated with it:

¡ EDUCATION.Educational Institute n

¡ EDUCATION.Field of study n

¡ EDUCATION.Degree n

¡ EDUCATION.Grad year n

¡ EDUCATION.GPA n

Two additional fields associated with the applicant's profile can be set to auto-populate the corresponding fields on a candidate form:

¡ EXPERIENCE.Start Year (for most recent)

¡ EXPERIENCE.End Year (for most recent)

You must configure each autofill field separately for each candidate form that you wish to have populated automatically from data in the Talent Record.

You should review each candidate form to determine if these autofill fields apply to it and how many experience and education records should be included. Not all candidate forms will require all 5 work experience records and all 3 education records. For example, you may

decide to add autofill fields for only 3 work experience records and 2 education records for a particular candidate form.

Configure an Autofill Field

à To configure one candidate form field to be automatically populated with

data from the corresponding field in the Talent Record, follow these steps:

1. Log in to Workbench.
2. Select Tools > Forms > Candidate forms. The Candidate forms page appears.
3. Locate the form to which you are adding autofill fields in the Candidate forms grid.
4. Click the Administer form fields icon in its row. The Administer form fields page for

    that form appears.

5. Click Add new field in the Actions menu. The Add new field window appears.
6. Complete the information for the new field on the first page of the "Add new field"

    procedure and click Save and continue >>.

7. The Define field attributes window displays.
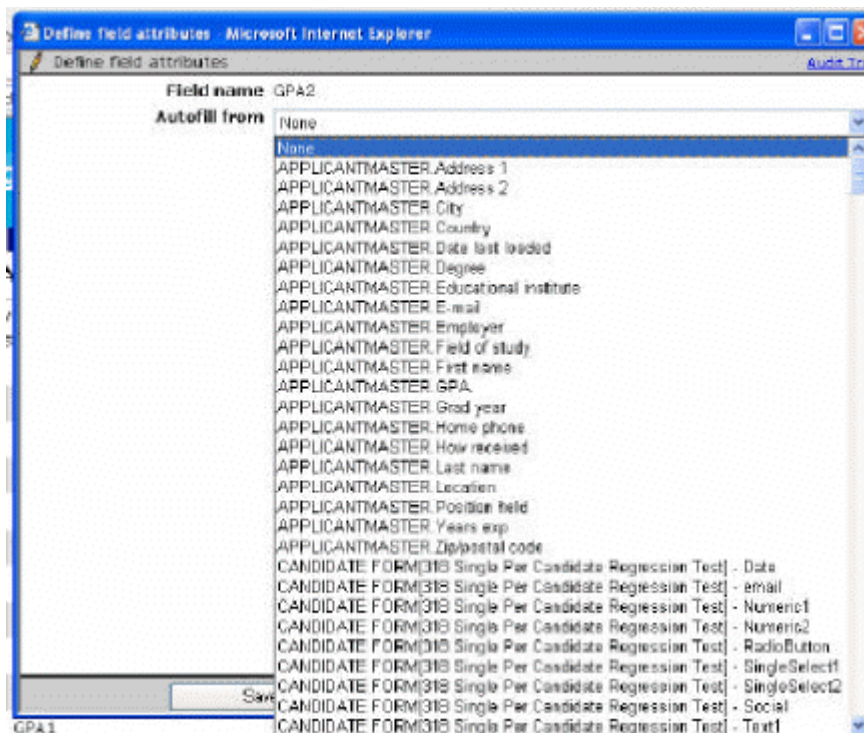
Figure 2: Define field attributes "Autofill from" fields

The Autofill from field is a single-select list of Talent Record fields. It includes:

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Five (5) sets of four (4) work experience fields Three (3) sets of five (5) education fields

Two (2) fields for start year and end year of most recent experience

8. In the Autofill from field, select the field from the dropdown list that corresponds to the new field you are adding. See the list of available autofill fields below.
9. Click Save.
10. Repeat this procedure to set up to all fields that you want to be auto-populated for this

    form.

11. Repeat the entire procedure for another candidate form, if desired.

List of New Configurable Autofill Fields

The following table lists the new autofill fields that will be added in Workbench that will correspond with the current fields available in the Talent Record. Once you have added the new fields, you can view them as output by clicking Preview form in the Actions menu.

Table 3: New configurable autofill fields

#	Label
1	EXPERIENCE.Employer 1
2	EXPERIENCE.Position held 1
3	EXPERIENCE.Start year 1

4	EXPERIENCE.End year 1
5	EXPERIENCE.Employer 2
6	EXPERIENCE.Position held 2
7	EXPERIENCE.Start year 2
8	EXPERIENCE.End year 2
9	EXPERIENCE.Employer 3
10	EXPERIENCE.Position held 3
11	EXPERIENCE.Start year 3
12	EXPERIENCE.End year 3
13	EXPERIENCE.Employer 4
14	EXPERIENCE.Position held 4
15	EXPERIENCE.Start year 4
16	EXPERIENCE.End year 4
17	EXPERIENCE.Employer 5
18	EXPERIENCE.Position held 5

19	EXPERIENCE.Start year 5
20	EXPERIENCE.End year 5
21	EDUCATION.Educational Institute 1
22	EDUCATION.Field of study 1
23	EDUCATION.Degree 1
24	EDUCATION.Grad year 1
25	EDUCATION.GPA 1
26	EDUCATION.Educational Institute 2
27	EDUCATION.Field of study 2
28	EDUCATION.Degree 2
29	EDUCATION.Grad year 2
30	EDUCATION.GPA 2
31	EDUCATION.Educational Institute 3
32	EDUCATION.Field of study 3
33	EDUCATION.Degree 3

34	EDUCATION.Grad year 3
35	EDUCATION.GPA 3
36	EXPERIENCE.Start Year (for most recent)
37	EXPERIENCE.End Year (for most recent)

Administer User Type Preferences

The ability to administer type preferences for user types, available with this release, has different implications for already existing user types (created prior to this release) and newly created user types (created in Workbench 10 and after).

User types created prior to Release 10 still have access to users of all user types by default.

To grant and remove the add user/edit user privileges to user types, you can use the new "Administer type prefererences" feature.

You must administer type preferences for user types in the following circumstances:

¡ For existing user types, to remove their privileges to add/edit the user type field for other

users, if desired. You don't have to change the privileges of your existing user types if you don't want to.

¡ For new user types, to extend their privileges to be able to edit the user type field for other

user types than just their own.

With Release 10, when new user types are added with the "add user/edit user" privileges, that user type is restricted automatically to adding/editing the user type field for only those users who have the same user type. For example, a newly created user type of "Recruiter" will have privileges to add/edit the user type field to "Recruiter" only. Your organization must decide if it wants to selectively expand the access of these new user types to include additional user types in the user type field.

à To configure user type preferences for a user type, follow these steps:

1. Log in to Workbench.
2. Click Tools > Users > User types. The User types page appears.

"User types" Grid: Column Changes

Figure 3: User types grid column changes

3. On the User types grid, find the user type you want to change user type preferences for.

4. Click the Administer type preferences icon for that user type. The Administer type

preferences [User Type] window appears.

The selections in the window are different depending on whether you are creating a brand new user type or changing the settings for an existing user type created prior to Release

10.

Brand new user types: If you are creating a new user type, the Administer type preferences window displays the new user type selected (and all other user types not selected) in the first list box of user types.

The second list box contains the same list of user types minus the new user type. By default, no user types are selected in the second list box.

The third field, "Allow individualsto edit their own user type," is set to No by default.
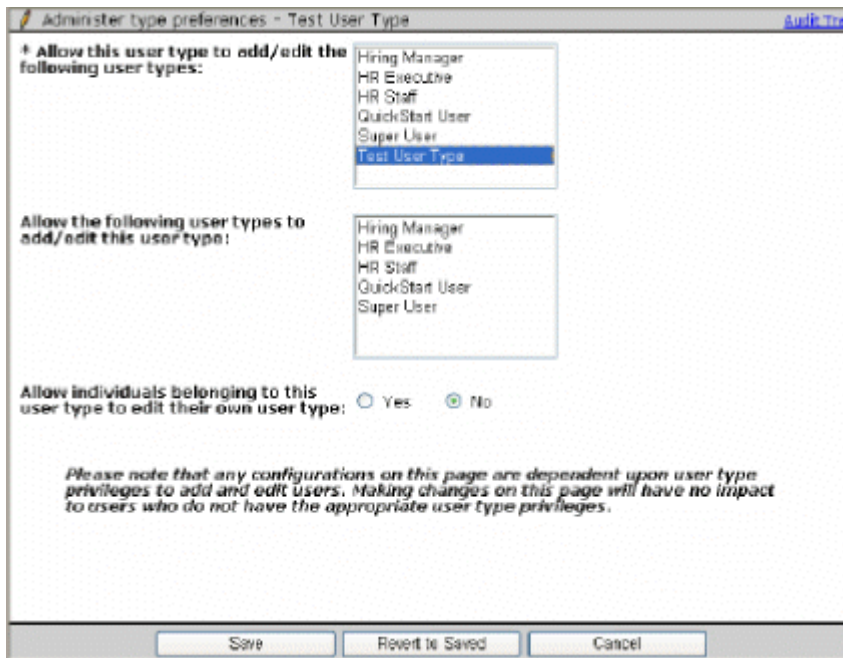
Figure 4: Administer type preferences New User Type

User types created prior to Release 10: If you are administering type

preferences for an existing user type (created prior to this release), the Administer type

preferences window displays all user types selected in both list boxes. The third field,

"Allow individualsto edit their own user type," is set to Yes by default.
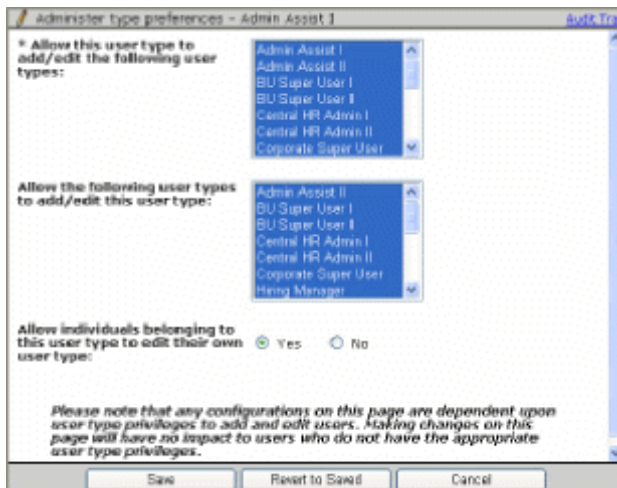
Figure 5: Administer type preferences (prior to this change)

5. Use the table below to select setting for this particular user type.

   Table 4: Administer type preferences fields

Field	Description
*Allow this user type to add / edit the following user types (listed in a multi-select list)	Select one or more user types that this user type can add/edit from the multi-select list box. Defaults: All existing user types (created prior to this change) default to all user types selected. All new user types (created after this change) default to themselves automatically. In other words, if you are configuring this page for the user type "Hiring Manager," than the selection in this list box defaults automatically to "Hiring Manager." You must select at least one user type in order for your changes to be saved. If you attempt to save without selecting one user type, Workbench displays an error message. Important! A user cannot automatically add/edit his/her own user type by virtue of this setting. You, as the Workbench user, have to explicitly configure the user type to allow users add/edit their own user type. See the field "Allow individuals belonging to this user type to edit their own user type" in the last row of this table.
Allow the following user types to add/edit this user type	Select other user types who are allowed to add/edit this user type in KRB, if desired.
Allow individuals belonging to this user type to edit their own user type	Yes Select the "Yes" radio button to allow this user to change his/her own user type. (For example, assume a user has a user type of "Hiring Manager" and has Type permissions to add/edit users of "Hiring Manager" and "Super User" user types. If you select Yes in this field, the user will be able to change her own user type to "Super User," and then if she wants to, back to "Hiring Manager" again.)

