

KenexaRecruiter® BrassRing

Product Update Guide

Release 11.0

FINAL

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Agency Manager Enhancements

With Release 11, you will see extensive improvements to Agency Managers functionality and usability. Agency Manager users can:

- Limit access of Agency contacts to Agencies by User type.
- Limit access of Agency contacts to Agencies by Org group membership.
- Allow the Agency to work previously posted jobs until they are closed or un-posted for other reasons, while not allowing new postings, when an Agency contract has expired.
- Search for Agencies on the TG Options page rather than having to scroll through hundreds of contacts.
- Search on agency specialization from the TG options page.
- Jump to the Agency contact information page from any candidate grid in the system to view candidate ownership, retention period, fees, specialization, and so forth.
- Receive automatic e-mail notification when a posting sent to the Agency contact is removed (manually or automatically).
- Create a personal list of agencies (View my agencies).
- Add feedback about an Agency in the Agency notes field of the Agency output column
- Make ownership of the candidate at the Agency level rather than the Contact level.
- Allow Agency contacts to submit multiple candidates to a single job through an Agency portal by enabling a configurable Workbench setting.
- Transfer ownership to current Agency contacts without re-setting the clock.

Benefits

These enhancements improve Agency contacts' workflow and efficiency.

Visible Changes

There are visible changes associated with this project:

The Select Agency access page:

- has three new fields: My agencies, Search for agencies, and Filter by specialization.
- has a new option to send an e-mail notification to the Agent upon the posting.
- links to a new Search Agency page.

- has a new button, **Administer my agencies**, which opens the **Administer My Agencies** page.

The **Add agency code** and **Edit agency code** pages have two new fields: **Display as posting option for Org group(s)** and **Allow new postings even if Agreement expiration date has elapsed**.

The **Add agency contact** and **Edit agency contact** pages have a new field: **Display as posting option for User type**.

The **Agency icon** which displays for active **Agency candidates** in the **Agency referral column** on all candidate output grids links to a new **Agency contact information** page.

The **Agency contact information** page displays the **Agency history/ Current agency table** and **Agency contact communications table**. These same grids appear on the **Agency** tab of the **Talent Record**.

The **Deactivate selected contacts** grid has a new column, **Transfer candidate referral rights**. It links to the new **Transfer agency contact** page.

The **submission confirmation** window has a new **Submit next candidate** button.

Cost

There is no additional cost associated with this feature.

Limitations and Known Interactions

None

Best Practice Recommendations

None

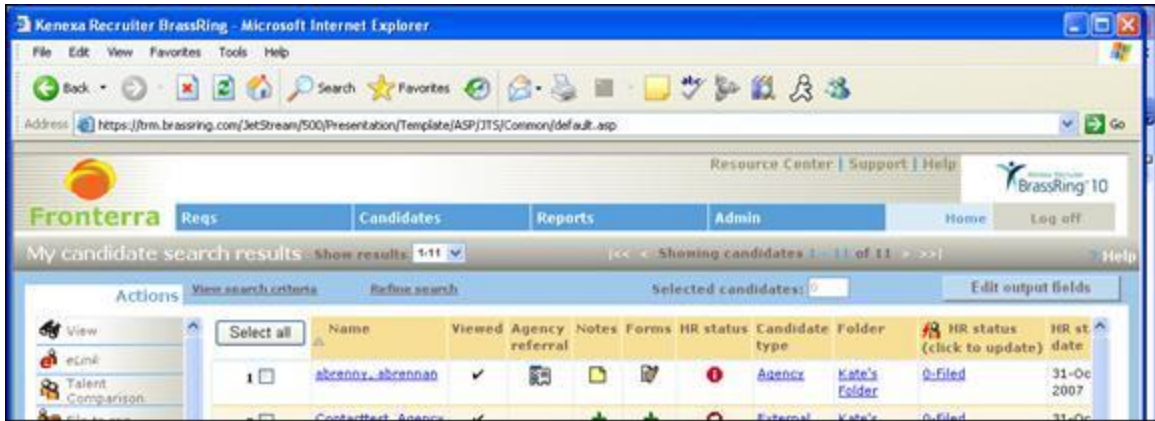
Overview of Implementation

Please see the individual sections for information about how each feature is implemented.

KRB User Experience

Candidate Output Grids: Agency Referral Link is Live

With Release 11, the **Agency icon** which displays for active **Agency candidates** in the **Agency referral column** on all candidate output grids links to the new **Agency contact information** page. The **Agency contact information** page is identical to the **Agency history / Current agency table** in the candidate's **Talent Record**.



Agency Contact Information Page Update

Note: The “Agency history/ Current agency” and “Agency contact communications” grids display the same information as the information displayed on the candidate’s Talent Record Agency tab.

Agency Contact Information for <Candidate Last name, First name>



Agency History/Current Agency Grid

Field	Description
Agency name	The Agency code name.
Initial submission by named agency column	The date of the original submission in the format: dd-mmm-yyyy hh:mm:ss
Latest submission by named agency column	The date of the most recent submission in the format: dd-mmm-yyyy hh:mm:ss
Referral period ends column	The date the referral rights expire in the format: dd-mmm-yyyy hh:mm:ss
Current agency contact	The Current agency contact links to the View agency contact details page (as in the Talent Record).
Agency code	The Agency code links to the View code details page (as in the Talent Record).

Agency contact communications Grid

Field	Description
Date sent	The date the communication was sent: dd-mmm-yyyy hh:mm:ss
E-mail communication	The type of communication sent
Sent by	The user name for the user who sent the communication in the following format: <First name Last name> who sent the communication
Agency contact	The Agency contact links to the View agency contact details page (as in the Talent Record).

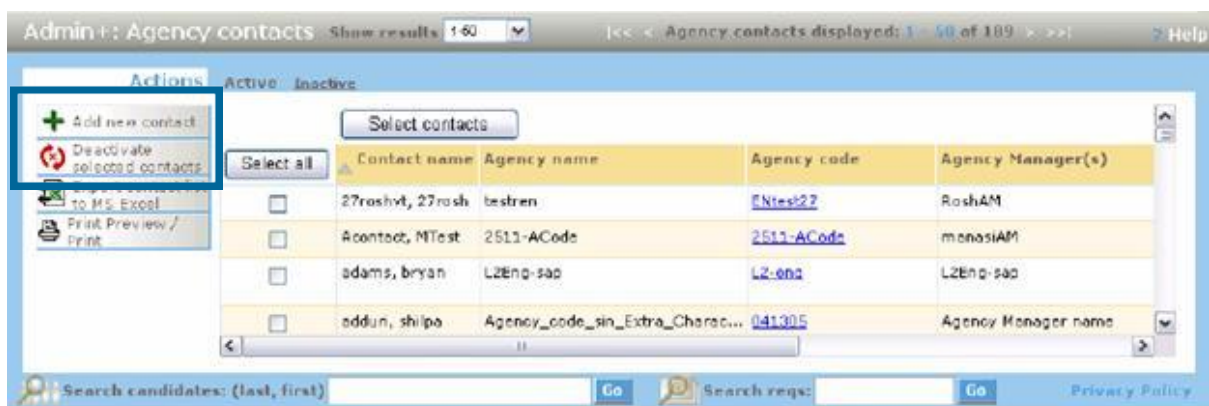
Clicking Close closes the window and returns you to the candidate output grid from which you came.



Restrict Posting Options by User Type Access

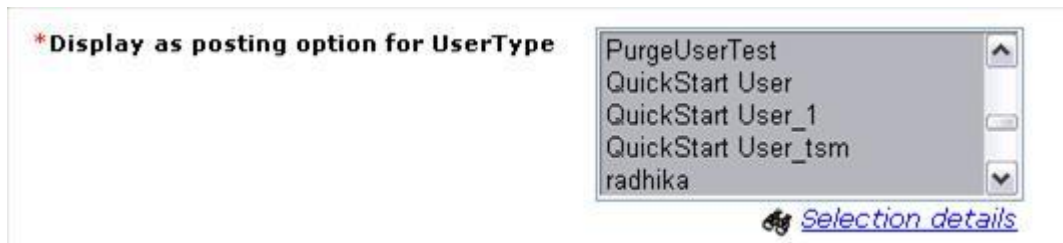
With Release 11, you can restrict by user type the ability of an Agency contact to post to Agency Managers through import. The Display for posting for User type setting applies to agency contact import in Workbench. This setting determines which Agency contacts display for the user on the Select agency access page based on user type.

To configure this setting:

1. In KRB, select Admin > Admin+ > Agency contacts.
2. The Admin+: Agency contacts page appears.



3. Click Add new contact  in the Actions menu to configure a new Agency contact with this setting. For an existing Agency contact, locate the contact in the grid and click the Edit contact icon .
4. In the Add agency contact / Edit agency contact window, scroll to the new setting.



Display as posting option for User type. The default setting is all user types selected. Select all the user types (one or more) who should be able to post to the Agency Manager represented by this Agency code.

5. Click Save to save the configuration changes and close the window.

Error Condition

When you click Save OR Save and add next, if there is a user with one or more active postings to this Agency code, and this user has a User type which you did not select for Display for posting for User type, an error message displays: “There are active postings associated to users of <User type> for this agency contact. Please remove the active postings before the User type can be changed.”

Note: Both the org group and user type restrictions are applied at the time of req posting on the Agency Manager.

Restrict Posting Options by Org Group Membership

With Release 11, KRB Admin+ users can restrict the ability of Agency contacts to post to Agency Managers by Org group membership.

The Org group setting controls the list of Agencies users see in their My agencies list when they are posting a req to an Agency Manager.

[When KRB users are opening and posting (or reposting) reqs to Agency Managers, they must configure Agency access as part of their posting workflow. They do so on the Select agency access page when posting the req. The KRB user will be able to see the Agency Managers listed on that page for which he or she has the same Org group membership.]

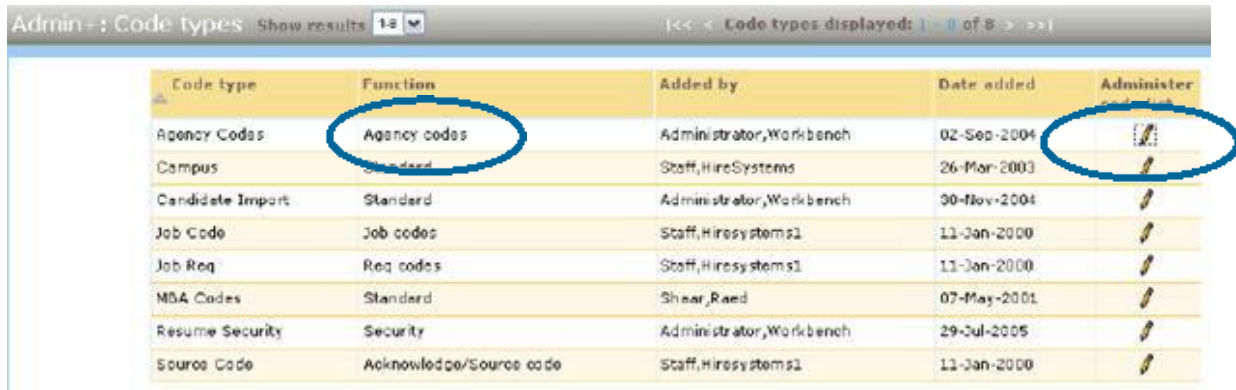
Each Agency Manager is represented in the system as an Agency code; an Agency code is a unique identifier for an Agency Manager. To configure the new settings for posting options









for a specific Agency Manager, Admin+ users must access “Codes” with a code type of “Agency.”


To access Agency codes, follow these steps:

1. In KRB, select Admin > Admin+ > Codes
2. The Admin+ Code Types page appears.

Admin+: Code types Page



Code type	Function	Added by	Date added	Administer
Agency Codes	Agency codes	Administrator,Workbench	02-Sep-2004	
Campus	Standard	Staff,Hiresystems	26-Mar-2003	
Candidate Import	Standard	Administrator,Workbench	30-Nov-2004	
Job Code	Job codes	Staff,Hiresystems1	11-Jan-2000	
Job Req	Req codes	Staff,Hiresystems1	11-Jan-2000	
MBA Codes	Standard	Shear,Raed	07-May-2001	
Resume Security	Security	Administrator,Workbench	29-Jul-2005	
Source Code	Acknowledge/Source code	Staff,Hiresystems1	11-Jan-2000	

3. Locate the Agency codes code type in the grid.
4. Click the pencil icon  for that code type in the Administer code list column.
5. The Administer code list page appears. This is a list of all the Agency Managers which have been added to the system.

Administer code list Page: The list of Agency Managers in your system

Actions

- + Add new code
- Deactivate selected codes
- Export code list to MS Excel
- Print Preview / Print

Select all	Code	Agency name	Description	Location	Country	Agency contact	View details	Edit code	Deactivate
<input type="checkbox"/>	ADDFR	Addeco France	French Search provider	High-Normandy	France	1			
<input type="checkbox"/>	AMNPW	Manpower	General	Lincolnshire	United Kingdom	2			
<input type="checkbox"/>	DEdecco	Adecco Deutschland	tbd	Bayern	Germany	1			
<input type="checkbox"/>	DINKI	Dinkins Staffing Services	Prfessional Placement	SOUTH CAROLINA	United States	4			
<input type="checkbox"/>	ExecTal	Executive Talent, LLC	Executive Positions	CALIFORNIA	United States	2			
<input type="checkbox"/>	FRZN	Franzen, Inc	West/Mid West	MICHIGAN	United States	1			
<input type="checkbox"/>	GRTHR	Great Hires	General	ILLINOES	United	1			

Search candidates: (last, first) Go Search reqs: Go Privacy Policy

6. To edit an existing Agency code, find the code in the grid and click the associated Edit code icon.

7. The Edit code page displays.

8. Select the Org group(s) who will have the ability to post in the Display as posting option for org group(s) setting. related to posting.

* Display as posting option for Org group(s): This is a required field. This field determines which Agency Managers display for the user on the Edit posting options page based on the user's Org group(s).

The default selection is All Org groups. Select one or more Org groups from the list of all configured Org groups for this client to restrict by Org group membership the ability of users to post to this particular Agency Manager. (Only users belonging to the selected Org group(s) may post to the Agency Manager represented by this Agency Code.)

Allow new postings even if Agreement expiration date has elapsed Yes No

* Display as posting option for org group(s)

- ReqTest
- ReqTest1
- SRGROUP
- test
- test org group

[Selection details](#)

9. Click Save Or Save and add next to save your changes.

Error Condition

When you click Save Or Save and add next, if there is a user with one or more active postings to this Agency code, and this user belongs to an Org group which you did not select for Display for posting for Org group(s), an error message displays: “There are active postings associated to users within <Org group> for this agency code. Please remove the active postings before the Org group can be changed.”

Allow New Postings after Agreement Expiration Date

Agency Managers can enable a setting for each configured Agency contact allowing the contact to leave reqs posted after a posting agreement has expired.

Allow new postings even if Agreement expiration date has elapsed Yes No

* Display as posting option for org group(s)

- ReqTest
- ReqTest1
- SRGROUP
- test
- test org group

[Selection details](#)

This setting is optional. You can change the setting if desired. The default selection is Yes. [Verify] When Yes is selected, the user can continue to post jobs to the Agency Manager represented by the Agency code even when the Agreement expiration date is in the past.

Reqs posted before the Agreement expiration date continue to display on the Agency Manager, and remain active until the posting expires automatically due to:

- The setting for the days to remain posted field causes the posting to be removed.
- The Req status is updated to Closed, Cancelled, Deleted, or On Hold, which causes the posting to be removed.


Agency Manager - Posting Reqs

Users with the appropriate privileges can open and post reqs to Agency Managers and edit posting options for reqs on the the **Select agency access** page. Users access this page by opening a req or editing the posting options of a posted req.

New in Release 11:

The **Select agency access** page has three new fields, **My Agencies**, **Search for agency**, and **Filter by specialization**, and the **Administer my agencies** button. From this page users can select one or more of their own agencies from the **My agencies** list, search for an agency, and retrieve agencies by their specialization.

To select or edit settings for access to open, post, and edit requisitions on specific Agency Managers:

1. On the posting options page, under Agency Managers, find the Agency Manager in the list for which you want to manage agency access and click its edit icon  in the **Select/edit agency access** column.
2. The **Select agency access** page opens. From this page you can perform several agency administration tasks, including the following:
 - Post the requisition to the agencies to which you have access (the **My agencies** multi-select list).
 - Administer the agencies to which you have access (**Administer My agencies**).
 - Search for an agency. You can either click the **List** button and perform a typical KRB search or select a specialization in the **Filter by specialization** field. See page 235 for more information about performing a search for an agency.
 - Set up automatic notifications, one for posting and the other for posting removal or un-posting.

Select Agency Access Page

Showing agencies: 1 - 3 of 3 Selected agencies

Preferred Fee	Specialization	Description	Country (main)	Location (main)	City (main)	Select agency contacts
percentage						All
N/A						All
Yes	Awesome Hires	The Best Agency	United States	MASSACHUSETTS	Cape Code	All

Showing agencies: 1 - 3 of 3 Selected agencies

Notify selected agency contacts at the time this req is posted to selected Agency Manager(s).

Notify selected agency contacts at the time this req is unposted from selected Agency Manager(s).

Click List >> to open a search box for Agencies, or select a specialization in the Filter by specialization list.

- Setting to notify agency contacts when a req is "unposted."

Select Agency Access, New Fields

Field	Description
My agencies	Displays agency names for which the user has Org group access and user type privileges. To administer specific agencies, select them in the My agencies list and click Go. To administer all agencies, click the Administer my agencies button.
Search for agency	Click the List button to select an agency. The Search for agency window opens where you can enter your search criteria. You cannot use Search for agency and Filter by specialization together.
Filter by specialization	Select an agency specialization from the dropdown list. You cannot use Search for agency and Filter by specialization together.

Notify selected agency contacts at the time this req is un-posted from selected Agency manager(s)

Select the check box to send automatic e-mail notification to the Agency contact when the req is un-posted.