Field	Description
	No ü If this field is set to "No" (the default setting), the user: ¡ can change users of the user type(s) which s/he has permissions for ¡ cannot change her/his own user type to a different user type

Effect on Kenexa Recruiter BrassRing users: Your settings on this page affect only those users who have user type privileges to add and edit users in Kenexa Recruiter BrassRing (the "User-Edit" and "User-Add" privileges are turned on).

Users without these two user type privileges can access this page but if they make changes to it, the changes are not saved.

When you or another Workbench user with these two user type privileges makes changes to the settings on this page, those changes do not affect users who do not have the User-Edit and User-Add privileges in KRB.

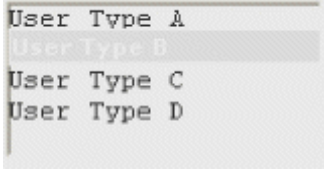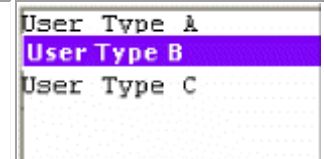Deleted user types: If a User type is deleted, than all preferences for that user type are also deleted.
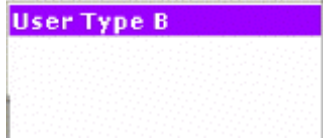
* Required field

6. When you have finished configuring the settings on this page, click Save. Workbench displays a message confirming that your type preference settings are successful and closes the window. Click Cancel to close page without saving changes. Click Revert to Saved to undo changes.

User Type / Type Preference Settings Combinations

The table below describes different combinations of Type preference settings for a user type with add/edit user privileges.

Table 5: User type preferences scenarios
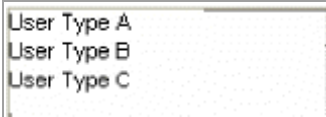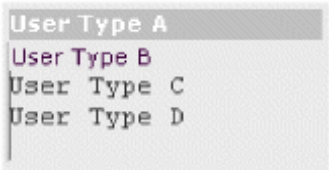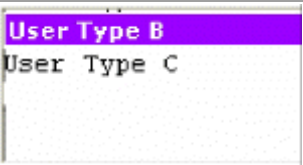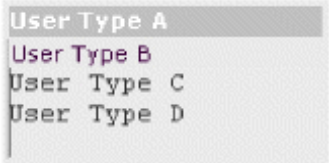
Scenario	"User type" field	Behavior
The user belongs to User Type A and has the user privilege 'Users Edit', but is attempting to edit a user belonging to a user type s/he does NOT have permission to edit (User Type B). The user has the user privilege 'Users edit' and is attempting to edit a user belonging to a user type s/he DOES have permission to edit.	User Type A User Type B User Type C User Type D User Type A **User Type B** User Type C	On the Edit user page in KRB, the user sees the User type field with all users types listed, and the user type pre-selected for the user s/he is attempting to edit. This field is visible but disabled, including any scrollbars. The user can see but cannot edit this field in this scenario. The user can edit other fields on this page. On the Edit user page in KRB, the user type field reflects the user type for the user being edited. The other user types which are visible are those user types which this user has permission to edit.

The user has the user privilege 'Users edit' but can edit only one user type	User Type B	The User type field is active in KRB. The user type available for editing appears in the list box; no other user types appear.
The user is adding a new user.		The User type field on the Add user page in KRB displays only the user types this user has permission to edit. None are pre-selected.

Specific Examples

The client has set up User Types A, B, C and D. User Type A has permission to edit User Types B and C, but not D.

Table 6: User type preferences scenarios, specific examples

User Type A
User Type B
User Type C

Scenario	User type Field	Behavior
The user tries to edit another user belonging to User Type A.	User Type A User Type B User Type C User Type D	The User type field is disabled, including scrollbars. The field displays all user types. User Type A is pre-selected.
The user tries to edit a user belonging to User Type B	User Type B User Type C	The User type field is active. The field displays only those user types for which this user has permission to edit. User Type B is pre-selected.
The user is tries to edit himself but does not have permission to edit his own user type.	User Type A User Type B User Type C User Type D	The User type field is disabled when this user opens his own record to edit it. The field displays all user types. The user's user type is highlighted. The user can take no action on this field.

|				
The user tries to edit herself and does have permission to edit her own user type.				The User type field is active. The user's own user type (User Type A) displays and is automatically pre-selected; the user types available for edit (User Types B and C) display. The user can change her own user type to any of the available types (A,B, and C)
User Type A User Type B User Type C				
The user tries to edit a user type he does not have access to (B). The user does have permission to edit his own user type.		The User type field is active. It displays only those user types that are available for editing. Even though the user has access to edit his own user type (User Type A), his user type does not display in the User type field for selection unless he is changing his own user type.		

View Users and Type Details

To view user and user type details, select Workbench > Tools > Users > User types > View users and type details. The View [User Type] window appears. You cannot edit this page.

You can see user type privileges functional areas to do with candidates, requisitions, searching, reports, and so forth; and you can see user type.

User Type B
User Type C

Talent Gateways

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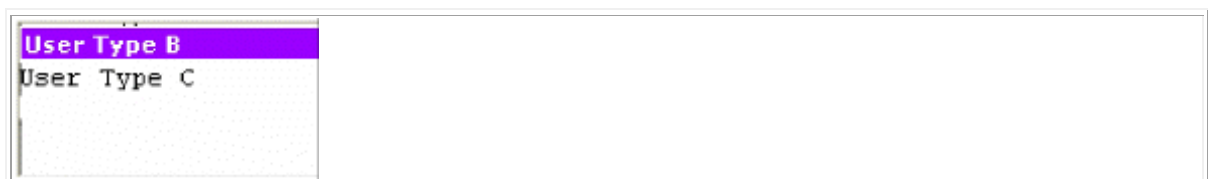
Configure Instructions for Add Candidate/Contact Gateway

Note: These instructions apply specifically to the new "Add candidate/contact" gateway, available with Release 10. Kenexa must configure the Add candidate/contact Gateway for your organization before you can make these customizations.

You can add user instructions to the Add Candidate/Contact list page from the Instructions menu.

For multi-language sites, instructions display by default in the user's login language. If that is not available, instructions display in your organization's base language. If base language cannot be determined, then no instructions are displayed.

Users can access the Add Candidate/Contact Gateways listing page from the Add candidate menu.

à To add user instructions for the Add Candidate/Contact Gateways listing

page, follow these steps:

1. Log in to Workbench.
2. In Workbench, select Tools > Settings > Instructions > Add Candidate/contact list page
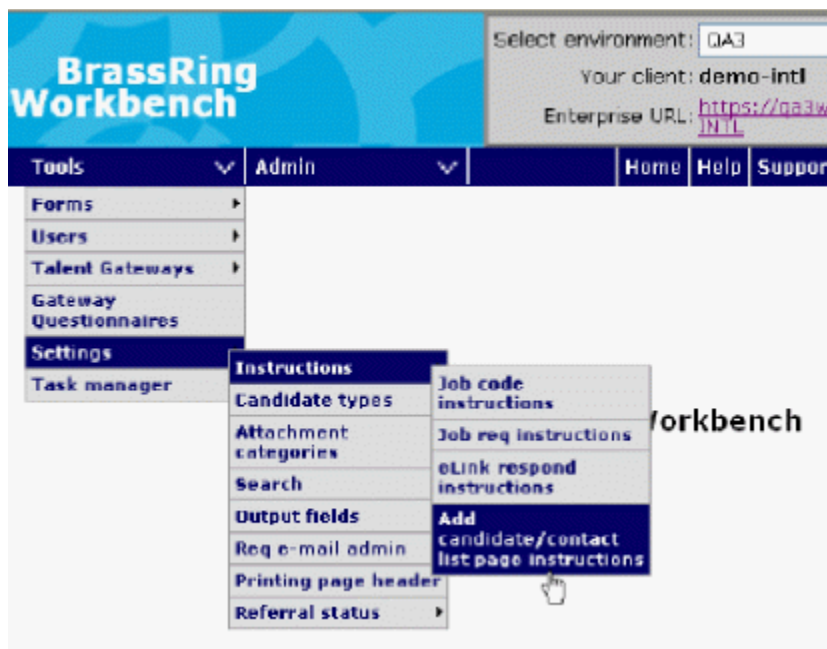
   instructions.

Figure 6: "Add candidate/contact list page instructions" menu item

The Add Candidate/Contact list page Instructions page appears. You can use the default instructions or customize the message for your users.

Figure 7: Add candidate/contact "Instructions" page

3. Enter instructions to the user in the Add Candidate/Contact TG list page instruction text area, if desired. You can enter up to 4000 characters (including HTML tags).

   These instructions appear at the top of the Add Candidate/Contact Gateways listing page in KRB. The listing page is available when your organization has created more than one Add Candidate/Contact Talent Gateway.

4. Click Preview to see how the message will look to your KRB users.
5. Click Set to default to reinstate the default system message at any time. The default

   message is: "The available Add Candidate and Add Contact site options are listed below. To select a gateway click the launch icon."

6. When you are finished, click Save. Or, click Revert to saved to go back to the last message you saved in the system. Click Cancel to close the window without any changes.

Configure Error Messages for Job Submission Limits

This feature consists of two parts: configuring job submission limits and configuring error messages to display to candidates explaining those limits. Kenexa must first enable the job submission limits feature in order for the message text to be active.

The two configured limits are:

¡ A limit on the number of jobs to which the candidate can apply in one submission.

¡ A limit on the total number of jobs to which the candidate can apply in a specified period of

time.

You can configure three error messages to display to candidates explaining each type of job submission limit:

¡	A message informing the candidate that s/he has reached the maximum number of job applications allowed in one submission (Maximum concurrent req submissions error message).
¡	A message informing the candidate that s/he has reached the maximum number of job submissions for a specified period of time (Maximum total submissions exceeded error message).
¡	A message informing the candidate that his/her current submission of multiple reqs will exceed the maximum total submissions available to him/her, but a smaller number of reqs would be allowed (Reduce current submission to avoid exceeding maximum error message).