Searching for Agencies

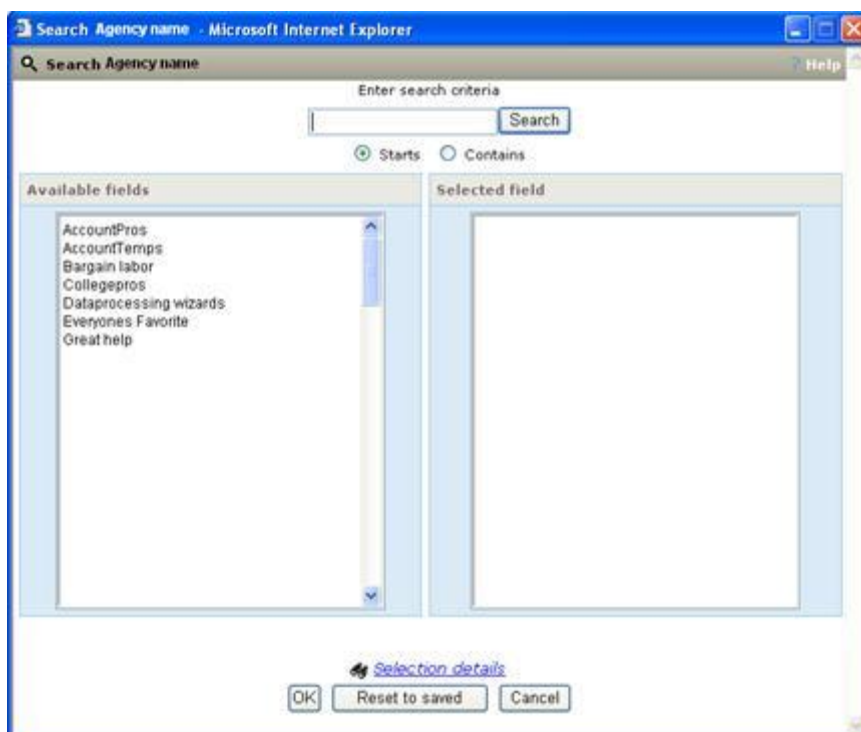
To search for agencies by listing them all:

1. On the **Select agency access** page, click the **List >>** button to open the **Search agency name** window and enter your search criteria.

Starts: If you enter text into the search text box, the **Starts** radio button is selected, and you click **Search**, the search returns Agency names starting with the entered text in **Available fields** box. This is the default setting with no values selected.

Contains: If you enter text into the search text box and the **Contains** radio button is selected, and you click **Search**, the search returns Agency names containing the entered text in the **Available fields** box.

Note: If you enter no text in the search text box and click **Search**, the search returns all Agency names.



2. The **Available fields** box lists all of the Agency names to which you have access.
3. Select one or more fields in the **Available fields** list and click the **Add >>** button. The fields appear in the **Selected field** box.

4. Click **OK** to save your configuration. Otherwise, click **Reset to saved** to go to your last saved configuration. Click **Cancel** to close the window without saving anything.
5. The **Select agency access** page refreshes and displays the agency (or agencies) you retrieved in your search.
6. Continue selecting or editing posting options for the req(s).
7. Click **Save posting options** when you are finished.

Filtering Agencies by Specialization

To filter agencies by specialization (such as temporary work, seasonal work, and so forth):

1. On the **Select agency access** page, select a specialization in the dropdown list.
2. The page refreshes to display the list of agencies by the selected specialization in the grid.
3. Continue selecting or editing the posting options for the req(s).
4. Click **Save posting options** when you are finished.

Administering My Agencies

Agency users can select Agency names to make them available in the list of Agency names. The selection lists contain those agencies to which users have access through Org group membership and User type privileges.

To select agency names for display:

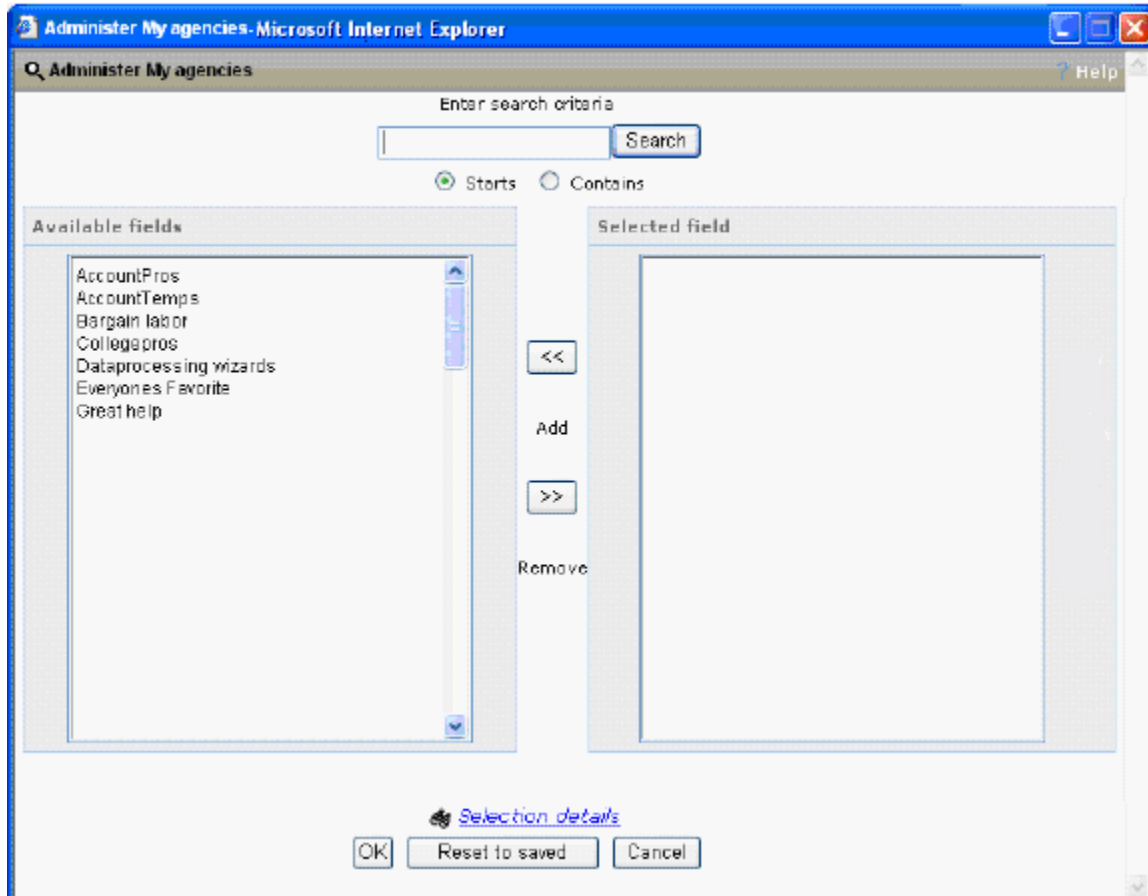
1. On the **Select agency access** page, click the **Administer my agencies** button. The **Administer My agencies** page opens. See the screen capture below this procedure.
2. On the **Administer My agencies** page search for a specific Agency name if desired. If you enter nothing into the search box and click **Search**, the search returns all Agency names sorted in alphabetical order.

Starts: If you enter text into the search text box, the **Starts** radio button is selected, and you click **Search**, the search returns Agency names starting with the entered text in **Available fields** box.

Contains: If you enter text into the search text box and the **Contains** radio button is selected, and you click **Search**, the search returns Agency names containing the entered text in the **Available fields** box.

3. Select one or more fields in the Available fields list and click the Add >> button. The fields appear in the Selected field box.
4. Click OK to save your configuration and close the window. You are returned to the Select agency access page which displays the selected agencies in alphabetical order in the My agencies field. Otherwise, click Reset to saved to go to your last saved configuration. Click Cancel to close the window without saving anything.

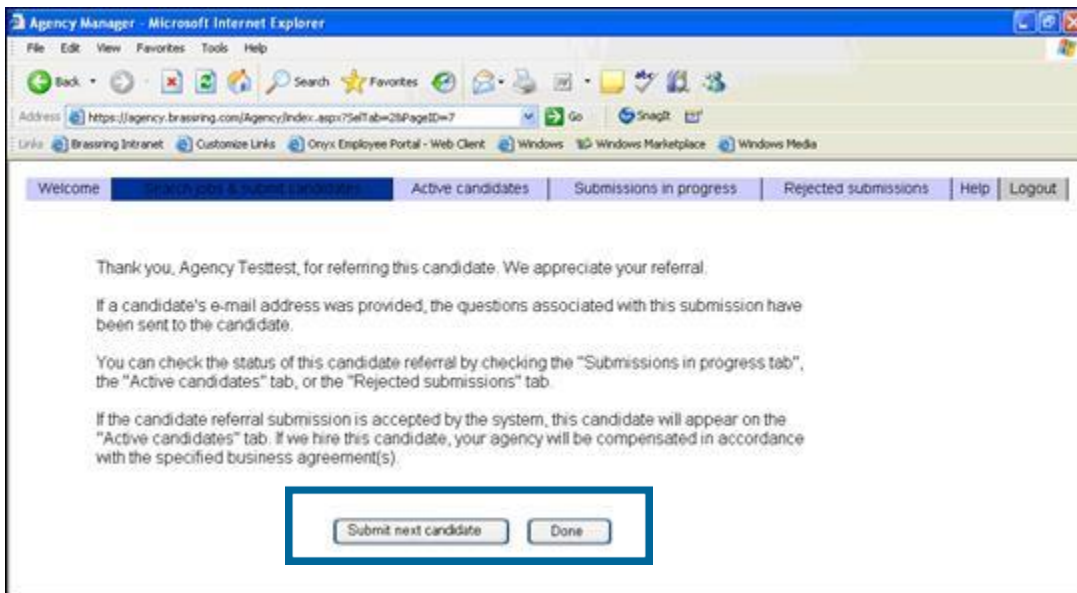
Administer My agencies Window



Submit Multiple Candidates to the Same Req

On the Agency Manager submission confirmation page, KRB has added a Submit next candidate button. Users can submit multiple candidates to the same requisition and not have to search in succession for the requisition for each candidate. When users click the Submit next candidate button, the Submit a candidate page displays again for the same requisition the previous candidate was submitted for.

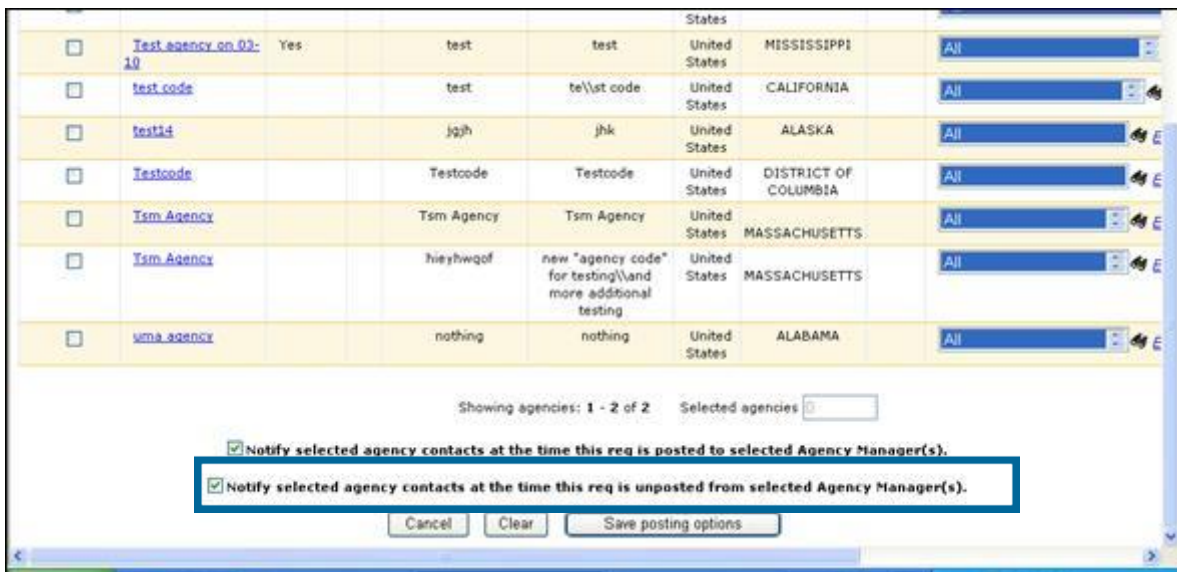
Users can click Done to return to the Welcome page without submitting another candidate to the req.



Configure Automatic Notifications for Un-posting of Reqs

Agency users can set up an automatic notification to agency contacts when a req is un-posted from the select Agency Managers.

1. When configuring posting options on the Select agency access page, select the check box for each Agency Manager to be notified.
2. Select the check box Notify selected agency contacts at the time this req is un-posted from selected Agency manager(s) below the grid.
3. An automatic notification is sent to the selected contacts when the req is un-posted from the Agency Manager.



Req Posting Removal E-mail Notification

When a posting is removed due to either automatically based on the Days to remain posted date or manually by a user removing the posting, and the checkbox for Notify selected agency contacts at the time this req is un-posted from selected Agency manager(s) is selected, the following email is sent to the Agency contact:

From: Agencymanager@trm.brassring.com (The sender's e-mail address is configurable.)

To: Agency contact <Last name, First name>

Subject line: posted req removed from <client name> Agency Manager

Attachments: Attachments contain a link to the Agency Manager site.

Message body:

“A posted req has been removed from <client name><Agency code>. Job title: <Position title> Req ID: <auto:optional>. This email has been auto-generated. Please do not reply to this e-mail.”

Example E-mail Notification for Posting Removal


Note: The e-mail address in the "From:" field is determined by your organization's environment.



Transfer Referral Rights to Candidates

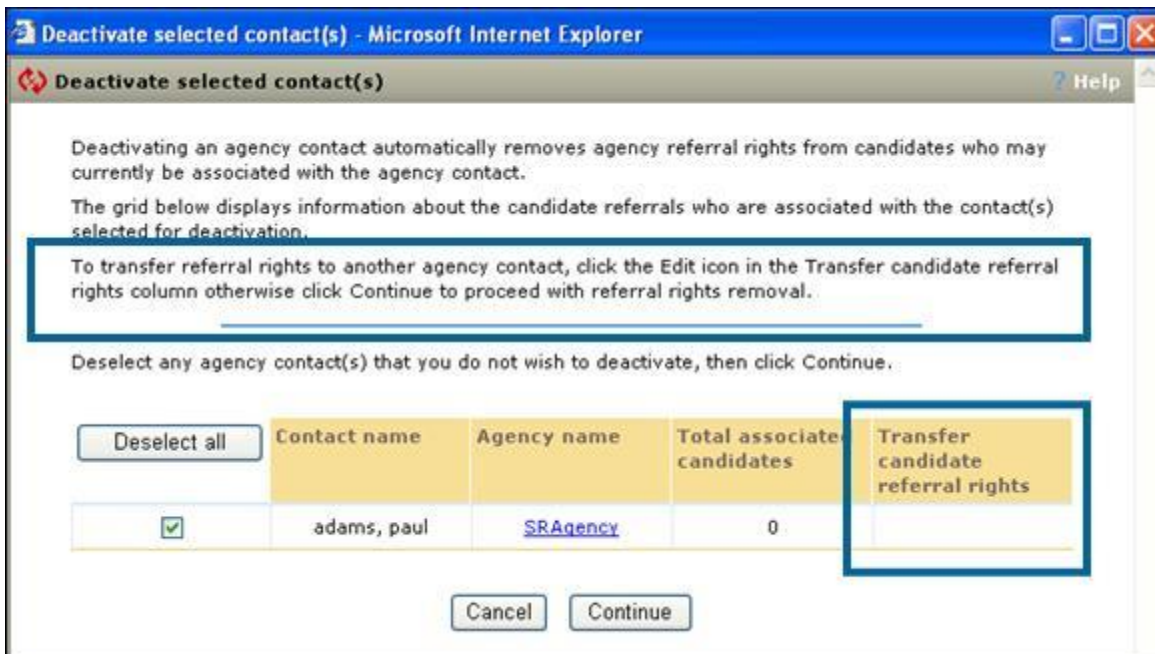
Agency users must transfer candidate referral rights to a different active agency before deactivating an agency contact.

To transfer referral rights:

1. Navigate to the Deactivate selected contacts page.
2. Locate the contact name you want to deactivate in the grid.
3. Click the pencil icon  in the Transfer candidate referral rights column.

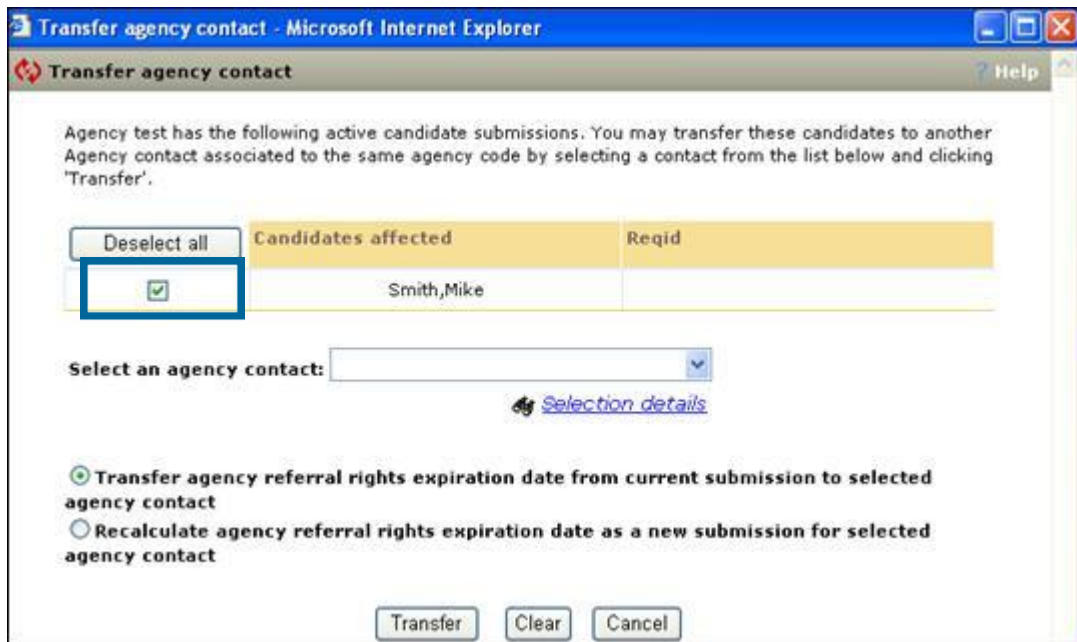
If the candidate's referral rights are not transferred before you click Continue, the referral rights are automatically removed from candidates, as in previous releases.

Deactivate Selected Contact(s) Window



4. The Transfer agency contact page displays with the list of all candidates associated with the agency user.

Transfer Agency Contact Window



By default, the **Transfer** radio button and **All candidates** are selected. If you do not want to transfer referral rights for a candidate, deselect the checkbox for that candidate. The referral rights of the deselected candidate are automatically removed.

The Agency referral rights are transferred only for the selected candidates. At least one candidate should be selected for transferring the referral rights.