You can edit these settings at any time. Changing these settings:	
¡	Affects all future submissions.
¡	Does not affect past submissions (submissions made prior to the change in settings).
¡	Affects submissions in progress depending on where the candidate's submission is in the process of system checks that are associated with these settings. If the submission already passed the point where the system checks kick in, the candidate's submission is not affected.

Configuring Error Messages

You can configure error messages to accompany the configured submission limits in the Talent Gateways text Customizations interface on the Notifications tab, or you can use the default messages.

Table 7: Error messages for submission limits

Field	Description
Maximum concurrent req submissions error message	You can configure the message that is displayed when the candidate attempts to apply to more than the permitted number of jobs in a single job submission, or you can use the default message. The default message is: "The maximum number of jobs that can be selected for a single submission is # maximum_concurrent_req_submissions# This message goes with the Maximum concurrent req submissions setting enabled by Kenexa. # maximum_concurrent_req_submissions# is a token that pulls a value from the Maximum concurrent req submissions setting.
	If you configure a custom message, you can include or delete the embedded token: #maximum_concurrent_req_submissions#
Maximum total submissions exceeded error message	You can configure the message that is displayed when the candidate has already submitted the maximum total submissions available per candidate, or you can use the default message.

	The default message is: "You have previously applied to the maximum number of jobs allowed at this time." This message goes with the Maximum total req submissions per period setting enabled by Kenexa. Best practice recommendation: Kenexa recommends that you inform applicants at the point in time at which new job submissions will be allowed (if it will be allowed). For example, if the Period for maximum submissions is set to 90 Days back, the message could state, "You have previously applied to the maximum number of jobs allowed at this time. Please try again in 90 days." Best practice recommendation: Kenexa recommends that you use other available configurable text messages to inform the candidate about the submission limit before the candidate attempts to make a submission.
Reduce current submission to avoid exceeding maximum error message	You can configure the message that is displayed when the candidate's current submission of multiple reqs would exceed the maximum total submissions available to him, but a smaller number of reqs would be allowed, or you can use the default message. The default message is: "Applying to this set of jobs will exceed the maximum total job submissions allowed at this time. Please reduce your selection to #number_of_remaining_submissions#." # number_of_remaining_submissions# is a token value calculated as follows: [("Maximum total req submissions per period value") (Total candidate submissions within the "period for maximum submissions" value)] Best practice recommendation: Kenexa recommends that you include in this configured message the point in time at which additional submissions will be allowed (if they will be allowed). Best practice recommendation: Kenexa recommends that you use other available configurable text messages to inform the candidate about the submission limit before the candidate attempts to make a submission. If desired, you can change the message to text. You can include

	or delete the embedded token: #number_of_remaining_submissions#

à To configure the Notifications tab settings for submission limits, follow

these steps:

1. Log in to Workbench..

2. Select Tools > Talent Gateways > Text customizations. The Customizations interface displays.
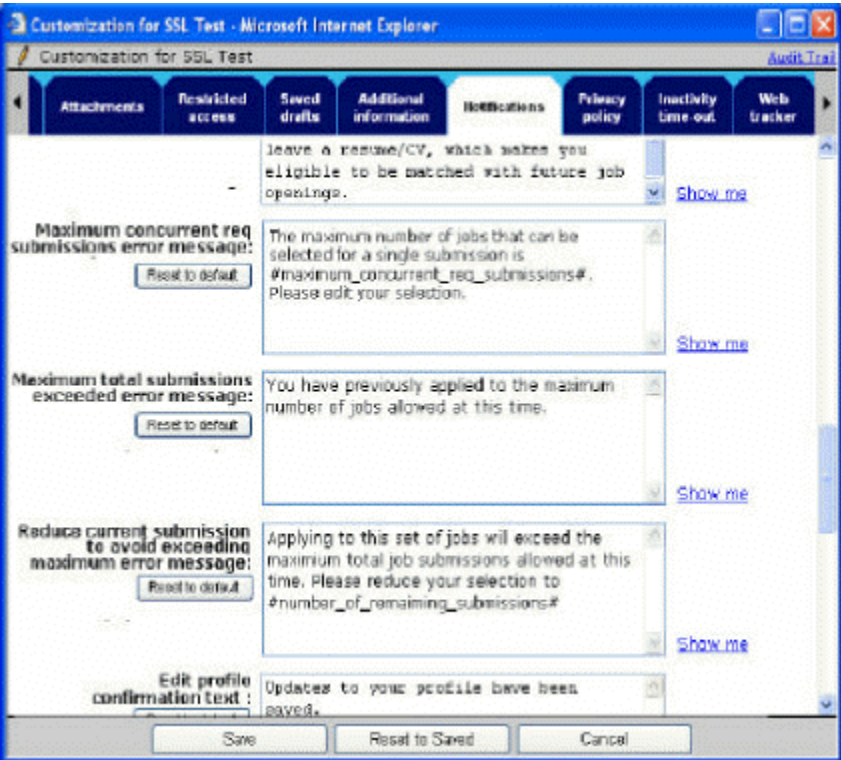3. Select the Notifications tab.

Figure 8: Submission limits error messages

4. Scroll to the settings described in Error! Reference source not found. (below Zero search message text).
5. Configure each error message. Follow the best practice recommendations in Table 7.
6. Click Save when you have finished.

Customize "Additional Info" Text

This section describes how to configure the "Additional Information" section for a Full Talent Gateway.

à To configure additional information text for a Full Talent Gateway, follow

these steps:

1. Log in to Workbench.
2. Select Tools > Talent Gateways > Text customization. The Customization page

   appears.

3. Scroll to and select the Additional information tab.
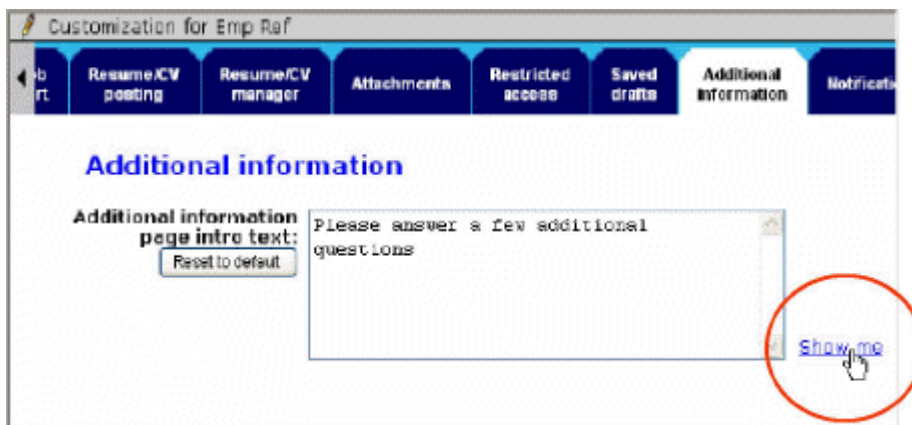
Figure 9: Customization: Additional information Tab

4. Enter text into the Additional information page intro text text box. You can enter
   up to 4000 characters, including HTML tags, in the text area.

   You can leave the text area blank. If you leave it blank, no introductory text
   appears at the top of the Additional information page.

   The default text for this field is: "Please answer a few additional questions." You
   can restore the default text by clicking the Reset to default button at any time.

5. Click Show me to display the customized version of the introductory text as it will
   appear to the candidate on the Additional information page on the Talent Gateway.
   The Show me window displays:
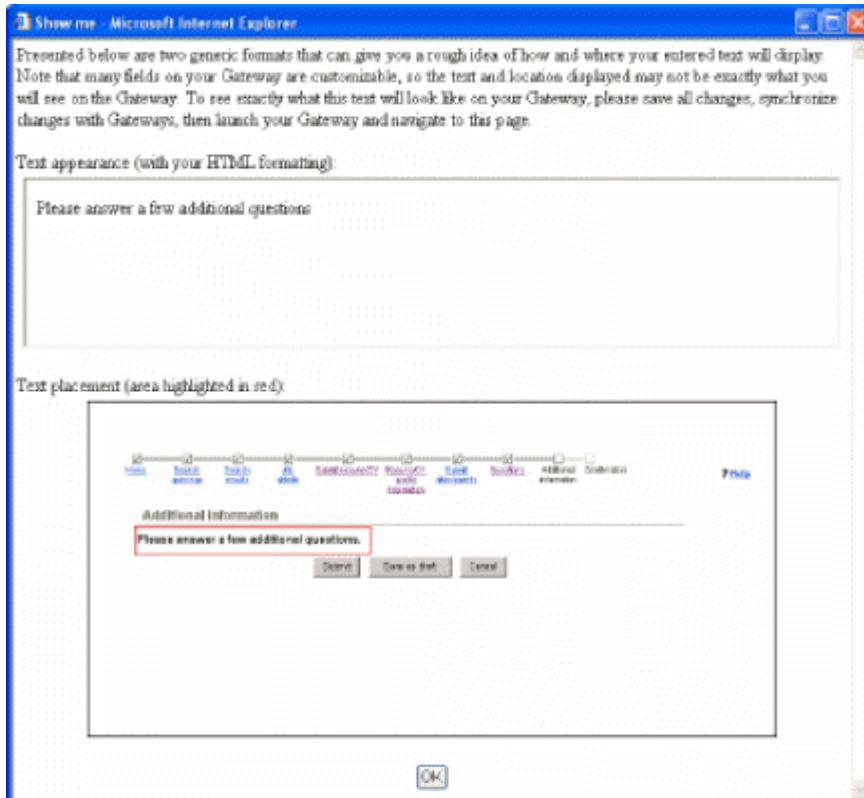
Figure 10: "Show me" window

6. Click OK to close the Show me window.
7. Back on the Additional information tab, click Save when you have entering the

   "additional information" text or HTML. You can also save your changes as a draft
   and finish them later.

Gateway Questionnaire

Configure Custom GQ labels

The GQ feature must be turned on by Kenexa. Once it is turned on:

¡ You can add or edit the GQ display label for each data field pulled from a form as long as it
is

a widget of the "Question" type.

¡ You can define a different display label for the same GQ data field in each language
available

for the GQ.

When this feature is turned on, you should be aware of how the "regular" default GQ label
and the corresponding custom labels interact under different circumstances:

¡ An empty custom label never overwrites the existing default label for any type of question.

This means that the default label displays if a custom label has been created but was left empty.

¡ If a custom label was created in a particular language, the browser uses that custom label even

if the default label for the same language is empty. (The browser makes the most user-friendly choice.)

¡ Users of each application see the same labels for the Gateway Questionnaire in the Talent

Gateway and in Kenexa Recruiter BrassRing when viewing candidate applications.

Populating GQ Label Fields

You define one or several GQ display labels for individual widgets that belong to the Gateway Questionnaire.

There are four types of widgets: Question, Text, Graphic, and Resume. You can configure substitute display labels for widgets of the "Question" type.

You have three choices for how to populate the GQ display label fields. You can:

¡ Leave the field blank, which is the default value. The form label displays.

¡ Pull the form label to be the GQ display label, or to use it as a starting point for editing that

label.

¡ Enter text manually in the label field; this text becomes the label.

Field options are not customizable: You cannot customize options associated with fields to which you have applied custom labels. An example of options are the items in a list box from which the candidate selects an answer. Each option retains its original value for display.

Best practice recommendation: Kenexa strongly recommends you use GQ labels to change only the style of the question and not the meaning of it, because candidate answers are associated with the original form labels provided by default in Kenexa Recruiter BrassRing.

Adding Custom Labels to a GQ Widget

You can use GQ custom labels for widgets of the Question type.

If the feature is turned on and you have not defined custom labels, the Gateway Questionnaire displays the original form field label.

Custom labels are associated with a particular widget and not to its source. If you change the widget to another type of question, the custom label does not change unless you clear it or reset it to source labels.

If you changes the question label, the custom label does not change with it unless you edit it from the widget edit page.

If you change a question and the corresponding custom label is empty, the new question label overwrites the empty custom label.

à To add custom labels to one, some, or all of your existing Question type

widgets, follow these steps:

1. Log in to Workbench.
2. Select Tools > Gateway Questionnaires. The Gateway Questionnaires page

    displays.

3. Find the Gateway Questionnaire you want to add custom labels to in the grid.
4. Click its Administer sections/pages icon. The Section & page list page displays. It

    lists each page and/or section added to this GQ. Under each page or section, it lists the associated widgets.

    Widgets are different types of meaningful objects included in the Gateway Questionnaire. They can be of four types: Question, Text, Graphic, or Resume.

    You can customize labels for widgets of the Question type.

5. To see what types of widgets are on a specific page or in a specific section, click the Administer widgets icon. The Administer widgets page displays.

    Note: Widgets of the Question type display the question icon

    question text.

6. To add a custom label (one language) or several custom labels (multiple languages), double-click the Question widget you want to change.
7. The Widget properties window opens for that question. You can edit it. You have two choices for adding a custom label:

    Click Load label from other source.

    Enter up to 255 characters into the text box. You can use plain text, Unicode

    characters, or HTML. Note: If you use HTML, the HTML tags are included in the character count of 255 characters.

To expand the custom label text entry area for additional languages, click the plus sign + to the left of the Custom label box.
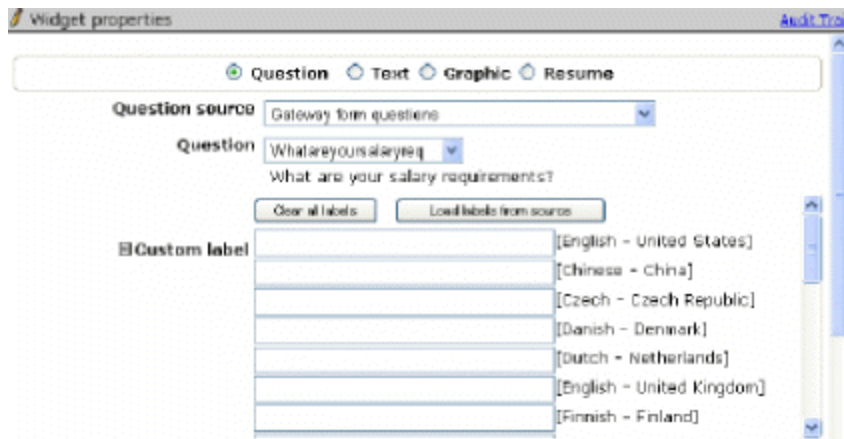

Figure 11: Edit expanded custom labels for Widgets

To contract the Custom label field, click the minus sign () to the left of the Custom label box.

8. Edit other widget properties if desired.
9. When you have finished, click Save to save your changes.

If you change your mind before saving the changes you made in this session, click Revert to saved to restore the last saved configuration. Click Cancel to close the window without making any changes.

Viewing Widget Properties

To see the configured custom labels for a Question widget, click the View icon for the widget you want to see in the Administer widgets page.

Workbench Status Check Block TG Forms and Employee Referral

Overview

This document describes the Workbench configuration steps for three features in the Kenexa Recruiter BrassRing 10, 10.1, and 10.2 releases:

¡ Status Check (available in Release 10 on August 11, 2007). Please see page 4.

¡ Block Creation of TG Form with Blank Fields (available in Release 10.1 on August 31,

2007). Please see page 4.

¡ Employee Referral System (available in Release 10.2 on September 21, 2007). Please see

page 16.

Status Check

Your organization can enable Status Check for candidates and referring employees alone or along with the enablement of a dedicated Referral gateway. Once Status Check is enabled, you can customize text and configure the other settings described below.

Configuration Steps for Status Check

This section describes the configuration steps and the configurable settings available to Certified Workbench Users in Workbench for this feature. The configuration steps for the Status Check feature are:

¡ Customize text for the Landing logged in tab.

¡ Customize text for the Status check tab:

"Job/Referral text"

Column header text

Job submission withdrawal/re-activation confirmation message.

Note: You can customize and configure the above items in any order.

Landing Logged in Tab

à To customize text related to Status Check for candidates or for referring employees as part of an

Employee Referral System on the Landing logged in tab, follow these steps:

1. Log in to Workbench.
2. Select Tools > Talent Gateways > Text customization. The Customization page appears.
3. Select the Landing logged in tab.
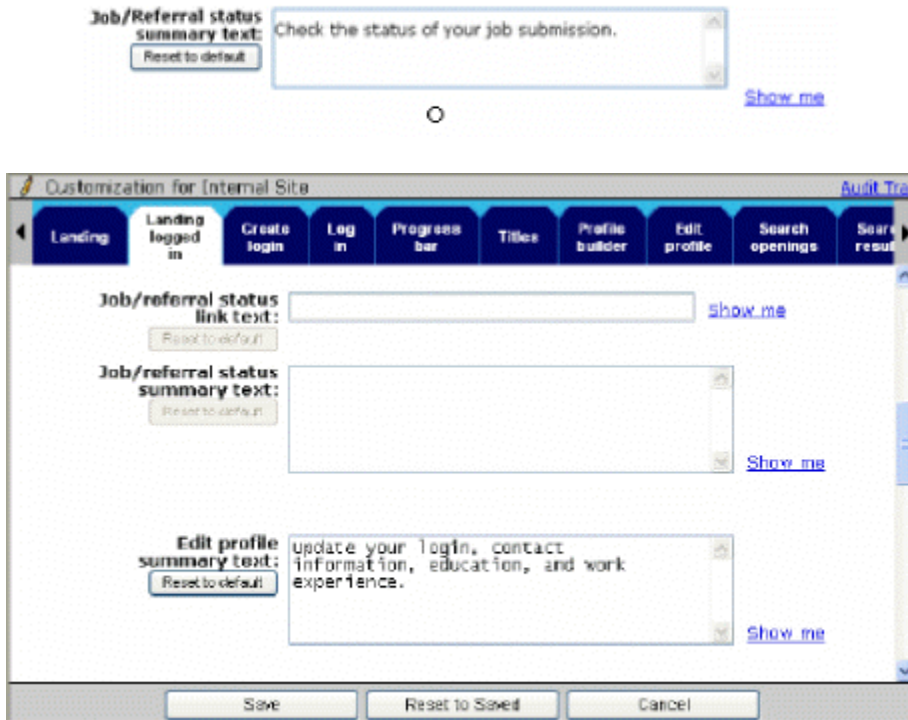
Figure 1: Landing logged in tab "Job/referral status" fields

4. Configure the "Job/referral status" text fields on this tab as desired.
5. Click Save to save your changes. Click Reset to default at any time to restore the default

message text.

Table 1: Landing logged in tab "Job/referral status" fields

Field	Candi-dates	Emp. Ref.	Text/ HTML	Max. # Chars.	Default text
Job/referral status link text	ü	ü	Text only	75	Talent Gateway: The default label on a regular, Platinum-level Talent Gateway for Candidate status check is: "Job submission

					status.” Referral Gateway: “Referral status.”
Job/referral status summary text	ü	ü	ü	200	Talent Gateway: “Check the status of your job submission.” Referral Gateway: “Check the status of your referral.”

Status Check Tab

Your organization can enable Status Check for candidates and referring employees alone or along with the enablement of a dedicated Referral gateway. Once one or both are enabled, you can customize some or all of the messages related to Status check on the Status check tab of the text Customization page if desired. See the configuration steps below and the screen capture on page 7 for more information.

Candidates check the status of their job bids and referring employees check the status of their referrals on the appropriate pages.

à To customize text messages on the Status check tab, follow these steps:

1. Log in to Workbench.
2. Select Tools > Talent Gateways > Text customization. The Customization page appears.
3. Scroll to and select the Status check tab. See an example of this tab on page 7.
4. Configure the following types of text on this page:

   “Job/referral status” page title and intro text. See Table 2 for more information.

   Column header text for any of the fields on this page as desired. See page 8 for more information.

5. After you have finished, click Save to save your changes. Alternatively, click Reset to default at any time to restore the default message text.

Figure 2: Text Customization Status check tab

For both referral and non-referral gateways

For non-referral gateways only

For referral gateways only

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Job/Referral Status Text

Table 2: Status check tab Job/referral status text

Field	Candi-dates	Emp. Ref.	Text/ HTML	Max. # Chars.	Default text
Job/referral status page title	ü	ü	ü	75	Talent Gateway: "Job submission status" Referral Gateway: "Referral status"
Job/referral status intro text	ü	ü	ü	600	Talent Gateway: "Check the status of your job submission. You can withdraw or reactivate your job submission only when the job is "Open" or "On-hold" and when no one is being considered for the position. If you choose to withdraw or re-activate your job submission, your request will be processed and the updated information will be available at a later time." Referral Gateway: "Check the status of your referral."
Display on Gateway					This box is checked by default.

Configure Column Header Text

Candidate Status Check

Certified Workbench Users can configure the column titles for candidates, who will then be able to view and sort the configured titles. Job bid status information displays for one year after the final HR status is assigned.

ú Job requisition ID

ú Job submission date

ú Job title

ú Job status

ú Job status date

ú HR status

ú HR status date

ú Withdraw/reactivate

ú Job submission withdrawal reactivation message text

Referral Status Check

Certified Workbench Users can configure the column titles for referring employees, who will then be able to view and sort the configured titles. Job referral status information displays indefinitely after a final HR status is assigned.