- To deselect individual candidates, uncheck the check box by the candidate's name.
 - To deselect all the candidates in listing grid, click **Deselect all**.
5. Select the agency contact to whom you are transferring these candidates from the single-select list.
 6. Decide what to do for the expiration date for agency referral rights:
 - **Transfer agency referral rights expiration date from current submission to selected agency contact**

The **Yes** setting is selected by default. When **Yes** is selected, it maintains the referral expiration date of the submission and transfers that date to the selected agency contact.

- **Recalculate agency referral rights expiration date as a new submission for selected agency contact**

When **Yes** is selected, the referral expiration period is calculated based on the transfer date to the selected agency contact.

7. Click **Transfer** to transfer referral rights for selected candidates to the selected agency contact. The window closes and the **Transfer agency confirmation** page appears.

Otherwise, click **Clear** to clear all selections and return the page to the default values. The window stays open. Click **Cancel** button to closes the window without saving any changes and return to the **Deactivate selected contact(s)** page.

See the list of error conditions at the end of this section.

8. When the user clicks **Transfer** on the **Transfer agency contact** page, the confirmation page displays the following message: “The referral rights have been successfully transferred.”
9. Clicking **OK** returns you to the **Deactivate selected contact(s)** page.

Error Conditions

If you click **Transfer** without selecting an agency contact, the following error message displays: “Please select an agency contact.” Click **Close** to close the pop-up window.

If you deselect all candidates and click **Transfer** an error message displays: “Please select a candidate.” Click **Close** to close the pop-up window.

How Agency Referral Rights Expiration is Calculated: The expiration for Agency referral rights is calculated based on the option selected on the **Transfer agency contact** page.

- If the option **Transfer agency referral rights expiration date from current submission to selected agency contact** is selected, there is no change in expiration date.
- If the option **Recalculate agency referral rights expiration date as a new submission for selected agency contact** is selected, the expiration date is recalculated.

Updated “Deactivating Contacts” Message

With Release 11, the text information at the **Deactivate selected contacts** page has been updated to the following:

“Deactivating an agency contact automatically removes agency referral rights from candidates who may currently be associated with the agency contact. The grid below displays information about the candidate referrals who are associated with the contact(s) selected for deactivation. To transfer referral rights to another agency contact, click the **Edit** icon in the **Transfer candidate referral rights** column otherwise click **Continue** to proceed with referral rights removal.”

Asian Profile Enhancements

Japanese Localization

With Release 11, Japanese is a purchasable UI language for KRB, Talent Gateways, and Agency Manager. The Japanese Localization project includes the following enhancements:

- KRB, TG, and AM have been translated into Japanese.
- KRB has been localized for Asian cultural requirements such as name order, date format, geographical regions, and so forth. Please see the list of sub-projects below for more details.

The Japanese localization project consists of the following sub-projects:

- Translation of the user interface
- Implementation of pronunciation keys for Candidate First name and Last name
- Reversal of the name order for candidates
- Removal of the middle name for candidates
- Implementation of macro to micro address order
- Changes to date format and date fields
- Listing of States/Regions/Provinces in Japan in geographical order
- Changes to numeric data validation messages
- Addition of appropriate line breaks and column headers for Standard Reports
- Substitution of a new default font for PDF reports
- Adaptation of the “Same user name differentiator” to the Japanese locale

Benefits

Kenexa has tailored the localized version of Kenexa Recruiter BrassRing, Talent Gateways, and Agency Manager to meet the specific needs and expectations of Japanese users.

Costs

The cost for implementing Japanese as a UI language is the standard cost for any new UI language. The purchase of the Japanese locale includes localization updates.

Availability

Release 11

Visible Changes

Japanese locale users will see the changes associated with this feature. All users see the list options for the Region/Province/State fields displayed geographically rather than alphabetically.

Limitations and Known Interactions

Column data in standard reports do not break properly within report output columns. Column headers do break properly.

For Japanese locale users, candidate middle name field is not visible to recruiters from within Kenexa Recruiter BrassRing.

For Talent Gateways and Agency Manager, your organization's configuration determines whether the candidate middle name field displays or not.

Best Practice Recommendations

None

Overview of Implementation

To implement the Japanese locale for a client, Kenexa personnel configure several settings in Workbench on behalf of the client.

User Experience

KRB users will see the following:

- The translated user interface:

The screenshot displays the Kenexa Recruiter BrassRing user interface in Japanese. The top navigation bar includes the Fronterra logo and menu items: 求人検索, 応募者, レポート, その他, ホーム, and ログアウト. The main content area features a search bar and several filter options: 検索条件の保存, 検索フィールドの編集, 出力フィールドの編集, and 保存した検索条件の読み込み. Below this, there are radio buttons for 開封付された求人検索 and 開封付された求人検索なし. There are also dropdown menus for 求人検索を絞り込む, 検索理由, 応募者のタイプを絞り込む, 言語, 都道府県, 職種, and 職種属性. The bottom of the page shows 応募者の数: (数, 名) and 求人検索の数: (数, 名) with 実行 buttons.

■ Pronunciation keys for Candidate Last name and First name:

We have added two new fields to the master list of applicant fields to support the Japanese locale: Last name pronunciation key and First name pronunciation key. These fields are visible only to Japanese locale users.

The Last name and First name pronunciation keys display in the Talent Record Overview tab in KRB.

Users with the appropriate privileges can modify them.

Users can search on the pronunciation key fields from Candidate search and quick search.

The Communications Module includes two new tokens for use in e-mail, letter, and document templates (new in this release).

Last name and First name pronunciation keys:

- Display in candidate output grid columns
- Display in DEW (Candidate fields)
- Display with the candidate's name in standard reports
- Display as profile fields on Japanese language Talent Gateways and Agency Managers
- Can be configured as required or optional.
- Can be added to Candidate form Autofill from options list
- Are available within Candidate import and export

■ Reversed name order for candidates:

For Japanese locale users, candidate name displays as “Last name First name” (with no comma).

Clients can configure candidate name display one of three ways for TalentGateways and Agency Managers: (First Middle Last), (First Last) or (Last First)

■ Imposed a macro to micro address order

For Japanese locale users in KRB, address fields have been reordered: Postalcode, Country, State, City, Address1, Address2.

For TGs & Agency Managers, address order can be configured:

- Address1, Address2, Country, City, State, Zipcode
-



Country, Zipcode, State, City, Address 1, Address 2

◦ Address1, Address2, Zipcode, City, State, Country

■ Removed middle name for candidates

Edit candidate overview: Applebaum Wayne - Microsoft Internet Explorer

Edit candidate overview: Applebaum Wayne

Address summary

* Last name Applebaum

* First name Wayne

Last name pronunciation key Ap pill bomb

First name pronunciation key Way in

Address 1 1312 Shamrock Lane

Address 2

City Plano

State TEXAS

Zip/Postal code 75093

Language English (US)

Country United States List >>

Check to refresh the State field

Home phone 333-444-5555

■ Changed the date format and date fields

Localization changes have tailored application to meet the specific expectations and needs of Japanese users

For Japanese locale users in KRB, date field order has been reversed from dd-mmm-yyyy to yyyy-mmm-dd throughout application

For Talent Gateways and Agency Manager, clients may configure date display as follows:

US English Locale	Japanese Locale
dd-mmm-yyyy	dd mmm yyyy
dd/mm/yyyy	dd-mm-yyyy
dd.mm.yyyy	mm/dd/yyyy
mm-dd-yyyy	mm.dd.yyyy
yyyy/mm/dd	yyyy-mm-dd
yyyy.mm.dd	yyyymmdd



- Listed options for States/Regions/Provinces in Japan in geographical order

For a Japanese locale user, the option list which displays for the State/Region/Province field will display geographically rather than alphabetically when Japan is selected as the Country.



- For Japanese locale users, all numeric validation messages indicate when numbers are single- or double-byte.



- Included appropriate line breaks and column headers for standard reports
- Instated a new default font of MS Gothic for PDF reports when run by a Japanese locale user.
- Adapted “same user name differentiator” to the Japanese locale. When enabled, the differentiator displays after the first name; for example: Smith John (123-456-7890)

Automation Manager

For Release 11, Kenexa introduces the Automation Manager (AM), which extends automated notifications and introduces new automation options. Through the AM, clients can configure a variety of automated actions and communications to streamline their recruiting processes and save recruiter time on administrative tasks.

Clients can set up triggers for notifications for the following events:

- Req aging
- Candidate HR status aging
- HR status update
- HR status update – Send Talent Record
- View Talent Record – Update HR status
- Gateway posting expiration

Benefits

Clients benefit from streamlined recruiting processes. Recruiters increase productivity by saving time on routine administrative tasks

Costs

There is no cost for the Automation Manager utility. For clients who are not Workbench-certified and want to take advantage of this enhancement, there is a cost to implement triggers

Availability

Release 11

Visible Changes

The Automation Manager utility is available in Workbench for Tier-3 certified Workbench users. See the Workbench Self-Service help for setup information.

Limitations and Known Interactions

Not all triggers have full email template functionality. There is no mechanism to complete missing data.

Best Practices

Clients using Talent Record viewed trigger where the selected start status has a pop-up form, should seriously consider whether they want to use this trigger. This trigger has the potential of generating a high volume of emails, reducing the time savings that automation was meant to provide.

For candidate-facing notifications, we recommend that clients enter a return e-mail address. Otherwise, candidates will receive communications from “Automation Manager.”

Overview of Implementation

Automation Manager is configured in Workbench. It requires a new Workbench certification level (tier 3), and the appropriate user-type privileges to add, edit, administer, and so forth.

The major configuration steps for Automation Manager are:

1. Review the types of automated triggers available.
2. Determine which notifications and/or communications your organization would like to implement automated management for.
3. For each type of automated notification or communication, configure an e-mail template for the automated e-mail message.
4. Establish your return e-mail address setting.
5. Configure a set of triggers for testing.
6. Test the configuration.
7. Correct errors.
8. When you have configured and tested each trigger successfully, configure the actual triggers your organization has decided upon.

Please see the *Workbench 11 Release Notes* for detailed information (available in late March, 2008).

Candidate Experience - Candidates can Update TG Profile Attachments

Candidates can upload new attachments when editing their profile on the Talent Gateway.

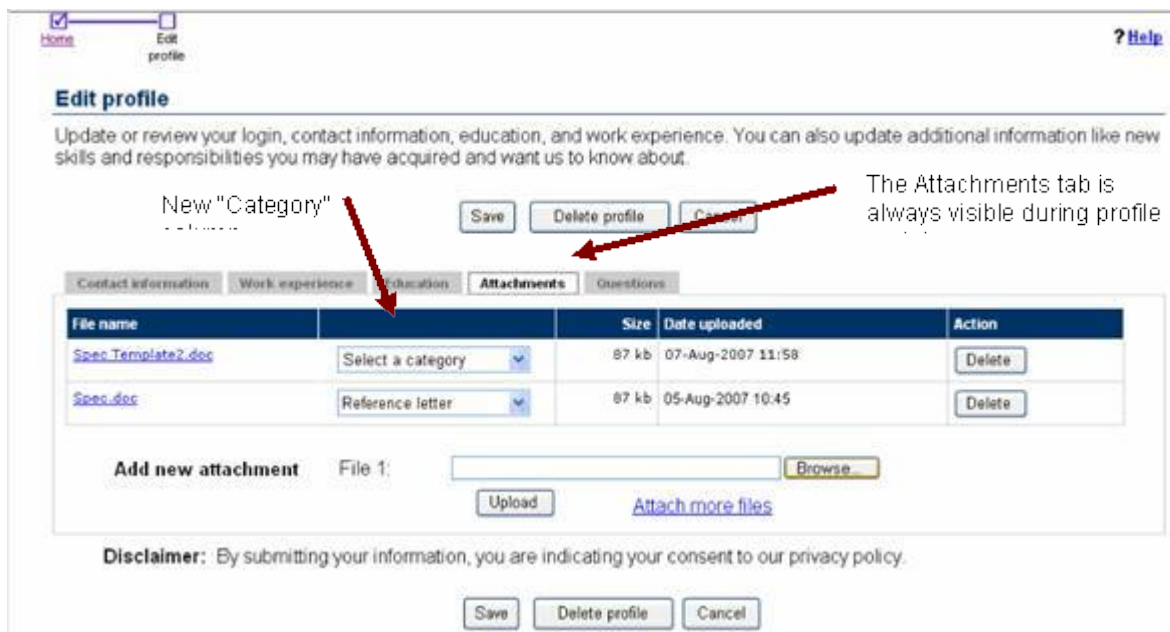
Benefits

Candidates will be able to better manage their attachments by uploading new attachments when editing their profile.

Cost

There is no additional cost associated with this feature.

Visible Changes



In Release 11, candidates will see the Upload attachment box when editing their profile. In addition, the Edit profile attachments tab has a new column called "Category."

Overview of Implementation

The major steps for allowing profile attachments to be updatable by candidates through Talent Gateways are:

1. Kenexa personnel: For each TG, configure settings in Workbench that control the number of attachments and the maximum size of individual attachments that can be uploaded through the Talent Gateway.
2. Kenexa personnel: Configure Attachment categories.

Talent Gateways: Candidate Experience

The Add new attachment field is
now

On Talent Gateways that accept attachments (the Attachments setting is enabled in Workbench), candidates will see the Attachments tab when editing their profile. (Previously, this tab appeared only if the candidate had existing attachments from a previous submission.)

On the Edit profile page in the Upload attachments box, candidates browse to and select an attachment for uploading. When uploading an attachment, the candidate must select a category for it.

- If the attachment is an update to an existing attachment, its original attachment category is selected for it. The candidate can select a different category if desired.
- If the attachment is new, the candidate must select an attachment category from the dropdown list.

After the candidate clicks Upload, the attachment category displays beside the File name and the attachment is added to the Attachments grid on the Attachments tab.

When candidates are adding a new attachment, the Category field is set to “Select a category.” For all existing attachments, the category selected at the time of uploading the original attachment is selected in this field by default.

Note: With Release 11, Kenexa Recruiter BrassRing Administrative users can define attachment categories for classifying attachments.

Because the candidate is updating his or her profile and is not applying directly to a position, the updated attachments is not associated with a specific job submission.

To upload another attachment, the candidate clicks the Attach more files link. This link is available until the candidate reaches the maximum number of attachments that can be uploaded.

Client settings determine the number and size of the attachments the candidate can upload. The client settings “Number of attachments” and “Max size per attachments (mb)” determine the number and size of the attachments that the candidate can upload on the Edit profile - Attachments tab.

These settings are configured in Workbench. The path is Tools > Talent Gateways > Admin > Talent Gateway details.

When the candidate clicks Save, the changes to the profile are saved (including any updated or newly added attachments) and the Profile updated confirmation page displays.

Error Messages

The Talent Gateway displays an error message when the candidate makes any of the errors listed below and clicks Save:

The attachment size is larger than the configured value for the maximum size limit:

“The maximum size for each attachment is [x] mb. The following attachment(s) exceeded the size limit: [file list]”

The 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 (if Office 2007 support client setting = "No")

“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]”

The file type of attachment not supported (if Office 2007 support client setting = "Yes"):

“The attachment must have a file extension of .bmp, .csv, .doc, .docx, .gif, .htm, .html, .jpg, .ppt, .pptx, .pdf, .rtf, .tif, .txt, .xls, .xlsx or .xml. The following attachment(s) have invalid extension types: [file list]”

■ The candidate did not select a Category for the attachment:

“ Select a category.”

The candidate browsed to a directory and selected a file, but did not upload the file.

“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]”

Candidate Experience - Candidates Proximity Search for Jobs

Candidates can search for jobs within a certain distance of a city within the US and internationally.

Benefits

Candidates can narrow down their job search to positions within a selected set of longitude and latitude coordinates which demarcate a square around the search location. Candidates can find jobs in the right location more easily.

Cost

There are no additional costs associated with this feature.

Availability

Release 11

Visible Changes

There is not visible change without Workbench configuration.

Limitations and Known Interactions

Proximity search can not be configured as part of Job code default data.

Proximity search can not be used in conjunction with Job Match on the Talent Gateway.

The Zip postal code field checks against five (5) characters and displays when United States is selected as the Country. It does not display if the candidate selects a country other than the United States.

Proximity Search Fields in Other-Language Reqs

When KRB users are adding or editing a requisition in a language different than his or her own language, as defined in the KRB user profile:

- The field labels and list options display in the language of the requisition.
- The list options for the Country and State/Province/Region field display in the user's language.
- The list options for the City field display in the user's language if the localized text is available; otherwise the list of cities display in US English.

Req import (xml and non-xml) support the Set proximity coordinates field. However, even if the field is required at the req template level, it will not be required for the req import to succeed.

Best Practice Recommendations

None

Overview of Implementation

The purpose of these enablement steps is to make a job req “findable” by a candidate who is searching on the job search page of a Talent Gateway.

To make the req “findable,” it must be associated with a req template which includes “proximity coordinate” fields. Those proximity coordinate fields must be completed on the req before it is opened and posted to one or more Talent Gateways.

The req must be posted to one or more Talent Gateways for which the proximity search fields are enabled.

If all the above conditions are met, candidates looking at reqs using the proximity-enabled req template on proximity-enabled Talent Gateways will be able to perform a proximity search for jobs.

To configure proximity searching on Talent Gateways:

1. Clients must decide which req templates should have proximity search enabled.
2. Clients must decide which Talent Gateways should have proximity search enabled.
3. Kenexa Personnel: Turn on the Enable job proximity search fields on each Talent Gateway.
4. Kenexa Personnel or Certified Workbench Users: Enable the fields for each req template for which proximity search should be active. See the Workbench 11 Manual for detailed steps.
 - a) Configure the proximity coordinates section for each req template.
 - b) Check the box to make the proximity fields required on the req template.

Note: Clients may want to configure proximity fields on the associated req template as “required.” Proximity searching from the Talent Gateway works only if the requisitions being searched on have the proximity fields completed when reqs are posted.

5. Kenexa or Certified Workbench Users: For each Talent Gateway that you are enabling proximity search for, customize text to display on the Talent Gateway for the proximity search field.
6. Kenexa Recruiter BrassRing Users:
 - c) Add a req using a req template which has “proximity search” enabled.
 - d) Post the req to one or more Talent Gateways which has “proximity search” enabled.

7. Talent Gateway Users: Candidates who engage in a proximity search which captures the location of the posted req will retrieve that req in their search.

User Experience

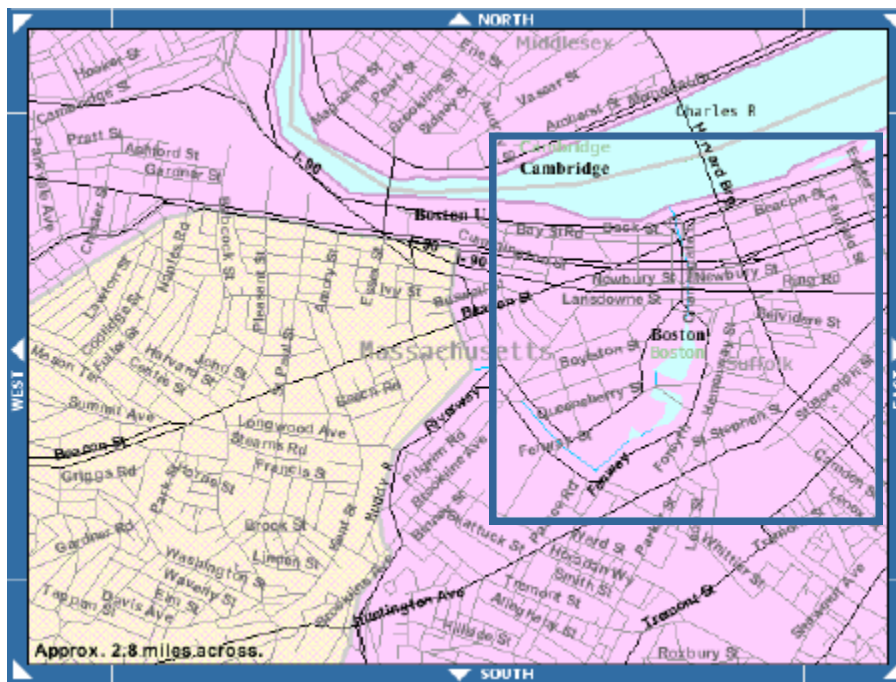
KRB: Adding or Editing a Requisition

To make the job “findable” through a proximity search by the candidate on a Talent Gateway, the Recruiter or KRB user must create or edit a req which uses a req template containing the Proximity coordinates section. Users must complete the proximity fields on the req before saving it and eventually posting it.

On the Add req or Edit req pages, ensure that the Country, Region (typically the region is a State or Province or other jurisdiction within a country), and City fields are completed in the Proximity coordinates section of the requisition.

When candidates select United States in the Country field, the Zip code field displays. Candidates can either enter a city or a zip code as the reference point for the proximity search.

Note: Proximity search is conducted within a square around the selected location based on coordinates for longitude and latitude.



[This is a public domain map from the U.S. Census Bureau (<http://www.census.gov/geo/www/tiger/tigermap.html#MAPSURF>)]

Talent Gateways: Search for Job Openings Using Proximity

The Proximity search field displays on the Search jobs page below the Date posted field. The Search jobs page supports both US and international proximity search for candidates.

To search by proximity on a Talent Gateway:

8. In the Proximity search area, select the Country in the dropdown list. Once you select the Country, the State/Province/Region field is populated with the appropriate jurisdictions.
9. Select the jurisdiction in the State/Province/Region field. Once you select the jurisdiction, the City field is populated with the cities and towns for that jurisdiction.
10. Select the city.
11. In the Include jobs within field, select method for measuring the distance: Miles or Kilometers.
12. In the Include jobs within field, select the distance.
13. Click Search.
14. If you want to start a new search, click Clear to empty the fields and start again.

Note: If the candidate selects "United States" in the Country field, the page refreshes and the Zip postal code field appears. Candidates can enter a Zip code instead of the State/Province/Region and City if they prefer.

Proximity search

Include jobs within

Country

of State/Province/Region

City

or **Zip postal code**

Candidate Experience - Connect any Form to a Job Submission

Clients may elect to offer “per req” forms as options for attachment by KRB users when posting to Talent Gateways and Agency portals. Once added, these forms are presented to candidates during req-specific application workflows.

Note: You cannot use “per req” forms for non-req-specific submissions (“jobless applies”).

With Release 11, “single per candidate/req” and “multiple per candidate/req” forms are available in the following locations:

- On Full, Referral, and Global Talent Gateways (at the member level) for req-specific submissions.
- During candidate workflow for req-specific submissions on Agency portals
- During candidate workflows using Gateway Questionnaires for req-specific submissions.

Note: Attaching a GQ to a Gateway makes it available for jobless submissions; therefore, you cannot attach a GQ with “per req” forms or “per req” form questions to a Gateway.

- Within the eLink contained in the automatic notification to referral candidates.

Benefits

Candidates do not have to re-key the data on a form for each job submission.

KRB is able to capture candidate data on a “per req” basis on Full Talent Gateways and Referral Gateways, and through Gateway Questionnaires. The “per req” data is automatically reflected in reporting.

Agencies can attach “per req” forms to the Agency Manager and circulate “per req” forms via eLink.

Your organization can track and report on changes to candidate data over time. For example, using this feature, your organization can capture a candidate’s change in veteran or disability status.

Visible Changes

There are no visible changes associated with this feature without configuration.

Cost

There is no additional cost for enabling this feature. Clients should be aware that enabling this feature will increase storage requirements for candidate data.

Limitations and Known Interactions

This feature allows users to attach candidate “per req” forms only. It does not include Talent Gateway forms or Job response forms.

Candidate per req forms cannot be used in the “jobless apply” (non-req-specific) workflow.

When clients use per-req forms on Talent Gateways, it results in significantly increased data collection for each candidate. This affects reporting data as well.

Availability

Release 11

Overview of Implementation

Kenexa personnel enable Workbench settings for Talent Gateways, Referral Gateways, Gateway Questionnaires, and Agency Managers.

Certified Workbench Users can use “per req” form questions in certain Gateway Questionnaires (ones that must be used for req-specific submissions).

The major configuration steps are:

1. Kenexa personnel: Add candidate forms of the “single per candidate/req” and “multiple per candidate/req” type to list of available forms, or edit these two types of forms in Workbench. These forms cannot be used for non-req-specific submissions (“jobless applies”).
2. Kenexa personnel: For Full Talent Gateways, attach per req forms of various types to the Talent Gateway.
3. Kenexa personnel: For a Referral Talent Gateway, attach per req forms to the referred candidate eLink in the Referred candidate eLink forms attached field.
4. Kenexa personnel: For an Agency portal, configure the Attach per req forms setting.
5. Kenexa personnel or Certified Workbench Users: For a Gateway Questionnaire, include questions from “per req” forms in a req-specific GQ. See the *Workbench 11 Release Notes* for more information.

Feature Details

Upon a candidate’s submission through a Talent Gateway or Gateway Questionnaire, KRB determines if the candidate has completed the attached Talent Gateway or Gateway Questionnaire form for any requisition.

If the candidate has completed that particular form, KRB displays the data from the most recent submission. The candidate can review and edit the form as necessary before submitting it again.

The system handles single- and multiple- per candidate/req forms differently:

- Single per candidate/req forms: For forms of this type, one (1) version only can be stored for a specific requisition on the Candidate's Talent Record.

If the candidate applies to the position (represented by that same requisition) a second time through a different gateway of any type, the form is overwritten with the data input with the latest submission.

- Multiple per candidate/req forms: For forms of this type, multiple versions can be stored for a specific requisition on the candidate's Talent Record.

If the candidate applies to the position through a different gateway of any type, an instance of the form is maintained for each different submission.

How TGs Validate the Candidate's Earlier Form Submissions

KRB uses the candidate's Talent Gateway login credentials to validate form submissions.

The data from the most recent submission displays for the candidate to review. The candidate can edit the data which populates the form as the default before making his or her submission.

How KRB Handles Simultaneous Submissions to Multiple Reqs

If the candidate is applying to multiple positions at the same time, he or she can review and edit the candidate form once. Upon submission, the form is stored as an individual instance for each requisition the candidate applies to.

If the candidate has not completed the form in the past, he or she can complete it once. Upon submission, the form is stored as an individual instance for each requisition the candidate applies to.

User Experience

With Release 11, KRB users can:

- Attach single- and multiple per candidate/req forms to Full Talent Gateways
- Create single per candidate/req combination(s)
- Save the form with all other settings and combinations of settings
- KRB users can use fields from single- and multiple- per candidate/req forms as questions on Gateway Questionnaires for req-specific submissions. Certified Workbench Users must configure GQs with the correct attributes first; see the *Workbench 11 Release Notes* or the *Workbench 11 Manual* (available on April 6, 2008) for more information.

Editing Posting Options for the Req

To edit the posting options:

1. In Kenexa Recruiter BrassRing, select Reqs > View All Reqs OR View My reqs > Open.
2. Select a req from the list and click the Posting options icon. The Edit posting options page displays.
3. Select the Gateway Questionnaire that includes the “per req” questions in the Select Gateway Questionnaire list. Selecting the GQ from this list box attaches the specific GQ questions to the Candidate's submission workflow on the gateway for the specific req.
4. Click OK.

Forms are Pre-Populated with Most Recently Submitted Data

“Per req” forms are pre-populated with the data submitted most recently. Candidates do not have to re-key the data on a form for each submission, even if the form was completed by the candidate for another requisition. KRB determines at submission time if the candidate has already completed the attached TG form for any req under the current login and displays the most recent submission if it exists.

When a candidate is in the process of completing the “per req” form, he or she can go back and edit the form prior to submitting it.

If a candidate completes a specific candidate “per req” form under one Talent Gateway login and logs in again under the same login, the form will contain the data supplied previously by the candidate. The candidate can edit the data in the form if desired prior to the subsequent submission.

However, if a candidate completes a specific req form under one login and then logs in under a different login, no data populates the form when accessed under the different login.

When a candidate completes the “per req” form, the data from the *most recent* submission displays for review by the candidate regardless of which req it was completed for.

When a candidate is applying to multiple positions, the “per req” form is available once for review and edit. Upon submission, the form is stored as an individual instance for each req the candidate applies to.

If the candidate has never completed the form in the past, he or she sees the form once, completes it, and submits it. The form is stored as an individual instance for each req the candidate applies to.

Effect of “Per Req” Forms on Reporting

When Talent Gateways enable the “per req” forms settings, more forms are created and this affects report results. Please make clients aware of this fact.

How the Talent Record Stores “Per Req” Forms

When candidate “per req” forms are available as attachments, and a candidate re-applies to a specific req, the Talent Record handles the forms as follows:

- For “Single per candidate/req” forms, the Talent Record stores only one form per req for the candidate. If the candidate applies a second time through a different gateway (internal, external, agency, and so forth), the attached form is overwritten with the new information.
- For “Multiple per candidate/req” forms, the Talent Record stores multiple instances of forms submitted by the candidate corresponding to each time the candidate applied to a position through a gateway (internal, external, agency, and so forth).

Talent Gateways: What Candidates Can Do

Candidates can:

- Submit single- and multiple- per candidate/req forms for the first time through a Talent Gateway
- Review and edit single- and multiple- per candidate/req forms that they have submitted previously. Previously submitted forms are populated by default with data from the most recent submission, so candidates do not have to re-key the information.

Talent Gateways: Workflows

This feature is available for Full Talent Gateways and Referral Gateways. It is not available for Basic Talent Gateways.

Talent Gateways display any “per req” forms appropriately in the job application workflow.

Non-req-specific submissions (“jobless apply”) workflows do not display “per req” forms because there is no req to attach the form to.

Full Talent Gateway Workflow

This section describes the workflow for job-specific applies through a full Talent Gateway.

For the first submission:

1. The candidate selects the position and clicks *Submit to Job*.
2. The candidate uploads a resume, cuts and pastes a resume, or completes a profile.
3. The candidate completes Talent Gateway questions.
4. The Talent Gateway displays the attached form.
5. The candidate completes the form and submits it.

For subsequent submissions:

6. The candidate selects the position and clicks *Submit to Job*.
7. The candidate uploads a resume, cuts and pastes a resume, or completes a profile.
8. The candidate completes Talent Gateway questions.
9. The form attached to the Talent Gateway displays with the data from the most recent submission.
10. The candidate does one of the following:
 - Reviews the form and submits it with no changes
 - Reviews and edits the form, and submits the form with changes
11. Kenexa Recruiter BrassRing saves the form.

RTG: What Referred Candidates Can Do

Referred candidates can receive an eLink to single- or multiple- per candidate/req forms in an e-mail. They can complete blank forms if it is the first time, or they can view and edit existing forms and resubmit them.

[Referral Gateway Workflow](#)

After the referring employee makes a req-specific referral submission, the system sends an e-mail which contains eLinks to the candidate forms to complete.

[General Submissions/Non-Req-Specific \(“Jobless Applies”\)](#)

There are no changes to current functioning for general submissions that are not to a specific requisition (“jobless applies”):

Note: Candidate “per req” forms do not display in this workflow because the candidate is not applying to a specific job.

1. The candidate logs in.
2. The candidate uploads or cuts and pastes a resume.
3. The candidate completes Talent Gateway questions.
4. The candidate submits the information.
5. The candidate receives the confirmation message ending the sequence.

AM: What Agency Managers Can Do

Agency contacts can post single- and multiple- per candidate/req forms on Agency Managers.

Agency contacts can send eLinks containing “per req” candidate forms to candidates.

Known Limitation: Agency contacts cannot send eLinked “per candidate” forms to other agency contacts.

Candidate Experience - Customize Text on the Resume/CV Manager Tab

Clients can elect to customize the text label for the checkbox field `Override profile information based on newly uploaded resume?`. This checkbox field displays on the `Resume/CV Manager` tab on Basic, Full, and Referral Talent Gateways, and on the `Resume/CV` page of the Gateway Questionnaire.

Certified Workbench Users or Kenexa personnel can customize the default text label in Workbench for Full and Referral Talent Gateways. For Basic Talent Gateways and Gateway Questionnaire, Kenexa uses the default text label or inserts a translated text label in place of the default check box label.

Note: Kenexa personnel must turn on the setting “Make extraction optional after first upload” in Workbench before the field “Override profile information based on newly uploaded resume?” is made active and available for customization.

Benefits

Clients can create a label for “Override profile information based on newly uploaded resume?” which makes more sense to the user.

Cost

There are no additional costs associated with this feature.

Availability

Release 11

Visible Changes

There are no visible changes without configuration.

Limitations and Known Interactions

Clients must first turn on `Enable auto extraction` to make the checkbox `Make extraction optional after first upload` active in Workbench.

Enabling `Make extraction optional after first upload` in Workbench causes “Override profile information based on newly uploaded resume?” to display to candidates on the Talent Gateway and within the Gateway Questionnaire.

Even if the setting `Make extraction optional after first upload` is turned on in Workbench, candidates see the checkbox field (or its configured label) for “Override profile information based on newly uploaded resume?” *only* if a profile already exists for the candidate.

Exclusion for Candidates Who Bypass Login

Candidates who bypass login for Gateway Questionnaires do not see the option *Override profile information based on newly uploaded resume? (or its customized label)* because they are not recognized as having a profile. As a result, extraction happens automatically if the not-logged-in candidate uploads a new resume.

Once auto-extraction has occurred, if the candidate selects the *Back* button on the browser, the browser sees the profile as existing and the candidate sees the option *Override existing profile based on newly uploaded resume?* because the not-logged-in candidate is now recognized as having a profile in the system.

Note: If the not-logged-in candidate has already selected *Use a resume/CV from my profile*, the option *Override existing profile based on newly uploaded resume?* does not appear on the page.

Best Practice Recommendations

None

Overview of Implementation

Kenexa personnel or Certified Workbench Users configure this feature in Workbench.

KRB/TG User Experience

Candidates will see customized text in place of “*Override profile information based on newly uploaded resume?*” if clients choose to customize this label.

Users encounter the option *Override profile information based on newly uploaded resume? (or the customized label for it)* in two places in their workflow:

- On the *Add resume/CV* page on the Talent Gateway
- On the *Resume/CV* page associated with the Gateway Questionnaire

The two screen captures below show the new checkbox option that displays to candidates on Basic, Full, and Referral Gateways.

On the Talent Gateway’s GQ Resume/CV Upload Page, candidates will see the checkbox option with either the default text label “Override profile information based on newly uploaded resume?” or your organization’s customized or translated text label. See the *Workbench 11 Release Notes* or the *Workbench Manual* (available April 6, 2008) for instructions on customizing this label.

In both workflows, candidates can select the checkbox for Override profile information based on newly uploaded resume? (or for the substitute customized text on Full Talent Gateways or Referral Gateways, or the translated text on Basic Talent Gateways).

Candidates who are creating a profile for the first time cannot see this checkbox because there is no existing profile in the system that would be updated as a result of this new resume/CV upload.

For candidates who have created a profile previously, when they select the “Override profile information ...” checkbox, the system updates the candidate’s existing profile with the new resume information. The candidate must click *Save* to save changes.

Candidate Experience - Recreate Profile from Latest Resume/CV

Clients can give candidates the option of overriding their existing profile (specifically the content for address, education, and experience) each time they upload a new resume. This feature can also be turned on for the Gateway Questionnaire. Note: Candidates can see this option only if they have saved a profile.

To enable this feature, clients must elect to turn on a new Talent Gateway setting, *Make extraction optional after first upload*. This setting is available for Basic, Full, and Referral Talent Gateways. When it is turned on, it is applied wherever auto-extraction is used for all languages that support auto-extraction (Dutch, English, French, German, Italian, and Spanish).

Clients can also customize the text for the label for this field. See page 32 for more information.

Benefits

Candidates can ensure their profile information is up-to-date.

Cost

There are no additional costs associated with this feature.

Availability

This feature was released on January 11, 2008.

Visible Changes

There are no visible changes associated with this project without configuration.

Once configured, there are visible changes on the *Add resume/CV* page of the Talent Gateway and the *Resume/CV* upload page for the Gateway Questionnaire (only if your organization uses Gateway Questionnaire).

Limitations and Known Interactions

This feature is available for all KRB/Talent Gateway languages that support auto-extraction: Dutch, English, French, German, Italian, and Spanish.

Best Practice Recommendations

None

Overview of Implementation

Kenexa personnel turn on this feature on behalf of clients for the Talent Gateway and Gateway Questionnaire.

KRB/TG User Experience

When this setting is enabled, candidates see a checkbox with the following label, “Override profile information based on newly uploaded resume?” at two points in their workflow:

- On the Add resume/CV page of a Basic, Full, or Referral Talent Gateway
- On the Resume/CV page of the Gateway Questionnaire.

Clients can elect to customize the label for this field, if desired; see the *Workbench 11 Release Notes* for more information.

Candidate Experience - Talent Gateways Block Submission of Forms with Blank Fields

This feature was available in Release 10.1 on August 31, 2007.

By default, a Talent Gateway creates a candidate form associated with a specific submission regardless of whether the candidate has filled out each *optional* field or not. In certain circumstances, recruiters would prefer that a candidate form not be created if the form still has important but optional data missing.