ú Referral submission date

ú Job requisition ID

ú Job title

ú Referral name

ú Referral status

ú Referral status description

ú Referral start date

Job submission withdrawal/re-activation confirmation message

Configure the Job submission withdrawal/re-activation confirmation message if necessary. This is the message the candidate sees upon withdrawing/re-activating their job submission. It supports a maximum of 500 characters of text and/or HTML. The default message is, "Your request is being processed. Please check later for the updated information."

Table 3: Status check tab Configurable column header fields and message text

Field	Candidates see it	Ref. Emps. see it	Text/ HTML	Max. # Chars.	Default text
Non-Referral Talent Gateways only					
Job title column header text	ü		ü	50	"Job title"
Job requisition ID column header text	ü		ü	50	"Job requisition ID"
Job submission date column header text	ü		ü	50	"Job submission date"
Job status column header text	ü		ü	50	"Job status"

Job status date column header text	ü		ü	50	"Job status date"
HR status column header text	ü		ü	50	"HR status"
HR status date column header text	ü		ü	50	"HR status date"
Withdraw/re-activate column header text	ü		ü	50	"Withdraw/re-activate"
Job submission withdrawal/re-activation confirmation message	ü		ü	500	"Your request is being processed. Please check later for the updated information."

Referral Talent Gateways only

Referral name column header text	ü	ü	50	"Referral name"
Referral submission date column header text	ü	ü	50	"Referral submission date"
Referral start date column header text	ü	ü	50	"Referral start date"
Referral status column header text	ü	ü	50	"Referral status"
Referral status description column header text	ü	ü	50	"Referral status description"

Block Creation of TG Forms with Blank Fields

When a candidate completes a submission and the Talent Gateway creates and attaches a form to the candidate's Talent Record, it creates the impression that the form is complete, even when some or all of the fields in the form are blank.

In certain circumstances, forms with blank data elements are undesirable, especially for sensitive data such as EEO information, which recruiters cannot require that the candidate provide. In addition, KRB users may be blocked, due to user privileges appropriate to sensitive data, from opening a form to determine whether the form is complete or not.

Your organization can control whether a specific form is created if selected form fields have not been completed by the candidate by using the new settings: Required for form creation from TG and Create form from TG. These settings can be used for any form fields that are not already required (either by the system or by your organization). These settings do not affect form fields that are already designated as "required" under any circumstances; required form fields must be completed, either by the candidate or through auto-population, for the form to be created and the candidate's data to be submitted.

By contrast, these new settings allow you to specify that one or more optional form fields must be completed by the candidate before the TG will create the form. These settings impose additional requirements for the completion of the form before the TG will create the form.

If you turn this setting on for some (or even one) optional field on a candidate form that is presented automatically to the candidate, the candidate can still submit his/her information through the gateway. However, depending on how stringent your settings are (as described on page 13), the Talent Gateway will not create the form and does not attach it to the candidate's Talent Record.

The Talent Gateway assumes that the candidate has left the fields blank that are designated as Required for form creation from TG when:

¡ No field with this setting turned on contains a default or auto-populated value.

¡ The candidate did not add any characters of any kind to the field.

Known Limitations

These settings apply only to the creation of a candidate form from the Talent Gateway application workflow; they do not affect the creation of a form within Kenexa Recruiter BrassRing or via an eLink.

This functionality applies only to manual form creation, and does not apply to integrations.

Implementation Decisions

You can review the optional fields on your existing form fields and decide which, if any, fields must be filled out by the candidate or else there is no point in having the form created by the Talent Gateway. You would also consider this when creating new optional form fields.

You do not have to change this setting at all. If you leave it set to No (the default), the Talent Gateway creates the form associated with a particular field, just as it has done in the past.

If your organization is currently experiencing the creation of blank or incomplete forms that are attached to Talent Records and you would like to restrict forms from being created unless certain fields are completed without making them actually "required" to the candidate, consider the following:

¡ Decide which fields on the form should determine if a form is created.

¡ Decide if the criteria for form creation is if ANY one of the specified fields is completed, or if

EVERY one of the specified fields are completed.

To use this feature, follow the steps in the next two sections.

Implementation Steps

To use these settings, follow these steps:

1. Decide for each form which optional field(s) on that form, if any, should be filled out by the candidate

    before the form is created by the Talent Gateway.

2. Enable the setting Required for form creation from TG for the field(s) you have decided upon in step 1. You can enable this attribute for one field, two fields, or several fields per form. See the next section for details. Note: If you enable it for more than one field per form, you must also configure the second setting, Create form from TG.
3. If you have enabled Required for form creation from TG for more than one field on a given form as described in the previous step, configure the Create form from TG setting for that form. This setting indicates whether all the Required for form creation from TG fields must be filled out for the form to be created, or only some of them. See page 13 for details.

Enable "Required for form creation from TG"

Note: The setting Required for form creation from TG replaces Required for form creation in the Edit field attributes window with Release 10.

This setting is irrelevant for form fields that are already designated as "required" fields. The user interface checks that required fields are filled in before evaluating this field setting to determine whether the form should be saved.

This setting applies to the field in all languages in which it appears on the form.

This setting is irrelevant when a form is posted on a language Gateway associated with a language for which the field is hidden. The form-creation process does not check this field setting and the associated form setting when the field is hidden.

à To enable this setting for a specific form field, follow these steps:

1. Log in to Workbench.
2. Select Tools > Forms > Candidate forms. The Candidate forms page displays.
3. Find the form which has the optional field(s) you want to enable this setting for in the grid.
4. Click the Administer form fields icon in the row for that form. The Administer form

    fields page displays.

5. Locate the field that you want to make required for form creation from the Talent Gateway and click the Edit field attributes icon in its row. The Define field attributes window displays for that field.
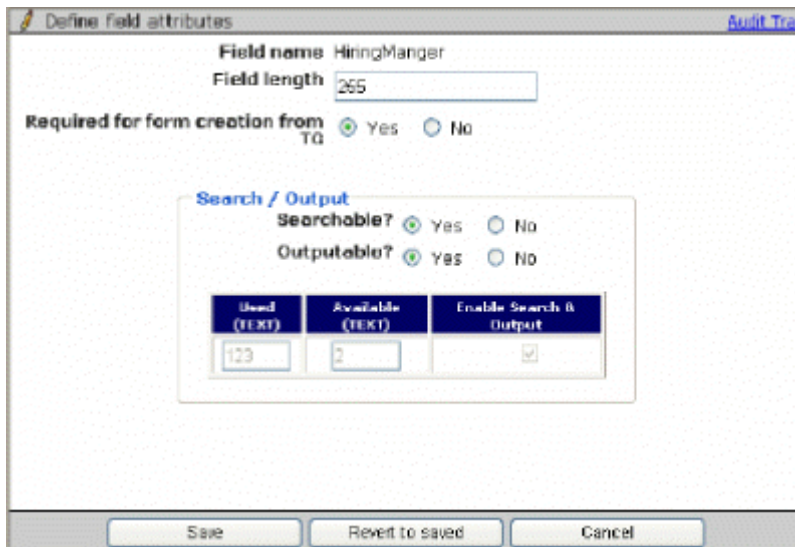
Figure 3: Required for form creation from TG

6. Set the field Required for form creation from TG to Yes.

   Yes: If set to Yes, the form might be created when the candidate fills in this optional field. It

   depends on your setting for Create form from TG. See "Configure the "Create form from TG" Setting" on page 13 for more information.

   No: If set to No (the default setting), the form is created no matter what the candidate fills in.

   (This is the default behavior and the way it worked in past releases. The system automatically retains this setting.)

7. Click Save.

Configure the "Create form from TG" Setting

The purpose of this setting is to specify the rule for when the Talent Gateway should not create a form if you enable the Required for form creation from TG setting for more than one optional field per form.
(Note: If you enabled Required for form creation from TG for just one field and no other fields, then the form is not created if that one field is not filled in by the candidate, regardless of anything else that is filled in.)

If the candidate encounters a form on the Talent Gateway which has the Required for form creation from TG setting turned on for more than one field, the Create form from TG setting tells the Talent Gateway under what circumstances it should create the form.

Assuming you have already decided that you do not want the form to be created unless the candidate fills in certain optional fields on the form, the question you must answer is, "What

is the minimum amount of information we need to get from the candidate that justifies the creation of this form and its attachment to the candidate's Talent Record?"

Do you need every optional field with the "Required for form creation from TG" setting to be filled out? In this case, the Talent Gateway would create the form only when the candidate fills out all the optional fields with that setting turned on, the more stringent setting. This is the default setting.

Alternatively, can you accept a situation where any "Required for form creation from TG" field is filled out (in this case, the form would be partially filled out with optional data you want; this is the less stringent setting).

Note: The setting "IGNORE all the 'Required for form creation from TG' field settings." is for Talent Gateway and Basic Talent Gateway forms.
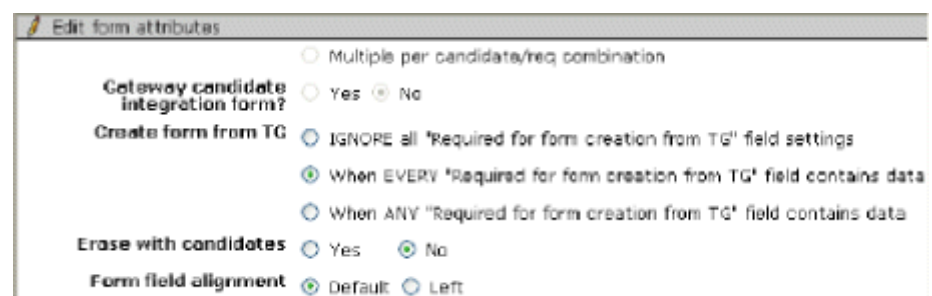
à To select a setting for Create form from TG, follow these steps:

1. Log in to Workbench.
2. Select Tools > Forms > Candidate forms. The Candidate forms page displays.
3. Locate the form whose fields you want to modify in the grid.
4. Click the Edit form attributes icon in the row for that form. The Edit form attributes

   window displays.

5. Scroll the the Create form from TG setting.

   Figure 4: Edit form attributes Create form from TG setting

6.
7. Select the radio button for the preferred setting:

   IGNORE all 'Required for form creation from TG' field settings. When you select this

   setting, the TG ignores the configuration of the Required for form creation from TG setting entirely, and works according to pre-existing functionality, either creating or not creating the form.

EVERY "Required for form creation from TG" field contains data. (This is the default

value.) If you select this option, the form is created only if every field with the Required for form creation from TG setting turned on is filled in by the candidate.

ANY "Required for form creation from TG" field contains data. If you select this option,

the form is created if any field with the Required for form creation from TG setting turned on is filled in by the candidate.

8. Click Save when you are finished.

How the "Create form from TG" Settings Work

This setting has an impact only when a candidate encounters this form on the TG and the form has more than one field for which the setting Required for form creation from TG is configured to be Yes.