This is particularly true for sensitive data such as EEO information, which companies cannot require the candidate to submit. If the Talent Gateway through which the candidate submits his or her req-specific submission creates a candidate form, and the form is attached to the candidate's record, it gives the impression that the form data have been collected. Recruiters can see that forms are attached to the record, but are often restricted by user privileges appropriate to sensitive data from actually looking at the forms to see if they are complete.

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 *optional* fields are completed. (Candidates must complete required fields no matter what.)

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 "per field" basis.

When it is enabled, the candidate encounters the form in the course of applying to the job. Depending on the option selected, the candidate will have to complete either *all* of the optional fields that are required by the TG for form creation, or just *one* of the optional fields that are required for TG form creation. (There are "required" fields and there are optional fields that can be configured to be "required for TG form creation.")

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.

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.

Cost

There is no additional cost for this feature.

Availability

Release 10.1, August 31, 2007.

Visible Changes

There are no visible changes associated with this feature.

Limitations and 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.

Best Practice Recommendations

None

Overview of Implementation

This feature is configured by Kenexa.

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, please ask your Kenexa consultant for assistance with this feature.

Candidate Experience - TGs Notify Candidates about Duplicate Submissions

Candidates receive notification of duplicate submission prior to submission.



Benefits

Candidates can better track which jobs they applied to.

Cost

There is no additional cost associated with this feature.

Availability

Release 11

Visible Changes

Candidates will automatically see this message if they have already submitted an application for a job and try to submit one a second time.

Limitations and Known Interactions

None

Best Practice Recommendations

None

Overview of Implementation

This message displays automatically to candidates when the conditions are met.

Create Document / “Offer Letter” Feature

Document Templates

[New in Release 11]

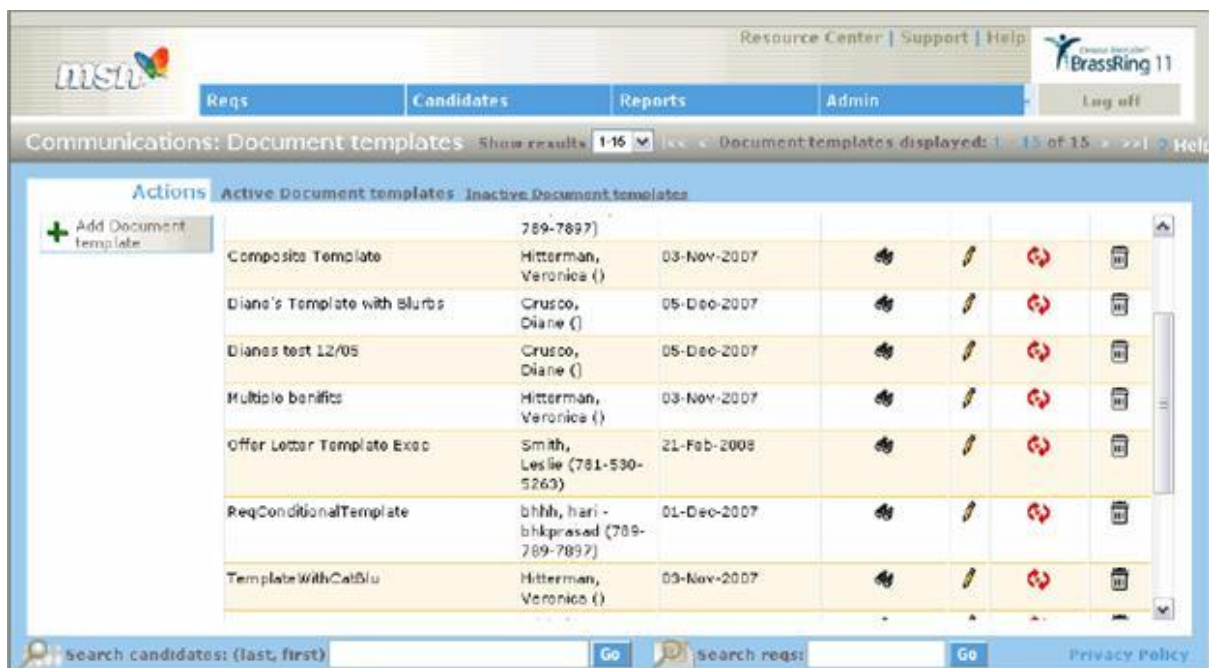
As of Release 11, users with the appropriate privileges can use document templates to create richly formatted documents for one or more specific candidates directly from the req folder or candidate’s Talent Record.

Administer Document Templates

Users with the Document templates – administer user type privilege can access the Document templates page. Users must have additional specific user type privileges to perform other actions on this page.

To administer document templates:

1. In KRB, select Admin > Communications > Document templates.
2. The Communications: Document templates page displays.



From the page you can do the following:

- View the list of Active Document templates in the grid
- Toggle to the list of Inactive Document templates. From the inactive document templates grid you can view, edit, activate, and delete document templates.

From the active document templates grid you can:

- View a document template
- Edit a document template
- Deactivate a document template
- Delete a document template

From the *Actions* menu you can:

- Add a document template

Add a Document Template

Users must have the *Document templates – add* user type privilege to add document templates. See the reference table for the *Add document / Edit document template* on page 197.

To add a document template:

1. In **KRB**, select *Admin > Communications > Document templates > Add document template* **OR** *Admin > Communications > Add document template*.
2. The *Add document template* window opens.
3. Enter the template name (50 characters maximum). This field is required. Use a name that indicates the template’s purpose. This field is required. Once the template is saved, you cannot change the name.
4. Use the text editor to compose the body of the document in the **DOCUMENT CONTENT** area. To work in a larger window, click the *Expanded view* link.
5. Select the *Merge* fields from the list and click *Add* to insert them into the **DOCUMENT CONTENT** area. Merge fields are “tokenized” when inserted into the body of the document template. Click *View text* to see how the merge tokens look when rendered as text in the document.
6. Select blurbs from the list of blurbs and click *Add* to insert them into the **DOCUMENT CONTENT** area. Blurbs are “tokenized” when inserted into the body of the document template. Click *View text* to see how the blurb tokens look when rendered as text in the document.
7. Create or finalize the contents of the document template: Arrange the text, merge token(s), blurb token(s), add punctuation, custom text, and so forth.
8. Select the *Org* groups authorized to create this document.
9. Select the *Org* groups authorized to administer this template.
10. Ensure that *Active document template* is set to *Yes* (the default) if you want this template to be active at this time.

11. Click save. A message confirms that the document template was saved successfully. The document template is added to the document templates grid.

Add Document Template Window

View a Document Template

Users must have the Document templates – administer and Document templates - add user type privilege to add document templates.

To view a document template:

1. In KRB, select Admin > Communications > Document templates.

2. In the document template grid, find the template you want to view and click its **View** icon to see the attributes of the template.
3. Click **OK** to close the view window when you are finished.

Edit a Document Template


Users must have the **Document templates – administer** and **Document templates - add** user type privilege to add document templates. See the reference table for the **Add document / Edit document** template on page 197.

To edit a document template:

1. Select **Admin > Communications > Document templates**.
2. Find the document template you want to change in the grid.
3. Click the **Edit** icon for it.
4. In the **Edit document template** window, change the document template as needed. See **Add a document template** on page 193 and the **Document template reference table** on page 198 for more details.
5. Click **Save** to save your changes.
6. The updated document template is stored in the document templates grid.

Reference Table: Document Templates

Field	Description
Added by	Edit document template only. The name of the user who created the document template in the format “First Last”. This format is reversed for the Japanese locale.
Added on	Edit document template only. The date on which the document template was created in the format “dd-mmm-yyyy”. The format is different for the Japanese locale.
Edited by	Edit document template only. The name of the user who last edited the document in the format “First Last”. This format is reversed for the Japanese locale.

Edited on	Edit document template only. The date on which the document template was last edited in the format “dd-mmm-yyyy”. The format is different for the Japanese locale.
*DOCUMENT CONTENT	<p>The configured content for the existing document template is contained in this section. You can change the text, formatting, add different merge fields, change existing merge tokens, and edit blurbs, and so forth, as desired.</p> <p>Click the expanded view link or the binoculars icon  to open a separate, larger window to work in.</p> <p>If you delete the content in this area and click Save, an error message is displayed. You must include document content to save the document template.</p>
Merge fields [token selection]	<p>Select tokens from a variety of KRB data sources and insert those tokens within the body of the document template.</p> <ul style="list-style-type: none"> ■ Candidate fields ■ Addendum (only if implemented by client) ■ All client configured candidate forms ■ Req standard fields ■ Req custom fields ■ User profile <p>When a variable group is selected from the list, the text area below will populate with the listing of applicable fields associated with that group.</p> <p>To access an expanded list view of the variable group list, a 'view' icon will appear to the right of the select list. When clicked, a “Selection details” screen will open in a new window through which the user will select a single variable group.</p> <p>To access an expanded list view of the individual variable group fields, a 'view' icon will appear to the right of the text area. When clicked, a “Selection details” screen will open in a new window through which the user may select any applicable fields to be inserted into the document content.</p> <p>6. Once a field (or fields) has been selected within this control, the user will click the “<< Add” action to insert that field into the document content area.</p>

<p>Insert blurb</p>	<p>Select one or more blurbs from the list and insert them into the DOCUMENT CONTENT section.</p> <p>For organizations with 200 blurbs or more, click the <i>List >></i> button to open a search box for blurbs.</p> <p>Slick <i>Selection details</i> to view the full list of blurb names and select each one through this screen if desired.</p> <p>Conditional blurbs are denoted with a “(c)” after the blurb name. Conditional blurbs are rendered in the generated document or e-mail only if the configured “condition” is met.</p> <p>Some blurbs are associated to a blurb category. Only one blurb from a given category may be executed within a document or e-mail or document. During document or e-mail generation, if more than one blurb from the same category appears within the underlying template, the system asks you to select which blurb should appear within the document or e-mail.</p> <p>Conditional blurbs which are also associated with a blurb category: The category name appears before the blurb name and a “(c)” value appears after it.</p> <p>Blurbs without category values are listed first followed by blurbs with category designations. Blurbs with category designations are sorted by category and then ordered by blurb name.</p>
<p>Add</p>	<p>When you click <i>Add</i>, the blurb name is inserted as a token into the DOCUMENT CONTENT area. If you haven’t selected a blurb and you click <i>Add</i>, an error message displays.</p> <p>If the selected blurb is associated with a blurb category, the blurb name token contains both the name of the blurb and the category name; for example, “[category name]blurb name”.</p> <p>When the document is generated, the blurb name is replaced with the appropriate blurb text.</p>
<p>View text</p>	<p>Click <i>View text</i> to view the blurb text prior to adding it to the template. The “View blurb text” screen opens in a separate window.</p> <p>If you haven’t selected a blurb and you click <i>View text</i>, an error message displays.</p>
<p>Org groups authorized to create document</p>	<p>This field is required. If you click <i>Save</i> and have not made a selection in this field, an error message pops up.</p> <p>Select one or more org groups from the list that will be permitted to create documents from this document template. This list contains the names of all active org groups for the client.</p>

	Once you make a selection for this field and save the setting, this document template is available in the <i>Select document template</i> dropdown list for users belonging to the org groups selected here and granted document creation privileges.
Org groups authorized to administer document	<p>This field is required. If you click <i>Save</i> and have not made a selection in this field, an error message pops up.</p> <p>Select one or more Org groups from the list that will be permitted to administer this document template. This list contains the names of all active org groups for the client.</p> <p>Once you make selections for this field and save the settings, this document template is available in the <i>Communications: Document templates</i> window for users belonging to the Org groups selected here and granted administration privileges.</p>
Active document template	Indicates whether the document template is active or not: Select <i>Yes</i> (the default) or <i>No</i> . You can change the setting of this field. When you click <i>Save</i> the template's status is changed from active to inactive or <i>vice versa</i> .
Save	Click <i>Save</i> to save the settings for the document template. The system performs validation checks on all required fields. Once all required fields are completed the template is saved to the database and a confirmation message is displayed, indicating that the document template was saved successfully.
Revert to Saved	Click <i>Revert to saved</i> to clear out any edits made to the existing template while on this page. The previously saved settings for this page are restored.
Cancel	Click <i>Cancel</i> to close the window without making any changes.

Deactivate/Reactivate a Document Template

To deactivate a document template:

1. In KRB, select *Admin > Communications > Document templates*. The *Active* view page displays automatically.
2. Locate the document template you want to deactivate in the document templates grid.
3. Click the *Deactivate* icon in its row.
4. Review the document template's attributes in the *Deactivate document template* window.
5. Click *Deactivate*. A confirmation message displays, indicating that the document template's status has changed.

Otherwise, click *Cancel* to close the window without making any changes.

To reactivate a document template:

1. In KRB, select Admin > Communications > Document templates. The Active view page displays automatically.
2. Click the Inactive link at the top of the page. The Inactive view page displays.
3. Locate the inactive document template you want to reactivate in the inactive document templates grid
4. Click the Reactivate icon in its row.
5. Review the document template's attributes in the Reactivate document template window.
6. Click Reactivate. A confirmation message displays, indicating that the document template's status has changed.

Otherwise, click Cancel to close the window without making any changes.

Delete a Document Template

To delete a document template:

1. In KRB, select Admin > Communications > Document templates.
2. Locate the document template you want to delete in the document templates grid.
3. Click the Delete icon in its row.
4. Review the document template's attributes in the delete document template window.
5. Click Delete. A message confirms that the document template was deleted successfully.
6. Click Close to close the existing window.
7. The Communications: Document templates window is refreshed and the deleted template is not longer listed in the Document templates grid.

Creating a Document Template Library

The initial steps for creating a library of document templates require research, planning, information assemblage, and content development. These steps take place outside of Kenexa Recruiter BrassRing.

1. The client enumerates the types and variations of routine communications with candidates, taking into account document purpose, branding, legal and regulatory requirements, and so forth.
2. Some individual(s) within the company have the job of developing and finalizing the standard content that will be included in different types of letters (such as offer letters).

The next several steps take place in Workbench and Kenexa Recruiter BrassRing.

1. One or more Certified Workbench Users is responsible for creating blurb categories in Workbench.
2. One or more KRB users with the appropriate user type and Org Group privileges creates repositories of blurbs, organized by blurb categories.
3. One or more KRB users with the appropriate user type and Org Group privileges creates company-wide templates for standard letter documents and standard e-mails.
4. Groups within the organization could perform all of these steps at the group level as well, to meet group-specific needs (or needs organized around a different priority).

Individuals can also make their own templates and blurbs for communications that they have to send regularly. These might be based initially on group and/or company-wide templates and blurbs to which these individuals add content specific to their interactions with candidates.

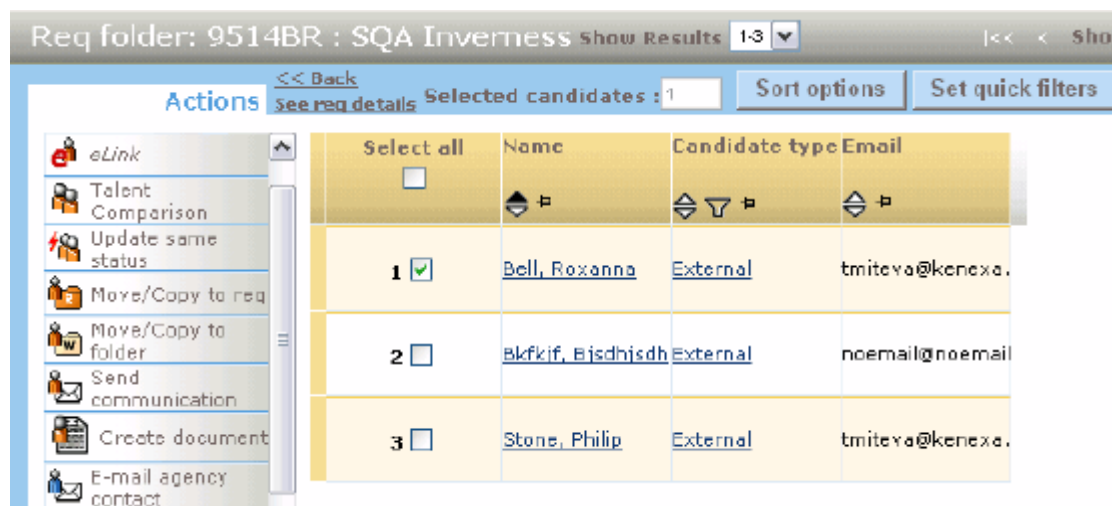
Create a Document

Kenexa introduces robust “Create document” functionality in Kenexa Recruiter BrassRing 11. KRB users with the requisite privileges can create complex, candidate-specific documents, such as offer letters, from within a req folder or from the Talent Record using pre-assembled document templates.

Users can build a document on the fly, save it as a PDF, attach it to the candidate’s Talent Record, and send it immediately as an e-mail attachment to the candidate. Document templates may contain text, HTML, graphics, merge fields selected from candidate forms and requisitions, blurbs, and attachments such as req and candidate forms.

Create a Document from within a Req Folder

When working in a req folder with one or more candidates, KRB users can create documents such as offer letters from the Actions menu. Users must have the “Create document – enable” user type privilege to see this menu option. Users cannot create documents using this functionality from within working folders, the Inbox, or Search results.