¡ If the candidate enters data for none of the Required for form creation from TG fields (leaves

all of them blank), the form is not instantiated in the candidate's Talent Record, regardless of how this option is configured

¡ If the candidate enters data for all of the Required for form creation from TG fields, the form

is instantiated in the candidate's Talent Record, regardless of how this option is configured ¡ If the candidate enters data for some of the Required for form creation from TG (leaves some

blank), the form is instantiated only if this setting is configured to be ANY.

The "IGNORE" Option

If the "IGNORE" option is selected, the Talent Gateway ignores the configuration of the Required for form creation from TG setting entirely, creating or not creating the form according to pre-existing functionality.

This option is used automatically for any Talent Gateway form or Basic Talent Gateway form. If the user tries to save a Talent Gateway or Basic Talent Gateway form and this setting is configured to be one of the other two options ("EVERY" or "ANY"), the setting is automatically saved as the "IGNORE" option.

The "EVERY" and "ANY" Options

You can apply the "EVERY" and "ANY" option only to candidate forms that are not Talent Gateway forms or Basic Talent Gateway forms.

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These two options have an impact only if at least one field on the form has the setting Required for form creation from TG configured to be YES. For both options:

¡ If the candidate enters data for none of the Required for form creation from TG fields (leaves

them blank), the form is not instantiated in the candidate's Talent Record

¡ If the candidate enters data for all of the Required for form creation from TG fields, the form

is not instantiated in the candidate's Talent Record

¡ If more than one field is configured "YES" for the field setting, and the candidate enters data

for some of the Required for form creation from TG fields and leaves some of them blank, whether or not the form is instantiated depends on which option of this setting is selected.

Employee Referral System

This section describes the configurable settings available to Certified Workbench Users in Workbench for the Employee Referral System. This functionality must be enabled by Kenexa before these settings are available to you. There are additional configuration settings that must also be configured by Kenexa. See KRB R10 Release Notes Employee Referral System for more details.

Configuration Steps for the Employee Referral System

The major steps for configuring the Employee Referral System are:

1. Configure Referral status descriptions.
2. Configure Referral status user type privileges.
3. Customize Referral Gateway text:

   Customize text on the Employee referral tab.

   Customized text on the Notification tab.

   Customize text on the Resume/CV tab.

Working with Referral Statuses

A new menu item has been added to the Tools > Settings menu called Referral statuses. The Referral status menu has two sub-menus:

¡ Referral status descriptions which links to the Administer referral status

descriptions page. These are descriptions that populate a list and two columns on the user interface in KRB and Talent Gateways. See page 16 for more information.

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¡ Referral status admin which links to the Administer referral statuses page. There are

six (6) predefined default employee referral statuses. Note: You cannot add new employee referral statuses. You can customize their labels and set attributes for them. See page 22 below for more information.

Referral Status Descriptions

You can configure Referral status descriptions. Users can see Referral status descriptions in the following locations:

¡ A select list option on the Referral status update page ¡ In an output column on the Referral status tab on the Talent Record in KRB ¡ As a Status check column on the Talent Gateway

Users can select one of the referral status descriptions (configured by Certified Workbench Users or Kenexa) at the time of updating the referral status to provide additional information as to why the status was selected. For instance, a user selects the "Disapproved" referral status and selects "duplicate submission" as a referral status description.

Configure Customized Referral Status Descriptions

You can configure Referral status descriptions to be used in conjunction with the Referral status. The user can select from the configured Referral status descriptions that appear on the user interface, thereby providing additional information as to why the particular referral status was chosen. For example: Disapproved duplicate submission.

à To configure customized labels for Referral statuses, follow these steps:

1. Log in to Workbench.
2. Select Tools > Settings > Referral status > Referral status descriptions. The Administer

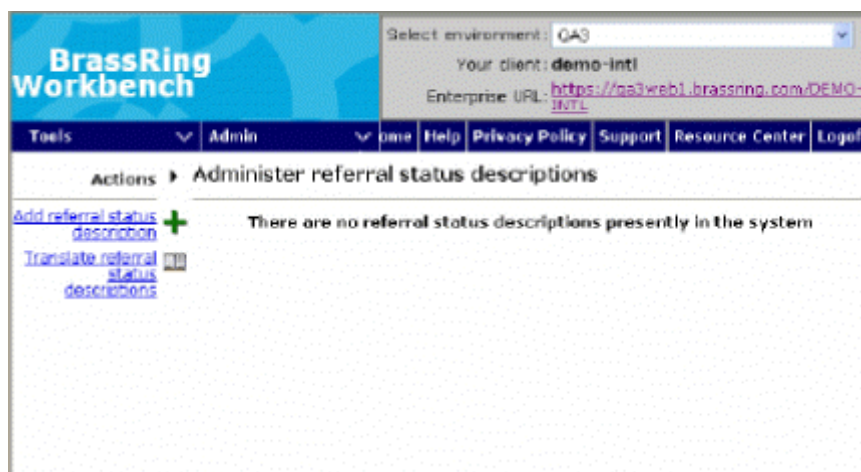   referral status descriptions page displays.

Figure 5: Administer referral status descriptions first time

Figure 6: Administer referral status descriptions after adding descriptions

3. Click Add referral status description in the Actions menu. The Add referral status description window pops up.
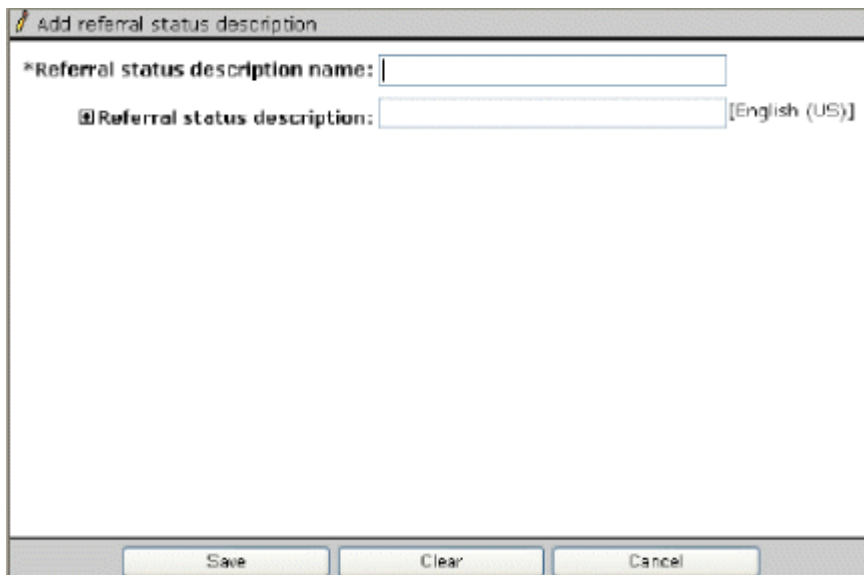

Figure 7: Add referral status description window

4. Enter the Referral status description name.
5. Enter the Referral status description in your base language. To add descriptions for additional

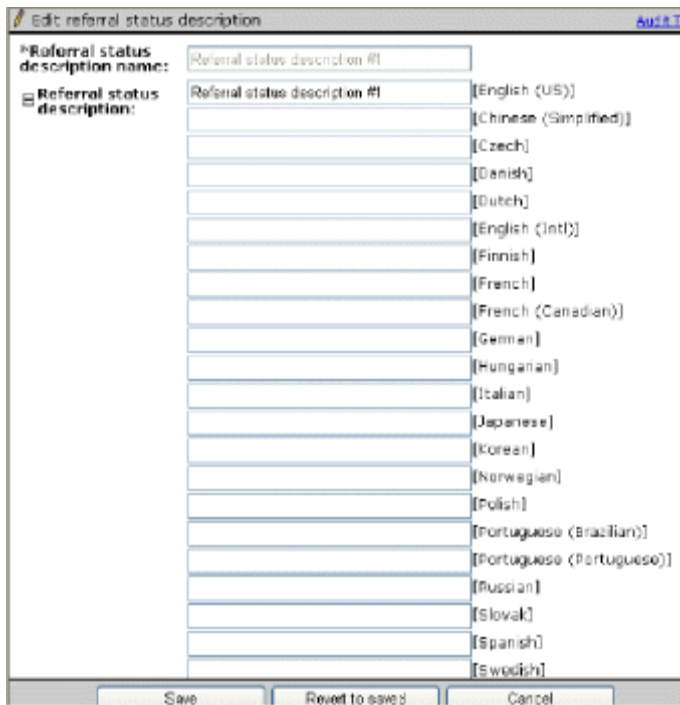   languages, click the plus sign + beside Referral status description to expand it the window.

Figure 8: Edit referral status description -- expanded

6. Enter the translated text into the text box for each locale.
7. When you are finished, click Save.

8. The Referral status description is added to the grid on the Administer referral status descriptions page.

Edit Referral Status Description Name

à To edit a referral status description name, follow these steps:

1. Log in to Workbench.
2. Select Tools > Settings > Referral status > Referral status descriptions. The Administer

   referral status descriptions page displays.

3. Find the Referral status description name that you want to change in the listing grid and click the Edit icon. The Edit referral status description window pops up.
4. Change the Referral status description name and its translated value as desired.
5. When you are finished, click Save. The changed Referral status description name is listed on the

   listing grid.

View Referral Status Description Details

à To view the details for a referral status description, follow these steps:

1. Log in to Workbench.
2. Select Tools > Settings > Referral status > Referral status descriptions. The Administer

   referral status descriptions page displays.

3. Find the Referral status description name that you want to view in the listing grid and click the View icon. The View referral status description window pops up.
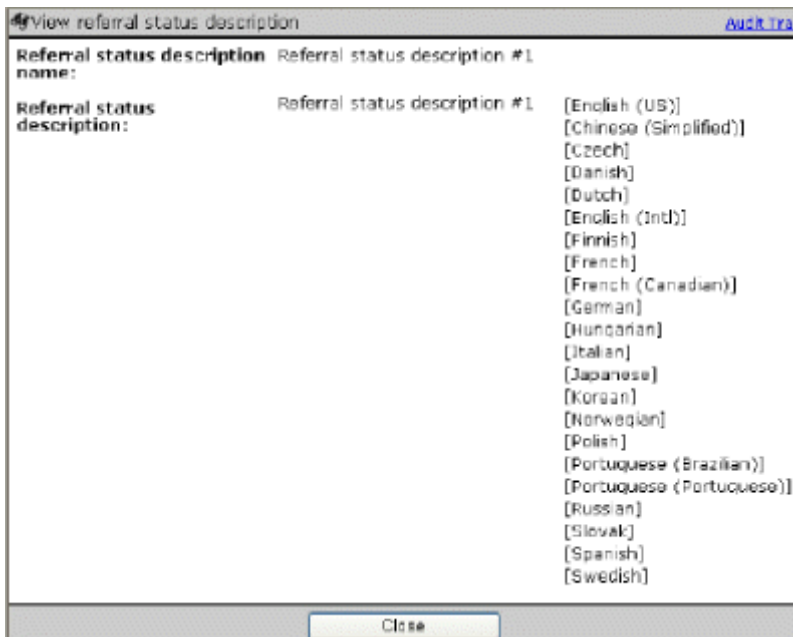4. When you are finished, click Close.

Figure 9: View referral status description

Delete a Referral Status Description

à To delete a referral status description, follow these steps:

1. Log in to Workbench.
2. Select Tools > Settings > Referral status > Referral status descriptions. The Administer

   referral status descriptions page displays.

3. Find the Referral status description that you want to delete in the listing grid and click the Delete icon.
4. A confirmation window pops up asking you to confirm the deletion. Click OK something to confirm the deletion.
5. The confirmation message window closes. The Referral status description row is removed from the listing grid.

Referral Status Administration

You can view, edit, activate and inactivate Referral statuses and perform some translations on this page.

à To administer referral statuses, follow these steps:

1. Log in to Workbench.
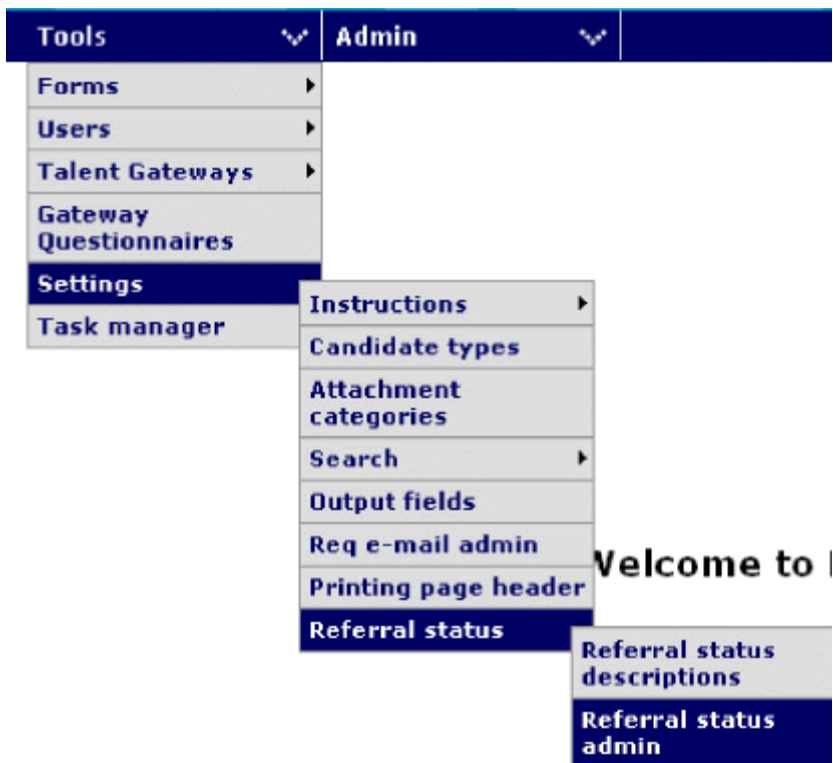2. Select Tools > Settings > Referral status > Referral status admin

Figure 10: "Referral status admin" menu item

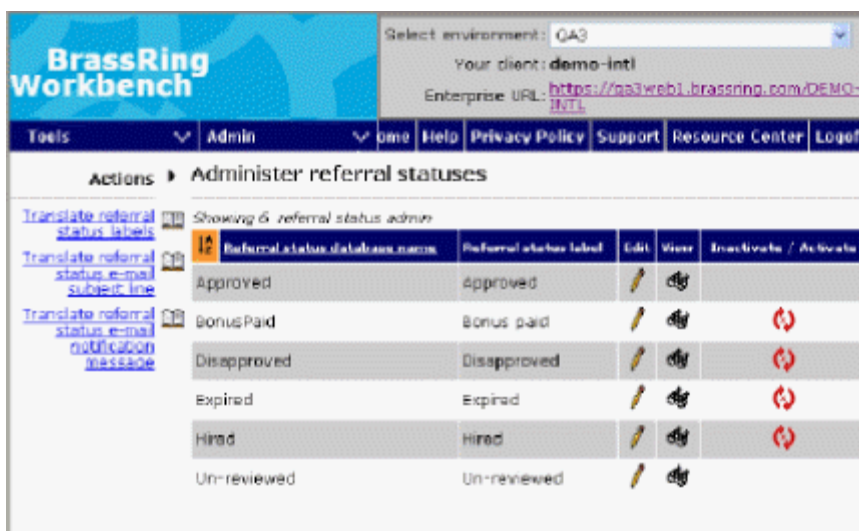3. The Administer referral statuses page opens.

Figure 11: Administer referral statuses

From the Administer referral statuses grid, you can:

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¡ View and sort the list of Referral status database names and Referral status labels for the six standard referral statuses.

¡ Edit individual Referral status labels.

¡ Inactivate / Activate individual Referral statuses.

¡ Sort on the Referral status database name in ascending or descending order.

Table 4: Administer referral statuses grid

Field	Description
Referral status database name	The standard referral status database names: Approved, Bonus paid, Disapproved, Expired, Hired, Un-reviewed.
Referral status label	The configured referral status label for your organization's base locale. The Referral status database name is the default setting for this field.
Inactivate/Activate	This column contains the standard Activate icon for Inactive referral statuses, and the standard Inactivate icon for Active referral statuses.
Approved and Un-reviewed	You cannot inactivate these referral statuses. If you inactivate Hired or Expired referral statuses, all automatic update business rules are ignored.

From the Actions menu on this page you can:

¡ Translate referral status labels

¡ Translate referral status e-mail subject line

¡ Translate referral status e-mail notification message

If you click on one of the translation links, the Workbench standard bulk translation page displays for that item.

Edit Attributes for Referral Statuses

The Employee Referral System has five system-supplied referral statuses: Approved, Un-reviewed, Disapproved, Expired, and Bonus Paid. You can configure several attributes for each system-supplied referral status including the label.

à To configure these attributes for one or more referral statuses, follow these steps:

1. Log in to Workbench.
2. Select Settings > Referral status > Referral status admin.
3. The Administer referral statuses page displays.

Figure 12: Administer referral statuses grid

4. Click the Edit icon for the referral status you want to edit. The Edit referral status window opens for that referral status, as shown in Figure 13 below. See the table at the end of this section for information about each field.
5. Click Save when you have finished configuring these settings.

Figure 13: Edit referral status window

Use the table below to guide you in configuring referral statuses.

Table 5: Edit referral status fields, all statuses

Field	Description

Referral status database name	You cannot edit this field. The standard database name is grayed out.
Referral status label	This field is used to configure the referral status for display in the KRB and Talent Gateway user interfaces. It is limited to100 characters. The default value for this field is the Referral status database name for all locales of the client's purchased languages, including informal locales. If your organization purchases additional languages, the translation icon + displays next to the Referral status label, along with the locales of the purchased languages. Translations are always required and can not be deleted.
Display active referral icon when candidate is in this referral status	Select Yes if you would like the Employee referral icon to display withiin KRB for candidates who are in this referral status. The default setting for this field is No.
Retain referral status with new submission when candidate is currently in this	The default setting for this field is No. Select Yes if you want the referral status not to change to Un-reviewed when the same employee submits the same candidate again AND the candidate is in the selected referral status. The referral status remains as the selected status.

status	When this field is set to No, the referral status changes to Un-reviewed on new submissions when the candidate is in the selected referral status.
Send e-mail communication to referrer when candidate is updated to this status	The default setting for this field is No, meaning that no e-mail is sent to the referrer upon the candidates referral status being updated to this current status. If you set this field to Yes, the system sends an e-mail to the referring employee when the candidate's referral status is updated to this current status. If the field is changed from Yes to No, KRB ignores the Referral status email subject line and Referral status email notification message fields but retains already existing translations.
Referral status e-mail subject line	You can enter an e-mail subject line alerting the recipient to a change in referral status. The field has a limit of 500 characters. It accepts the following referred candidate tokens: #Contact-Info:FirstName#,

	#Contact-Info:LastName# and referring employee tokens: #EmpRef:FirstName# and #EmpRef:LastName# The text in this text box field is inserted as the subject line of the e-mail sent to the referrer upon the candidate being updated to this referral status. If the Send email communication to referrer when candidate is updated to this status field is set to Yes, you must enter the base language value for this field. KRB ignores the text in this field for all languages if the Send email communication to referrer when candidate is updated to this status field is set to No. This field is still configurable in Workbench when the Send email communication to referrer when candidate is updated to this status field is set to No. If the client is international, the standard translation icon + displays next to the Referral status, along with the languages of their purchased locales.
Referral status e-mail notification message	You can enter an e-mail message notifying the referring employee of a change in the status of the referral. The field has a limit of 4000 characters. The field accepts text and HTML and the following referred candidate tokens: #Contact-Info:FirstName#, #Contact-Info:LastName# and referring employee tokens: #EmpRef:FirstName# and #EmpRef:LastName# The text within this field is inserted as the body of the message sent to the referrer upon the candidate being updated to this referral status (as an overnight process). If the Send email communication to referrer when candidate is updated to this status field is set to Yes, you must enter the base language value for this field. KRB ignores the text in this field for all languages if the Send email communication to referrer when candidate is updated to this status field is set to No. This field is still configurable in Workbench when the Send email communication to referrer when candidate is updated to this status field is set to No. If your organization purchases additional languages, you will see the translation icon (+) next to the Referral status, along with the languages of their

	purchased locales.

Do not send e-mail notification	This field is not selected by default and displays only for the Hired referral status.
when HR status action date which triggers the Hired referral status update is added to the value from the 'Set days from "Action date" for the "Hired" referral status trigger and the result is less than today's date	If Send email communication to referrer when candidate is updated to this status is set to No, this field is disabled. If you check this field, the system never sends an e-mail notification when the referral status is updated to Hired in instances where the HR status action date which triggers the Hired referral status update is added to the value from the 'Set days from "Action date" for the "Hired" referral status trigger to occur (0-365)' and the result is less than today's date. This system always sends e-mail notification for manual updates to Hired: The system always sends an e-mail for manual updates to Hired regardless of this setting. When the checkbox is not checked, the system always sends an e-mail notification when the referral status is updated to Hired.
Referral status update type	This is a single select list box which displays only for the Un-reviewed, Hired, and Expired statuses. This setting determines if the referral status can be updated manually (by a system user only), automatically (by the system only), or both. If the referral status is set for a manual or both update, the referral status label with a radio button displays on the Update referral status page in KRB. If the referral status is set to Automatic only, the referral status label with radio button does not display on the Update referral status page in KRB. You cannot set the Manual only option to the Un-reviewed referral status. You cannot set Expired referral status to the Automatic only and Automatic and Manual options if the Referral rights expiration client setting is set to N/A. If the setting: 'Set days from "Action date" for the "Hired" referral status trigger to occur (0-365)' Set withdraw/Action date status setting is set to

	N/A or
	blank, the Automatic only and Automatic and Manual options do not display for
	Referral status update type Automatic only ▾
	the Hired referral status.