To create a document for a candidate from within a req folder:

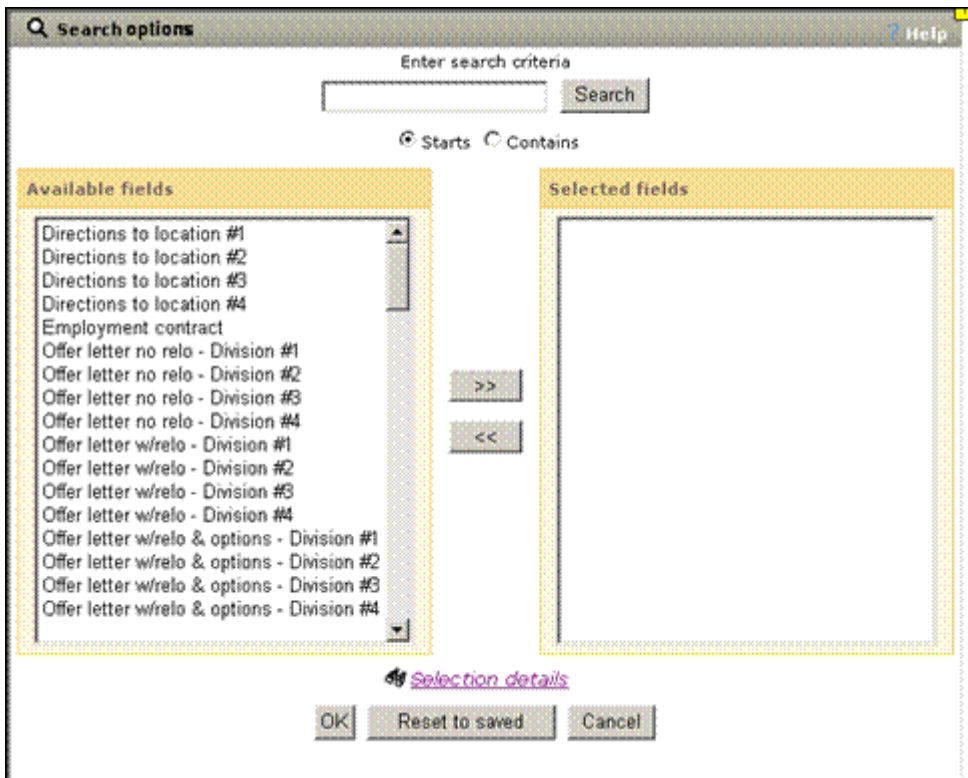
1. In KRB, navigate to the req folder.
2. Select the check box for the candidate for whom you are creating the document.
3. Click **Create document** in the **Actions** menu.
4. The template selection **Create document for <Candidate name>** window opens.
5. You will have access to templates available to your org group membership. Select a document template from the dropdown list and click **Go**.



If your organization has created large numbers of templates (over 199), click the **List >>** button beside the **Select document template** field to open the **Search options** window.

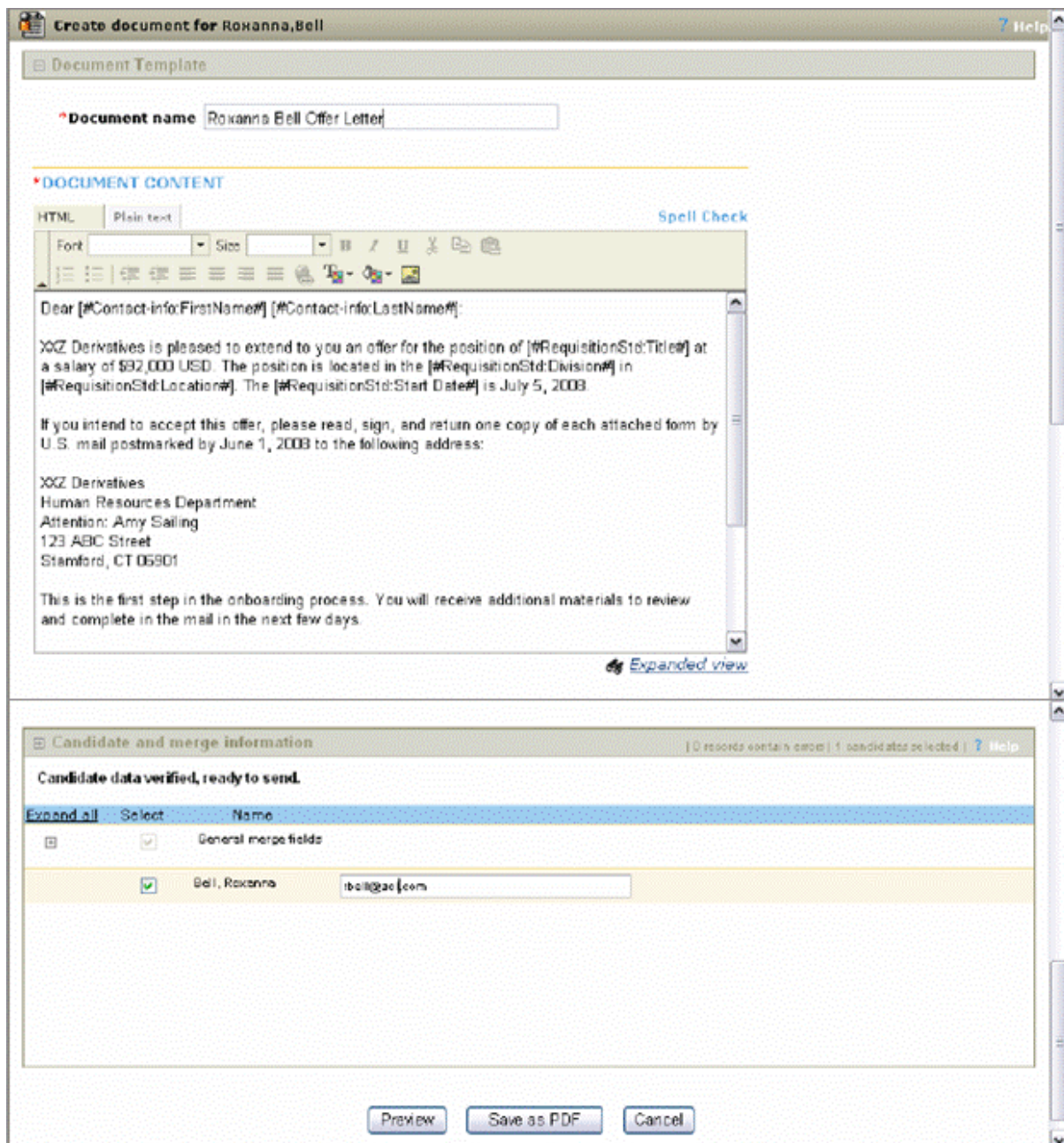
To select a template from a **Search options** window:

- a) Enter search criteria in the search box and click **Search**.
- b) Alternatively, scroll to and select a template from the **Available fields** list. You can select only one (1) template.
- c) Click **Add** to move it to the **Selected fields** list.
- d) Click **OK**.



6. Once you have selected the template and clicked Go, the full Create document for <Candidate name> window opens. The document contains all the pre-configured contents from the document template you selected.

Create Document Window for Roxanna, Bell



7. Enter additional text if desired. Users with the appropriate user privileges can edit elements of the document if desired.
8. Add or correct missing information in the Candidate and merge information section if necessary.
9. Click Preview to see the rendered content of the letter with all tokens instantiated.

Bell, Roxanna Candidate 1 of 1 [Help](#)

Dear Roxanna Bell:

XXZ Derivatives is pleased to extend to you an offer for the position of SQA Inverness at a salary of \$92,000 USD. The position is located in the SEARCH AGENCY-PROCUREMENT SERVICES (102) in Nashua, NH. The March 31, 2008 is July 5, 2008.

If you intend to accept this offer, please read, sign, and return one copy of each attached form by U.S. mail postmarked by June 1, 2008 to the following address:

XXZ Derivatives
Human Resources Department
Attention: Amy Sailing
123 ABC Street
Stamford, CT 06901

This is the first step in the onboarding process. You will receive additional materials to review and complete in the mail in the next few days.

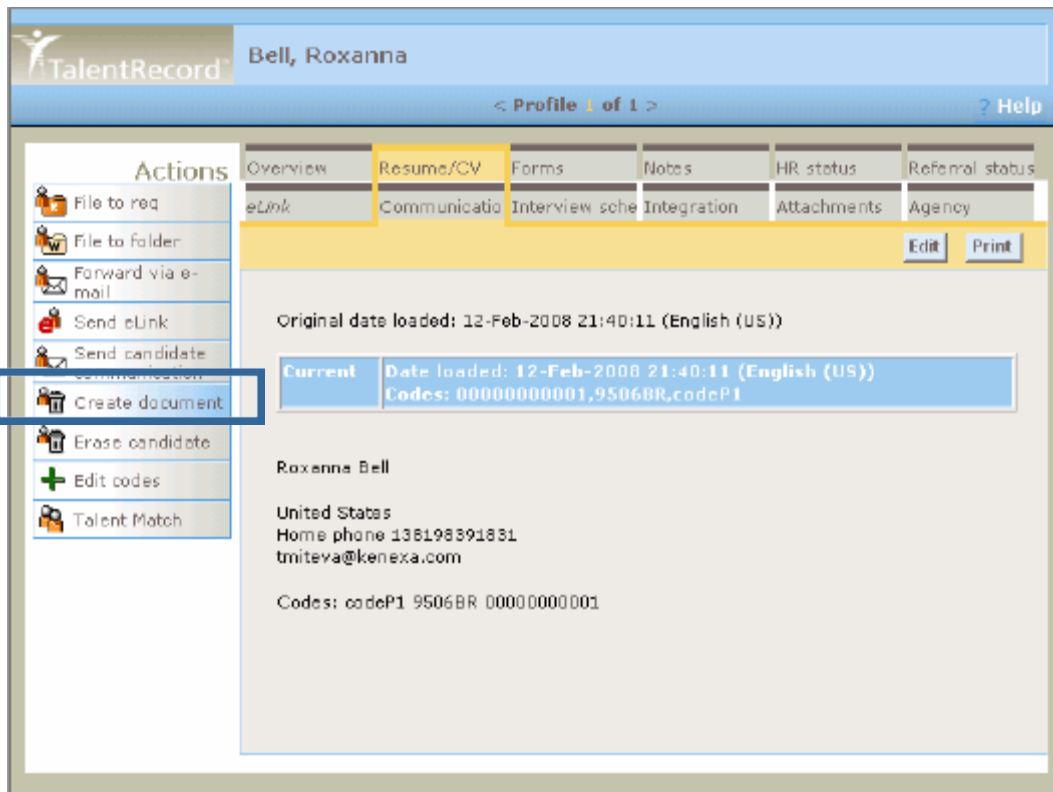
Sincerely,
Amy Sailing

XXZ Derivatives
Stamford, CT 06901
Phone: 555.530.5000
Direct: 555.530.5221
Fax: 555.530.5500
www.xxz.com

10. When you are finished creating or editing the document, click Save as PDF.
11. The PDF is saved as an attachment to the candidate's Talent Record.
12. The next step is to create an e-mail to send to the candidate and attach the document to the e-mail.

Create a Document from the Talent Record

Users with the Create document – enable privilege can create a document from within the candidate's Talent Record as long as it is from within a req folder.



Reference Table: "Create document" Window

Field	Description
Document name* [New in Release 11]	<p>Through this field, the user will name the document. When the document is saved as a PDF to the candidate's talent record, the name entered in this field will appear as the attachment name.</p> <p>Required. Need it to save the document. If no name, error message upone save.</p> <p>Character limit for text box = 50.</p>
DOCUMENT CONTENT* [New in Release 11]	<p>Within this section, the configured content for the existing document template will be displayed. The user may modify the existing text and formatting.</p> <p>Within this section, the text, formatting, tokens and blurbs configured within the selected document template will appear and may be edited by the user, as applicable.</p> <p>An 'Expanded view' hyperlink with binocular icon will appear at the bottom right corner of the document content. When this link is clicked, a new window will open containing a larger version of the document content portion of the page.</p> <p>If no document content has been specified (this would mean that the template content was deleted) and the Preview or Save as PDF button is clicked, return a small pop-up error with centered ok button. Error text = "Please correct the following: 'DOCUMENT CONTENT' is mandatory."</p>

	Clicking OK will return focus to the “DOCUMENT CONTENT” field. If multiple errors exist on the page, these will all be listed in a single error pop-up in sequential order and when OK is clicked, focus will be returned to the first field/control which contains an error. (The 'Please correct the following:' text should only appear once per error pop-up.)
Candidate & merge information section	Users may provide missing data, and, if desired, edit blurbs and/or deselect candidates.
[New in Release 11]	When the candidate and merge information is verified and no data are missing the text above the information grid is “Candidate data verified, ready to create document”.
Preview	Users can click this icon to preview how the generated document appears with all token information instantiated.
Save as PDF	Users can click this button to save the text within the DOCUMENT CONTENT section to the candidate’s Talent Record as a PDF on the Attachments tab. The File name is the document name, the Attachment category is “None,” and the Source is “KRB.” The screen refreshes and displays a confirmation message and the Preview document screen opens in a new window.
Cancel	Click Cancel to close the window without making any changes.

Candidate and Merge Information Area

The Candidate and merge information area contains the count of missing data and the number of candidates selected.

A red flag signifies that data or attachments are missing: Blurb data, merge data, or attachments for specific candidates.

You must leave at least one (1) candidate selected to save the document as a PDF. If you inadvertently deselected all candidates in the Candidate and merge information section, an error message displays.

You must also correct all the missing information before clicking Save as PDF. Otherwise, an error message displays prompting you to review and correct the missing information.

Create Document Window with Unresolved Candidate and Merge Information

Conditional

The screenshot displays two main windows. The top window, titled "Create document for Alexander,Nash", shows a document template with various merge tokens. A red arrow points to the token `{#blurb-Openers.Delighted}{#blurb-Openers.Excited#}`. The bottom window, titled "Candidate and merge information", shows a table of candidate data.

Document Template Content:

Document name:

DOCUMENT CONTENT

HTML Plain text Spell Check

Font: Size: **B** *I* U

Dear: {#Contact-info.FirstName#} {#Contact-info.LastName#}

{#blurb-Openers.Delighted}{#blurb-Openers.Excited#}

Your annual salary is: {#Offer.Salary#}

{#blurb.Benefits#}

{#blurb.Relocation#}

To accept our offer, please sign and fax the attached employment contract within the next five business days.

Please feel free to contact me if you have any questions or concerns.

Sincerely,

{#User-info.FirstName#} {#User-info.LastName#}

[Expanded view](#)

Candidate and merge information 10 records contain unapplied candidate attachments

Candidate data verified, ready to send.

Expand/Collapse	Select	Name	Category name	Blurb name	Cost Based?	Select Blurb	Edit
	<input type="checkbox"/>	Blubs		Benefits	No		
				Relocation	Yes		
	<input type="checkbox"/>	Openers		Blurb selection required	No	Select blurb	Edit
	<input type="checkbox"/>	Openers		Blurb selection required	Yes	Select blurb	Edit
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Nash, Alexander					

When blurb tokens, merge tokens, and/or candidate attachments are included in a Document template, the Candidate and merge information area displays a total count of and a list of the data included in the document.

Reference Table: Candidate and merge information Area

Field	Description
-------	-------------

Expand all	Click the Expand all link or the plus sign box to expand each section of the Candidate and merge area. Click the Collapse all link or minus sign box to do the opposite.
Select box	The check box is automatically selected for blurbs, general merge fields, and forms added to the document. To remove an item from the document, such as an incomplete form, de-select the check box for it.
Name	
Blurbs	The section contains the list of each blurb included in the generated document, coming from the document template.
General merge fields	<p>This section contains merge data which is generic for the document template, and does not pertain to specific candidates. You cannot de-select individual items listed under General merge fields.</p> <ul style="list-style-type: none"> ■ Select form: Because you can create documents only for a candidate already filed to a req folder, that is, against a specific requisition, the Select form radio button is selected and inactive for merged req fields. ■ Form title: The name of the req (including Req ID and title) or the token category name (like “User profile”). This is a hyperlink to a new window containing the form/admin page. The user must have the appropriate privileges to view and edit the missing information. ■ Date/time edited: The date and time the form information was last edited. ■ Edited by: The name of the user who last edited the form. ■ Missing fields: The number of data elements missing from that merge category. ■ Edit link: Click this link to open the admin page or form in a separate window where you can update the missing information and save it. You must have the appropriate user type privileges to be able to perform this edit on either the admin page or the form.
Forms [Candidate-specific merge fields]	<p>This section contains missing merge data for each specific candidate.</p> <ul style="list-style-type: none"> ■ Select form: If the template includes data from a specific form, and the candidate has multiple instances of a specific form field (meaning the candidate filled out the form more than once and has different answers for this field in the different instances of this form), you must select a specific instance of the form field as the merge field. ■ Form title: The form title is a clickable hyperlink when the form exists. Click the link to view the form in a separate window. You must have the appropriate user privileges to view and edit the missing information.

- **Date/time edited:** The date and time the form information was last edited. If the form does not exist for the candidate, the column displays “Form Not Found.”
- **Edited by:** The name of the user who last edited the form. If the form does not exist for the candidate, this column is blank.
- **Missing fields:** The number of data elements missing from that merge category. If the form does not exist for the candidate, this column is blank.
- **Edit link:** Click this link to open form in a separate window where you can update the missing information and save it. If the form does not exist for the candidate, you can click the Add form link. You must have the appropriate user privileges to add the form.

Example with No Missing Information

In this example, there is no missing information and each section is expanded.

Candidate and merge information		10 records contain errors 1 candidates selected Help			
Candidate data verified, ready to send.					
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Blurbs			
		Category name	Blurb name	Conditional?	Select Blurb
		Package	Package Blurb 1	No	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	General merge fields			
		Select form	Form title	Date/time edited	Edited by
		<input type="radio"/>	9514BR : SQA Invoicing	21-Feb-2008 16:00:05	Smith, Leslie (781-530-5253)
<input checked="" type="checkbox"/>		Bell, Roxanna <input type="text" value="tmitova@kenexa.com"/>			

Creating a Standard Offer Letter

Your organization’s workflow for creating the standard Offer letter packet will be company- or group-specific. The suggested workflow for creating the blurbs and templates for the standard offer letter is provided in this document as a guideline.

1. The designated individual(s) in your company or group identify and diagram content to be included in the standard offer letter.
2. One or more KRB user(s) create blurbs and other content that will be included in standard Offer letters. The types of content that might be included are branding information,

boilerplate disclaimer text, legal text, conditional text, merge tokens, opening statement, closing statement, and so forth. Some of the content to be included in the Offer letter document template might have been created at other times for other purposes, but will be available for your use in the Offer letter document template.

3. Working in KRB, your site's template creator (the user who has the responsibility and privileges to create document templates) creates the Offer letter document template which in the KRB Communications Module. This template includes all the items created in Step 2 specifically for the Offer letter document template.

4. Your site's template creator or the KRB user creates an e-mail template. This is a template for the standard e-mail communication which accompanies the attached offer letter.

Once saved, the Offer letter document template and the accompanying Offer letter e-mail template are available for use by KRB users (subject to user type and Org Group membership).

Creating and Sending Individual Offer Letters

This section describes the procedure for creating and sending an offer letter to a candidate by using the Create document feature and the Send communication feature from within a req folder. The procedure assumes that an "offer letter" document template has been created, an "offer letter" e-mail template has been created, and both are available for selection.

To create an offer letter:

1. Navigate to the req folder to which the candidate is filed.
2. Select the check box for the candidate for whom you are creating the document.
3. Click **Create document** in the **Actions** menu.
4. Select the "offer letter" template for the document and click **Go**.
5. In the **Create document** text editor, edit the generic offer letter as needed. For example, verify that the correct merge tokens are present and insert blurbs and other text if desired.
6. Click **Save as PDF**.
7. The document is automatically attached to the candidate's Talent Record on the **Attachments** tab.

To create the e-mail to which the offer letter is attached:

1. Once again on the from within the Req folder, ensure that the check box for the candidate is selected.
2. Click **Send [candidate] communication** in the **Actions** menu.

3. Select the “Offer letter” e-mail template. The typical offer letter e-mail template informs the recipient that the official offer letter is attached to the communication.
4. In the Upload attachments area of the Send communications window, browse to and select the offer letter document attached to the Talent Record and click Upload.
5. Correct missing candidate and merge information if necessary.
6. Check the Notify me when this form is submitted check box if desired.
7. Preview the e-mail if desired.
8. Click Send to send the e-mail to the candidate.
9. The e-mail is sent and the event is logged in the candidate’s Communications history.

Communication - Saved Correspondence

With Release 11, clients can elect to save a read-only copy of the content of all eLinks, interview schedule emails, e-mail correspondence, and letter correspondence, and access them from the candidate's Talent Record.

When these settings are enabled, Kenexa Recruiter® BrassRing saves a read-only copy of the content of the following types of candidate communications:

- All eLinks
- All interview schedule emails
- Any e-mail correspondence generated from an email template that has the Saved correspondence setting set to Yes
- Any letter correspondence generated from a letter template that has the Saved correspondence setting set to Yes

Benefits

Allows clients to store copies of the actual correspondence sent to candidates and access that correspondence from the Talent Record.

Cost

There is a cost associated with this feature. Please contact your Kenexa representative for more information.

Availability

Release 11

Visible Changes

There are no visible changes without Workbench configuration

Limitations and/or Known Interactions

This saved correspondence capability applies to candidate communications only.

Users can access “saved correspondence” from within the Talent Record.

Users cannot search “saved correspondence.”

“Saved correspondence” will be saved for five (5) years. Your organization can use the Saved Correspondence feature in conjunction with Candidate Purge and Req Purge. Please contact your Kenexa consultant for more information.

For letter correspondence, the saved copy is that which is rendered at the time the letter is generated. If changes are made after the letter is generated, those changes are not reflected in the saved copy.

Overview of Implementation

The major configuration steps for the “Saved correspondence” feature are:

1. Configure the client settings: Communications history stored
2. Configure user type privileges. The two privileges are:
 - View all stored communication history
 - View stored communication history for my reqs only

Users with the appropriate privileges can use the feature within in KRB.

User Experience: Kenexa Recruiter BrassRing

This section describes the changes and additions KRB users will see in several KRB application pages in Release 11.

Add/Edit Letter Template Page

To see the two new settings for Add letter template and Edit letter template pages, the client setting Communications history stored must be set to Yes and the KRB user must have the appropriate privileges for adding and/or editing Letter templates.

Setting	Description
Require letter creation from within a req folder	Yes = requires creation of the letter from within a req folder No (the default) = letter can be created from anywhere in the system
Save copy of correspondence	Yes = copy of the correspondence created with this letter template will be saved No (the default) = copy correspondences created with this letter template will not be saved

Add new letter template page

Add / Edit E-mail Template Page

To see the new setting for Add e-mail template and Edit e-mail template pages, the client setting Communications history stored must be set to Yes.

Setting	Description
Save copy of correspondence	Yes = copy of the correspondence created with this e-mail template will be saved
	No (the default) = copy correspondences created with this e-mail template will not be saved

Add/Edit E-mail Template Page

Insert blurb Add [Expanded view](#)

Upload attachments

File	File size	Delete
No attached files		

Org groups authorized to send this e-mail

Test Org Group

[Selection details](#)

Org groups authorized to administer this e-mail

Test Org Group

[Selection details](#)

Active e-mail template

Yes No

*** Agency**

Yes No

Save copy of correspondence

Yes No

* = required field

Talent Record Communications Tab – Saved e-mail and Letter Correspondence: For appropriately privileged users, the item listed in the Communication column links to a read-only version of the generated correspondence.

TalentRecord™ Boese, Kevin

< Profile 1 of 1 > [Help](#)

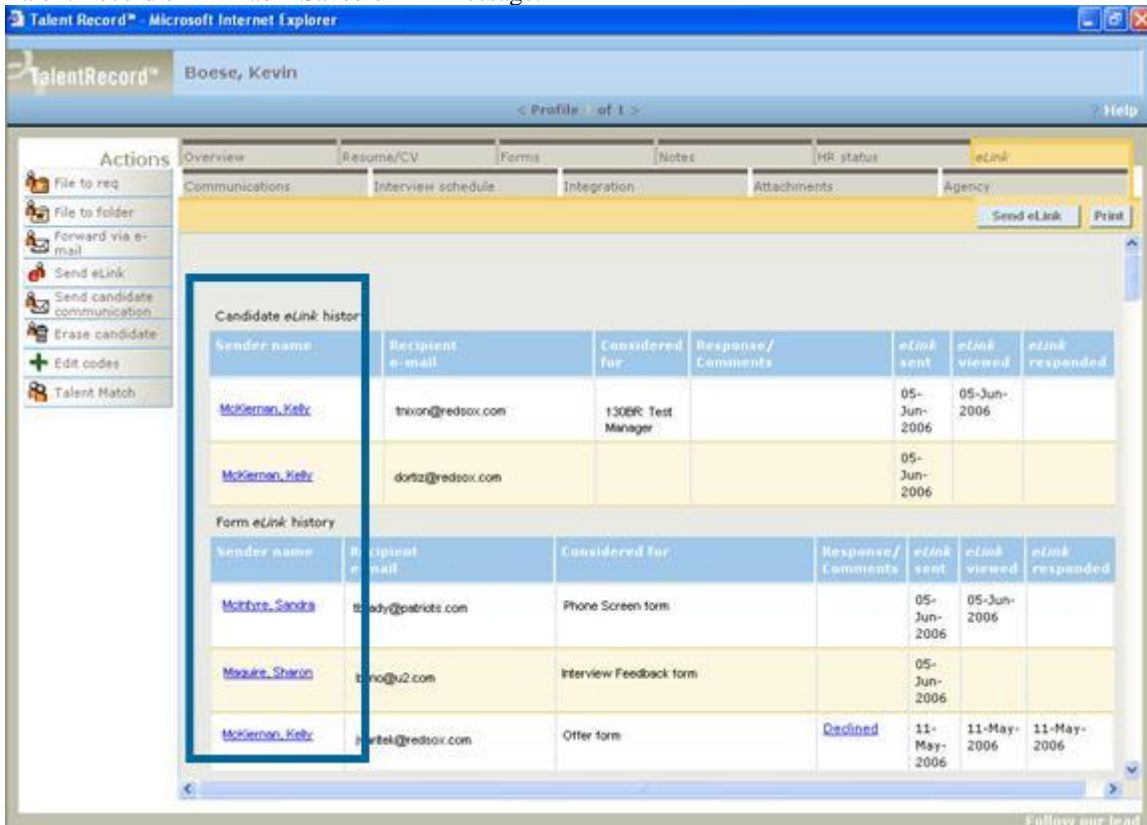
Overview | Resume/CV | Forms | Notes | HR status | eLink

Communications | Interview schedule | Integration | Attachments | Agency

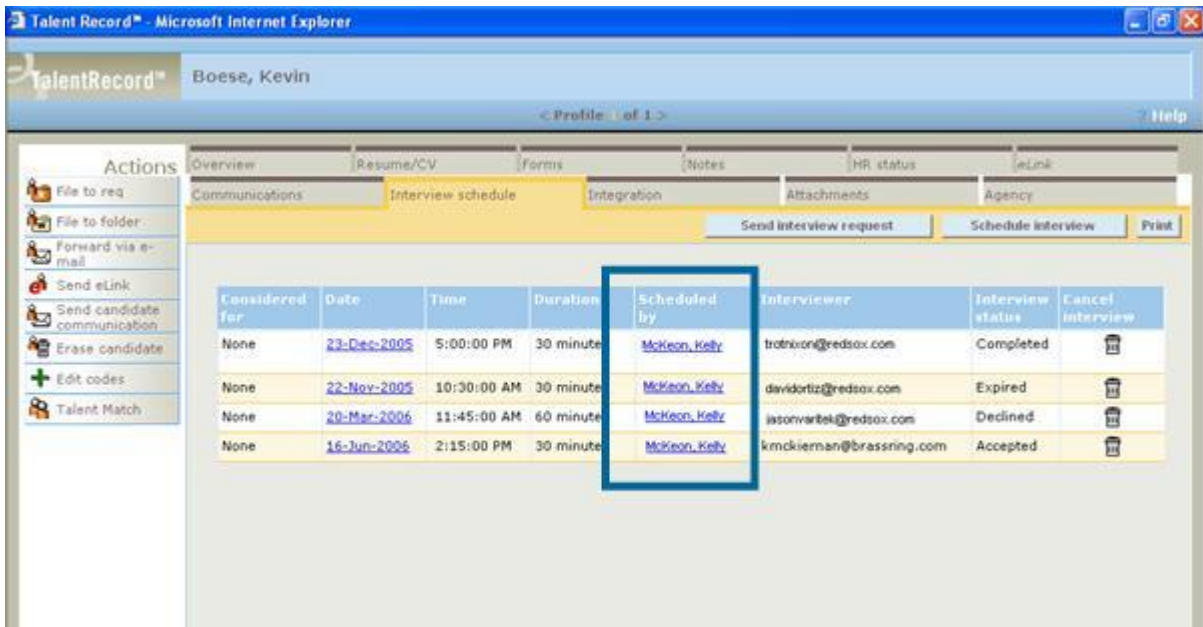
Communication History

Date sent	Folder type	Req ID	Folder	Communication	Type	Sent by	Status
02-May-2006		130BR-Test Mgr	Test Manager	Offer Letter	Letter	McKiernan, Kelly	Sent
26-Apr-2006		-	McKiernan, Kelly	Marketing Campaign	Email	McKiernan, Kelly	Sent
26-Apr-2006		-	McKiernan, Kelly	Interview reminder	Email	McKiernan, Kelly	Sent

Talent Record eLink Tab – Saved eLink Message:



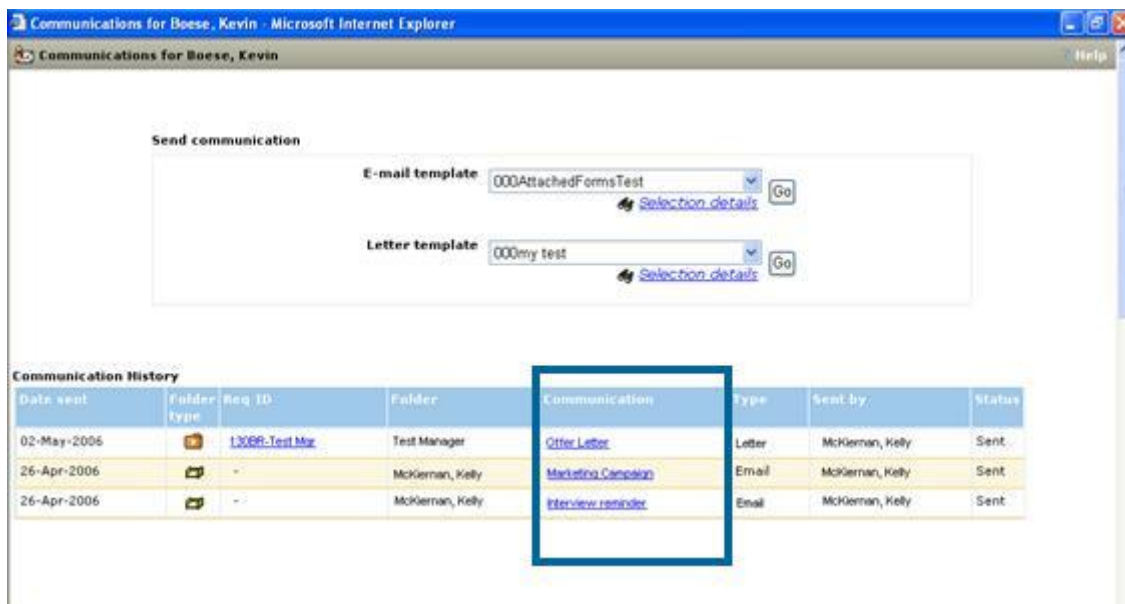
For appropriately privileged users, the sender's name listed in the Sender name column links to a read-only version of the eLink message.



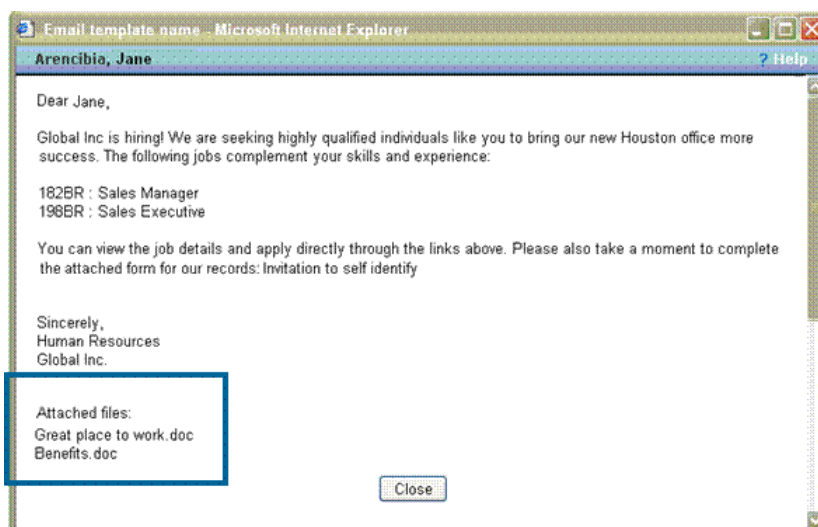
Interview Schedule – saved message

For appropriately privileged users, the sender's name listed in the Scheduled by column is a link to a read-only version of the interview schedule message.

Communications History – saved email and letter correspondence



For appropriately privileged users, the communication name listed in the communication column is a link to a read-only version of the generated correspondence



Viewing saved correspondence

A read-only version of the generated correspondence displays. Any information that was hyperlinked in the original doc displays as non-hyperlinked and read-only.

Communications Module Enhancements

Kenexa Recruiter BrassRing has expanded the Communications Module to include a new document-creation feature while working with candidates within req folders or directly from the candidate's Talent Record. The module also includes improved blurb functionality and additional communications tasks supported by more differentiated user privileges.

Release 11 includes:

- A revised KRB “Communications” menu
- “Create document” functionality supported by:
 - A new Document template creation feature
 - A new Document template administration feature
- Enhanced Blurb functionality
 - Blurb categories (configured in Workbench by Kenexa personnel or Certified Workbench Users)
 - New blurb-selection section within documents and e-mails
 - Blurbs can include tokens
 - Blurbs can be conditional
 - Blurbs can be user-selectable
 - Blurbs are themselves “tokenized”
 - Clients can confer selective access to change blurbs through user and org group privileges
- Enhanced “upload attachment” capability within e-mail communications
- Clients can control more precisely which users have access to specific functions within the Communications Module through several new user type privileges:
 - Blurbs - add
 - Blurbs - administer (name change)
 - Blurbs - delete
 - Create document - enable
 - Document templates - add

- Document templates - administer
- Document templates - delete
- E-mail templates - add
- E-mail templates - delete

There are new and changed Workbench user type privileges for administering blurb categories.

Benefits

KRB users can quickly assemble e-mails and letters that contain the required content and attachments, all from within the req folder working right at the candidate's Talent Record. For example, KRB users can assemble and send an offer letter to a desirable candidate without missing a beat. A copy of the document, any accompanying e-mails, and the history of the communications with the candidate are stored on the Talent Record.

Using the extended "blurb" functionality, clients can create a library of standard paragraphs containing legal text, disclaimers, and other kind of boilerplate content that is used repeatedly within documents. Clients can pre-assemble standard document and e-mail templates and assign user type and org group privileges that prescribe which templates users can work with and modify.

Cost

There is no additional cost for this feature. There are additional costs for procuring technical services to assist with template creation or updates to use new features.

Availability

This feature is available in Release 11.

Visible Changes

There are visible changes associated with this feature. The changes are described in details in the next several sections.

Limitations and Known Interactions

The "Create document" feature does not support:

- Sending an offer letter document out for approval via eLink

- Suppressing conditional blurb tokens within document or e-mail content when a condition is not satisfied
- The ability for candidates to approve or decline an offer letter from within the e-mail communication

Overview of Implementation

The major steps for using this new functionality are:

Note: Clients may purchase technical assistance for updating communications templates and blurbs. Please contact your Kenexa representative for more information.

1. Kenexa personnel or Certified Workbench Users:

- Enable new Communications privileges for the appropriate user types.
- Enable Admin+ Org group privilege for user type or user creating Org groups if necessary.

Kenexa personnel or Certified Workbench Users:

- Add blurb categories.
- Manage blurb categories in general.

For the first two steps above, see the Workbench 11 Release Notes or the Workbench Manual (available April 6, 2007 as online Help in Workbench and as a PDF file on the Resource Center).

2. Kenexa personnel or KRB users with Admin/Admin+ and Communications privileges:

- Create or update your organization's blurb "library":
 - ▲ Review existing blurbs.
 - ▲ Plan updates and additions to blurbs in light of new functionality (tokenization of blurbs, the addition of conditional blurbs, user-selectable blurbs, more specificity in user privileges related to blurb and template actions, and so forth)
 - ▲ Add new blurbs.
 - ▲ Edit existing blurbs.
 - ▲ Manage blurbs in general.
- Create a document template library:
 - ▲ Plan document templates.

- ▲ Add document templates.
 - ▲ Manage document templates in general.
 - Create an e-mail template library:
 - ▲ Review existing e-mail templates.
 - ▲ Plan updates and additions to e-mail templates.
 - ▲ Add e-mail templates
 - ▲ Edit existing e-mail templates
 - ▲ Manage e-mail templates in general
 - Create a letter template library:
 - ▲ Review existing letter templates.
 - ▲ Determine if document templates can replace some letter templates.
 - ▲ Plan updates and additions to letter templates.
 - ▲ Add letter templates [updated procedure].
 - ▲ Update letter templates.
 - ▲ Manage letter templates in general.
3. KRB Users do the following tasks based on the combination of their user type privileges and their org group assignment (which determines template access):
- Create documents from within req folders or from the Talent Record
 - Create e-mails using the Send communication action.
 - Create letters using the Send communication action.
 - Documents (such as an offer letter) using a pre-configured document template containing blurbs, text, and other data.
 - E-mails (such as the e-mail to which the offer letter is attached) using pre-configured e-mail template containing blurbs, text, and other data.