Un-reviewed, Hired, and Expired Statuses

Table 6: Field defaults

Status	Default Behavior
Un-reviewed	Defaults to Automatic only.
Hired	Defaults to Automatic only unless the 'Set days from "Action date" for the "Hired" referral status trigger to occur (0-365)' setting on the Set withdraw/Action date status page is set to N/A or is blank, then it defaults to Manual only.

Expired	Defaults to Automatic and Manual unless the Referral rights expiration client setting is set to N/A, then it defaults to Manual only.

View Referral Status

To view the attributes of a referral status, click the View icon for the status you want to view.

Referral Status User Type Privileges

The current user privilege Referral status view/update on the Candidate Actions 2 privileges page has been split into two user type privileges: Referral status update and Referral status view.

¡ The Referral status view user privilege controls the ability of the user to view the Talent

Record referral tab for candidates.

¡ The Referral status update user privilege controls the ability of the user to update the

referral status of referral candidates.

Note:

If Referral status update is selected, Referral status view is automatically selected

and grays out.

If Referral status update is de-selected, Referral status view becomes enabled and
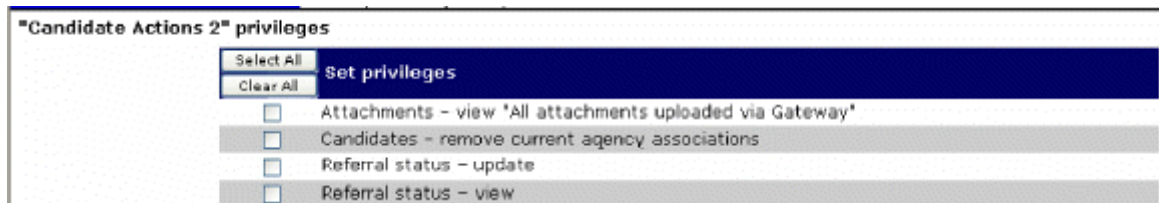remains selected.

Figure 14: Referral status "update" and "view" privileges

Customize Referral Gateway Text

Certified Workbench Users or Kenexa can customize Referral Gateway text on the following
tabs:

¡ Landing logged in tab

¡ Employee referral tab

¡ Notifications tab

¡ Resume/CV posting tab

à To customize Gateway text, follow these steps:

1. Log in to Workbench.
2. Select Tools > Talent Gateways > Text customization. The Customization page
   appears.

3. Scroll to and select the tab containing the text you want to customize.

Employee Referral Tab

à To customize text messages on the Employee referral tab, follow these steps:

1. Log in to Workbench.
2. Select Tools > Talent Gateways > Text customization. The Customization page
   appears.
3. Scroll to and select the Employee referral tab.
4. Configure the text for the fields below. See the sections immediately following for
   more

   information about these fields:

   Referring employee profile page title

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Referring employee profile page intro text

5. Click Save to save your changes. Click Reset to default at any time to restore the default message text.
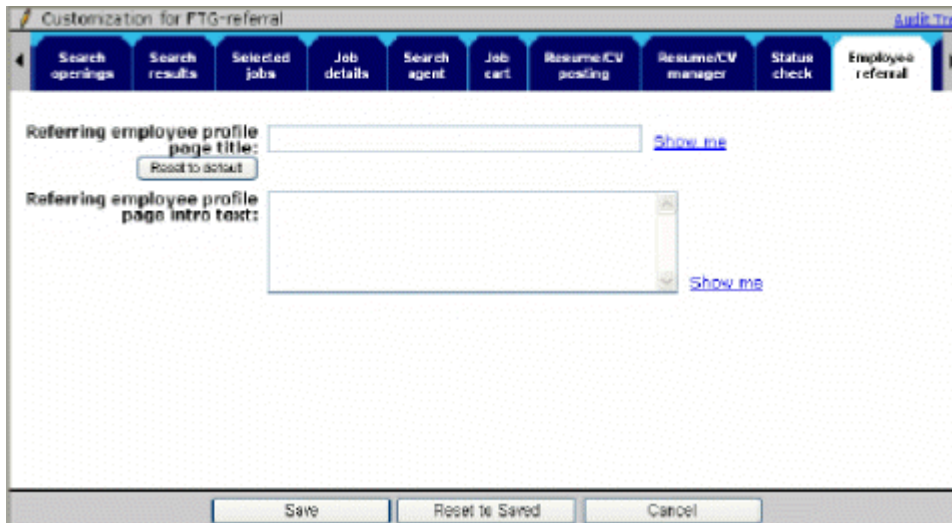

Figure 15:Gateway customization Employee referral tab

Table 7: Employee referal tab Referring employee profile page fields

Field	Employees See this	Text/ HTML	Max. # Chars.	Default Text
Referring employee profile page title	ü	Text	200	The default label is Employee profile. This default text is used on the TG if this field is blank or null.
Referring employee profile page intro text	ü	ü	4000	The default setting is no text.

Referring Employee Profile Page Text

You can customize text for the Referring employee profile page title and the Referring employee profile page intro text.
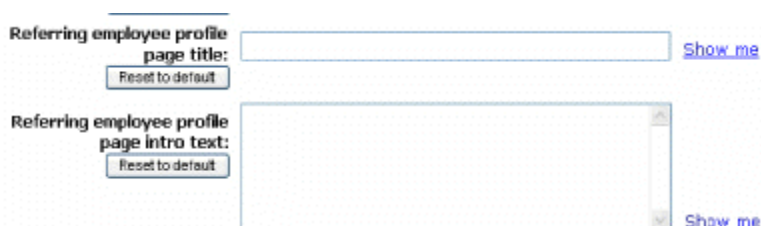

Figure 16: Referring employee profile page customizable text fields

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Table 8: Referring employee profile page text

Field	Emp. Ref.	Text/ HTML	Max. # Chars.	Default text
Referring employee profile page title	ü	Text	200	The text entered in this field displays above the profile fields on the Employee profile page for Referral Gateways. The default value for this field is "Employee profile." If the field is left blank, no page title displays on the Employee profile page.
Referring employee profile page intro text	ü	ü	4000	The text entered in this field displays above the profile fields on the Employee profile page for Referral Gateways. If the field is left blank, no introductory text displays on the Employee profile page

Notifications Tab

à To customize text messages on the Notifications tab, follow these steps:

1. Log in to Workbench.
2. Select Tools > Talent Gateways > Text customization. The Customization page appears.
3. Scroll to and select the Notifications tab.
4. Configure the text for the fields below. See the table immediately following for more information

   about these fields:

Referred candidate e-mail notification message

Referred candidate eLink error message

Referred candidate eLink submission confirmation message Referral decline privacy policy email subject line
 Referral decline privacy policy email message

Referral expired submission email subject line

Referral expired submission email message

5. Click Save to save your changes. Click Reset to default at any time to restore the default message text.

Table 9: Customizable text for Employee Referral, Notifications tab

Field	Field Type	Text/ HTML	Max. # Chars.	Default text
Referred candidate e-mail notification message	Text area	ü	500	This is the message contained within the referred candidate eLink sent to the referred candidate after the employee completes his or her portion of the referral submission. Tokens accepted: [FIRSTNAME], [LASTNAME], [REFERRERFIRSTNAME], [REFERRERLASTNAME], [REFERREDTOJOBSMSG], [JOBSAPPLIED], [QUESTIONSLINKSTART], [QUESTIONSLINKEND] Enter text for CLIENT TG URL HERE The default text is: "Hi [FIRSTNAME] [LASTNAME], [REFERRERFIRSTNAME] [REFERRERLASTNAME] has referred you for employment at our organization. [REFERREDTOJOBSMSG] [JOBSAPPLIED] Please click [QUESTIONSLINKSTART] here [QUESTIONSLINKEND] to answer a few questions. To view more openings please visit us at CLIENT TG URL HERE"
Referred candidate eLink error message	Text area	ü	500	This error message displays to the referred candidate if the submission flow is set to Questions/Forms and there are no questions configured to display for the Gateway. The default text is, "There are currently no questions to display." If the field is left blank, the default value is inserted as the message.
Referred candidate eLink submission confirmation message	Text area	ü	500	This confirmation message displays to the referred candidate once they complete their portion of the referral submission. The default text is, "Thank you for your submission." If the field is left blank, the default value is inserted as the message.

Referral decline privacy policy email subject line	Text	Text only	200	The text within this field in inserted as the body of the message sent to the referrer upon the referred candidate declining the privacy policy. The candidate tokens: #Contact-Info:FirstName# and #Contact-Info:LastName#. "Referral submission invalid." If the field is left blank, the default value is inserted as the subject line of the message.
Referral decline privacy policy email message	Text area	ü	4000	The text within this field in inserted as the body of the message sent to the referrer upon the referred candidate declining the privacy policy. The field accepts the candidate tokens: #Contact-Info:FirstName# and #Contact-Info:LastName#. The default text for this field is: "The candidate you referred has declined the privacy policy consent. Your referral submission is no longer valid." If the field is left blank, the default value is inserted as the body of the message
Referral expired submission email subject line	Text	ü	200	The text within this field is inserted as the subject line for the message sent to the referrer upon the referred candidate expiring their submission. The field accepts the candidate tokens: #Contact-Info:FirstName# and #Contact-Info:LastName#. The default text for this field is "Referral submission invalid."
Referral expired submission email message	Text area	ü	4000	The text within this field is inserted as the body of the message sent to the referrer upon the referred candidate expiring their submission. The field accepts the candidate tokens: #Contact-Info:FirstName# and #Contact-Info:LastName#. The default text for this field is: "There has been no action taken by the candidate you have referred. Your referral

			submission is no longer valid." If the field is left blank, the default value is inserted as the body of the message.

Resume/CV Tab

à To customize text messages on the Resume/CV tab, follow these steps:

1. Log in to Workbench.
2. Select Tools > Talent Gateways > Text customization. The Customization page appears.

3. Scroll to and select the Resume/CV tab.
4. Configure the text for the fields below. See the sections immediately following for more

   information about these fields:

   Upload resume/CV from computer Radio Button Text Enter resume/CV by typing or copying it Radio Button Text

5. Click Save to save your changes. Click Reset to default at any time to restore the default message text.

Table 10: Customized text for Employee Referrals, Resume/CV tab

.Field	Field Type	Text/ HTML	Max. # Chars.	Default text
Upload my resume/CV from computer	Text	ü	200	This field controls the text which displays for the radio button "Upload my resume/CV from my computer" on the Submit/resume CV page. The default text for this field is "Upload my resume/CV from my computer".
Enter resume/CV by typing or copying it	Text area	ü	200	This field controls the text which displays for the radio button "Enter my resume/CV by typing or copying it in" on the Submit/resume CV page. The default for this field is "Enter my resume/CV by typing or copying it in."