KRB User Experience

KRB user experience of the changes to the Communications module vary with each user's role and assigned user type privileges.

Assuming the appropriate privileges:

- Clients and individual users can create and administer standard paragraphs (“blurbs”) for use in e-mail templates and document templates.
- KRB users can create letter, e-mail, and document templates from within the Communications module.
- KRB users can create letters and e-mails using the Send communication action or from the Communications menu (as in earlier releases).
- KRB users can create documents from within a Req folder.

Revised KRB Communications Menu

The *Communications* sub-menu in KRB includes several new and changed items. Access to all menu items is restricted by user type privileges with more specificity. To access the *Communications* sub-menu, select *Admin > Communications* in KRB.

Admin	
Change password	
Edit my account	
Resume/CV transmittal form	
Welcome screen admin	
Personal e-mail lists	
Posting interface defaults	
Communications	Batch letters
Admin+	Add letter template
	E-mail templates
	Add e-mail template
	Document templates
	Add document template
	Blurbs
	Add blurb

The new *Communications* sub-menu includes the following items:

- Batch letters [unchanged] – for administering letter templates
- Add letter template [updated for R11]
- E-mail templates [changed for R11] – for administering e-mail templates
- Add e-mail template [changed for R11]
- Document templates [new in R11] – for administering document templates
- Add document template [new in R11]
- Blurbs [changed in R11] – for administering blurbs
- Add blurb [new in R11]

The table below describes the changes and additions to the *Communications* sub-menu in more detail.

Menu Item	Description
Batch letters	This is an existing menu item. Users must have the user type privilege Batch letters - administer all to see this menu item.
Add letter template	This is an existing menu item. Users must have the user type privilege Letters – add templates to see this menu item.
E-mail templates	This is an existing menu item. Users must have the user type privilege E-mail templates – administer to see this menu item.
Add e-mail template [changed in R11]	This is an existing menu item. Users must have the E-mail templates – add user type privilege to see this menu item.
Document templates [New in R11]	This is a new menu item. Users must have the Document templates – administer user type privilege to see this menu item. Clicking this menu item launches the Document template administration page.
Add document template [New in R11]	This is a new menu item. Users must have the Document templates – add user type privilege to see this menu item. Clicking this menu item launches the Add document template window.
Blurbs	This is an existing menu item. Users must have the Blurbs – administer user type privilege to see this menu item.
Add blurb [New in R11]	This is a new menu item. Users must have the Blurbs – add user type privilege to see this menu item. Clicking this menu item launches the Add blurbs window.

Standard Paragraph (“Blurbs”) Functionality Overview

Users can create a repository of blurb paragraphs which can be used in e-mail and document templates. Blurbs can be blocks of text that used repeatedly such as a privacy policy, disclaimer text, and so forth.

Blurbs have the following attributes:

- Blurbs can be user-selectable:
 - Blurbs can be included in templates and not available for selection by KRB users. Alternatively, blurbs can be selected for use by KRB users when they are creating/editing a document or e-mail.
 - Blurbs that are selectable by users must have a blurb category. Kenexa personnel or Certified Workbench Users create blurb categories in Workbench.

- Blurbs without categories are listed before blurbs with categories.
- Once a blurb is selected, whether it is for a document or e-mail template, or for a document or e-mail (in the case of user-selectable blurbs), it is inserted into the body of the document or e-mail as a token. The token format is “[#Blurb-<category name>:<blurb name>#]”. When the document or e-mail is generated, the blurb name is replaced with the appropriate blurb text.
- Blurbs can be conditional.
- Blurbs can be hidden for certain user types
- Blurbs can be hidden for certain org groups, which controls access to different types of templates

Administer Blurbs

The Communications: Blurbs page includes new grid columns reflecting the extended blurb functionality. To access this page, select Admin > Communications > Blurbs in KRB.

Actions		Active blurbs	Inactive blurbs
+ Add blurb	Save as new	<input type="radio"/>	<input type="radio"/>
		AnotherBenefit	Benefits No HItberman, Veronica 03-Nov-2007
		Blurb_With_Merge_Fields	No HItberman, Veronica 02-Nov-2007
		BlurbWithCat	Benefits No HItberman, Veronica 03-Nov-2007
		CandidateConditional2	Yes bhth, hari - bhkprasad 01-Dec-2007
		CandidateConditionalBlurb	Yes bhth, hari - bhkprasad 30-Nov-2007
		Executive Package	Package No HItberman, Veronica 03-Nov-2007
		No Allow; Conditional yes	Package Yes Gold, Abigail 15-Nov-2007
		No Allow; Conditional yes 2	Yes Gold, Abigail 15-Nov-2007
		PORTRAIT: Affäre der CSU wird "zur Stunde des"	No D'Souza2, Cecilia2 16-Jan-2007
		ReqCusConditional2	Yes bhth, hari - bhkprasad 01-Dec-2007
		ReqCusConditionalBlurb	Yes bhth, hari - bhkprasad 01-Dec-2007
		ReqStdConditionalStaticBlurb	Yes bhth, hari - 30-Nov-2007

On the Communications: Blurbs page, users can take the following actions from the Actions menu:

- Add a blurb: This is an existing action on the Communications: Blurbs page. Users must have Blurbs – add user type privilege to see this action.
- Save a blurb as new: [New in R11] Users can select a blurb in the grid and click Save as new in the Actions menu to create a new blurb based on a previously created blurb. Users must have the “Blurbs – add” user type privilege to see this action. Clicking Save as new opens the Save as new blurb window.

On the Blurbs grid, users can:

- Select individual blurbs listed in the grid and take actions on them, such as viewing them, editing them, deactivating them, and deleting them.
- See information about the blurb’s attributes, such as the category assigned to the blurb and whether or not the blurb includes conditional logic.

Column	Description
Category [New in R11]	<p>The category the blurb belongs to. Users can click the <code>Category</code> to toggle between sorting in descending and ascending order (the default).</p> <p>Category names are in the user’s locale. If the category is not translated in the user's locale, the category name will appear in the base locale for the client.</p> <p>For all blurbs created prior to R11, the <code>Category</code> column is blank. You must explicitly select a category for blurbs that existed prior to Release 11.</p>
Conditional? [New in R11]	<p>Indicates if conditional logic is being used within this blurb. The value for the <code>Make blurb conditional?</code> setting is listed in this column. The valid values are <code>Yes</code> and <code>No</code> (the default setting).</p> <p>For all blurbs created prior to R11, this column will be set to <code>No</code> until the blurb is modified and the setting value is changes.</p>
Delete blurb column	This is an existing column in the Blurbs grid. Users must have the <code>Blurbs – delete</code> user type privilege.

Limitations and Known Interactions

As of Release 11, Blurbs are represented by tokens in e-mail and document templates; they are no longer simple text strings. Because blurbs are represented by tokens, you cannot edit them directly from within the template. The token format is “[#Blurb-<category name>:<blurb name>#]”. When the e-mail is generated, the blurb name is replaced with the appropriate blurb text.

To use the enhanced blurb functionality, your organization must remove the simple text within existing blurbs and replace it with the appropriate blurb tokens. Please contact your Kenexa consultant for assistance in updating your blurb library.

Users with appropriate privileges can access an “edit” link from within a document or e-mail template that are part of the “create document” functionality accessed from within req folders. You can also edit blurbs through the Communications: Blurbs grid.

Add a Blurb

To add a blurb:

1. In KRB, do one of the following:
 - Select Admin > Communications > Blurbs > Add blurb.
 - Select Admin > Communications > Add blurb.

2. The Add blurb window displays.
3. Enter the blurb name. It can be up to 50 characters maximum. It must be unique.
4. Enter and format text in the Blurb text editor.
5. Add one or more merge fields:

Merge fields are organized by variable group. Select a variable group in the dropdown list to see the each merge token associated with the selected variable group. The variable group categories are:

- Candidate fields
- Addendum (only if implemented by client)
- All client configured candidate forms
- Req standard fields
- Req custom fields
- User profile

From the variable group, select one or more merge fields to insert into the blurb and click <<Add.

6. [New in R11] Set Allow blurb selection during document/e-mail creation? to Yes if you want this blurb to be available immediately for users to select when the document is created. Set it to No (the default) if it should not be available at this time.

7. [New in R11] Select blurb category. If you selected Yes in the previous step, this setting becomes active and you must select a blurb category for this blurb. If Allow blurb selection ... is set to Yes and you do not select a blurb category, an error message is displayed when you click Save.

Your selection in this list causes the blurb name to be inserted before and joined to the category name in the blurb selection list on the add/edit windows for document and e-mail templates (for example, “[Benefits] Executive benefits”).

Alternatively, you can select the blurb from within the Selection details list. To do so, click Selection details to view the entire category name and make a field selection.

Note: When users are creating an e-mail or document that allows blurb selection, they see a list of blurbs that have the same category. Blurb categories are displayed in the user's locale. If a translation does not exist for the user's locale, the category name displays in the client's base locale.

This setting works in conjunction with the Make blurb conditional? setting.

8. [New in R11] Make blurb conditional? Select Yes to make this blurb conditional or leave it set to No (the default) if it should not be conditional.

Conditional and Ordinary Blurbs: If a blurb is conditional, meaning that “Make blurb conditional?” is set to Yes, it appears in the generated document *only* when the field value selected within the blurb matches the data present on the req or candidate form. You must provide values for the two associated settings, Display blurb when and value =.

When you select Yes, the blurb name is appended with “(c)” in the blurb select list on the document and e-mail template add/edit windows to indicate that this is a conditional field. (For example: “Executive benefits (c)”)

When Make blurb conditional? is set to No, it means that if a user inserts the token for this blurb into the body of the document, the blurb text always appears when the document is generated. The two settings associated with conditional blurbs, “Display blurb when” and “value =” are inactive.

How Conditional Blurbs Work during Document/E-mail Generation

When a blurb is conditional, it is still selected as part of the e-mail or document template, but during the generation of the document or e-mail, the blurb text appears only if the configured “condition” is satisfied.

For example, “Blurb A” is configured to display when the field values for “[Req (standard) Department] = “Finance”.

- When the e-mail or document is created from within Req folder 123BR (Department = “Engineering”), the “Blurb A” text does not appear.
- When the e-mail or document is created from within Req folder 456BR (Department = “Finance”), the “Blurb A” text appears.

This setting works in conjunction with the “Allow blurb selection during document/e-mail creation” setting. If both of these settings = “Yes”, the blurb is conditionally available during document or e-mail creation. A conditional blurb becomes available for end-user selection only if it meets the conditional criteria.

Blurb Name Syntax [New in R11]

If a blurb is both conditional AND it has a blurb category, blurbs listed in the Blurb select list on the Add/Edit screens of document and e-mail templates are pre-pended with the category name (e.g., “[Benefits]”) and appended with “(c)”, with a final syntax of “[Benefits] Executive package2 (c)”.

9. [New in R11] Display blurb when. This selection specifies what field needs to be present as a condition of displaying the blurb in the generated document.

Select a field from the list of fields associated with all Req standard, Req custom, and single per candidate/req form fields that contain option lists (multi-select, single-select, radio, or checkbox).

The format of each blurb in the selection list is “[Req (standard)] <field name>”, “[Req (custom)] <field name>” and “[Form name] <field name>”.

You must set *Make blurb conditional?* to *Yes* to make this setting active. Once *Make blurb conditional?* is set to *Yes*, you must make a selection in the *Display blurb when* field or KRB displays an error message when you click *Save*.

10. [New in R11] *Value =*. Select the specific field value(s) that will be used to determine if a blurb will or will not appear in a generated document/e-mail.

If the *Make blurb conditional?* field is set to *Yes*, you must make a selection in this field or an error message is displayed when you click *Save*. This selection determines if the blurb should or should not display within the generated document/e-mail.

11. *Org groups*. This is an existing setting on the *Add blurb* page. Select the *Org groups* that are permitted to have access to this blurb.

12. *User types allowed to modify blurb text during document/e-mail creation*. This is a new setting on the *Add blurb* page. It contains the list of all active user types for your organization. It is not required. No users are selected by default.

Select the user types who have permission to modify the text of this blurb during the creation of documents or e-mails.

Note: By restricting the ability to modify this blurb by user type, your organization can ensure that users are inserting standard company text into e-mail and document templates.

Users of the user type(s) selected for this setting can see the *Edit* link for the blurb on the e-mail / document creation page for all individuals belong to the selected user type.

Users of the user type(s) not selected for this setting cannot see the *Edit* link and cannot edit the blurb text.

13. *Active blurb*. Select *Yes* to make the blurb active and usable currently. Select *No* to make the blurb inactive.

Note: For blurbs created prior to Release 11, this setting is set by default to *Yes* for existing blurbs that were active and to *No* for existing blurbs that were inactive.

14. Click *Save* to when you are finished.

15. The blurb is added to the list of blurbs on the *Blurb administration* page.

Save a Blurb as New

If a blurb exists with content that is similar or partially identical to the blurb you want to create, you can make a copy of it and modify it appropriately.

To save an existing blurb as new:

1. In KRB, select *Admin > Communications > Blurbs*.

2. On the *Communications: Blurbs* page, find the blurb you want to clone, select the radio button for it, and click *Save as new* in the *Actions* menu.
3. An editable version of the blurb you want to clone displays in the *Save as new blurb* window.
4. Enter a name for the clone in the *Blurb name* field. The name must be unique.
5. Make other changes to the blurb as necessary. See the *Add blurb* instructions for information about each section of the page.

View a Blurb

To view a blurb:

1. In KRB, select *Admin > Communications > Blurbs*.
2. In the *Blurb administration* grid, find the blurb you want to view and click its *View* icon. You can see the following information about the blurb on the *View blurb* window:
 - Blurb name
 - Added by
 - Added on
 - Edited by
 - Edited on
 - Blurb text
 - Allow blurb selection setting
 - Select blurb category
 - Make blurb conditional
 - Display blurb when
 - Value =
 - Org groups
 - User types allowed to modify blurb text during document/e-mail creation
 - Active blurb


For information about each setting above, see “Add a Blurb” on page 162 for more information about each setting.

Edit a Blurb

Users with the appropriate privileges can edit an existing blurb in the [Edit blurb](#) window.

Changed in Release 11: The format of this screen has been updated with additional configuration options.

To edit a blurb:

1. In KRB, select [Admin > Communications > Blurbs](#).
2. Find the blurb you want to edit in the [Blurb administration](#) grid and click the pencil  icon.
3. The [Edit blurb](#) window displays. The fields on the [Edit blurb](#) window are pre-populated with the values for the blurb. The fields are:

Setting	Description
Blurb name	This field is not editable. Once it is saved, the blurb name can be used as a merge token field in e-mail and document templates. Changing the field would invalidate e-mail and document templates in which this blurb is used, so this field cannot be changed.
Added by	The user name for the blurb creator. The default format is “First Last” name. The username format may be reversed if Japanese is the base locale of the username. The username format may include a “same name” differentiator – a telephone number or employee ID appended to the user’s name to differentiate users with the same name.
Added on	The date the blurb was created. The default date format is “dd-mmm-yyyy.” The default date format may be changed if Japanese is the base locale of the user who added the blurb.
Edited by	The user name for the last editor of the blurb, if applicable. The default format is “First Last” name. The username format may be reversed if Japanese is the base locale of the username. The username format may include a “same name” differentiator – a telephone number or employee ID appended to the user’s name to differentiate users with the same name.
Edited on	The date that the blurb was last edited, if applicable. The default date format is “dd-mmm-yyyy.” The default date format may be changed if Japanese is the base locale of the user who last edited the blurb.
Blurb text section	The editable content of the blurb text.

<p>Select merge fields</p>	<p>This field displays merge field(s) which were selected when the blurb was created or last edited. The selected merge fields are inserted as tokens into the body of the blurb.</p> <p>Merge fields are organized by variable group. Select a variable group in the dropdown list to see the associated merge tokens. The variable categories are:</p> <ul style="list-style-type: none"> ■ Candidate fields ■ Addendum (if implemented by client) ■ All client-configured candidate forms ■ Req standard fields ■ Req custom fields ■ User profile fields <p>To select merge fields for insertion into the body, select a variable group and then select the merge field(s) associated with the selected variable group.</p> <p>To see an expanded view of the variable group list, click the View icon to the right of the list to open the Selection details window.</p> <p>To see an expanded view of individual fields associated with a variable group, click the View icon to the right of the text area to open the Selection details window displaying the list of fields.</p> <p>Once you have selected one or more fields, click <<Add to insert the field(s) into the blurb text.</p>
<p>Allow blurb selection</p>	<p>This field is set to Yes or No, depending on what it was set to when it was last saved. When set to Yes, KRB users with the appropriate privileges can select it for inclusion in e-mail or document templates. When set to No, KRB users cannot select this blurb for inclusion in e-mail and document templates.</p>
<p>Select blurb category</p> <p>[New in Release 11]</p>	<p>The category selected for the blurb when it was created or last edited, if applicable. If a category is associated with this blurb, it will be selected within the list.</p> <p>WARNING: You cannot change the blurb category for a blurb without invalidating it within all templates. Changing this setting for a blurb changes the name of the blurb, causing the blurb to become invalid for all templates in which it is currently used. KRB displays a warning message explaining the interaction.</p>

	<p>However, if you click OK in response to the error, your changes to the blurb configuration are retained. If you click Cancel in response to the error message, the previous selection for blurb category is restored.</p>
<p>Make blurb conditional</p> <p>[new in Release 11]</p>	<p>Yes or No. This setting determines if the blurb is conditional or not.</p> <p>If the setting is Yes, this field works in conjunction with the condition selected in Display blurb when.</p> <p>If the setting is No, if this blurb is inserted in an e-mail or document template, the blurb's rendered text always appear when the e-mail or document is generated.</p>
<p>Display blurb when</p> <p>[new in Release 11]</p>	<p>This field is active only if Make blurb conditional is set to Yes. If it is set to Yes, you must ensure that a selection is made in this field or an error message displays when you click Save.</p> <p>This selection specifies what field needs to be present as a condition of displaying the blurb in the generated document.</p> <p>If a field selection is associated with this blurb, it will be selected within the list.</p> <p>This list includes fields associated with all Req standard, Req custom, and single per candidate/req form fields that contain option lists (multi-select, single-select, radio, or checkbox).</p> <p>The format of each blurb in the selection list is “[Req (standard)] <field name>“, “[Req (custom)] <field name>“ and “[Form name] <field name>“.</p>
<p>Value =</p> <p>[New in Release 11]</p>	<p>The specific field value(s) that will be used to determine if a blurb will or will not appear in a generated document/e-mail.</p> <p>This list contains the names of all active options associated with the field selected for the Display blurb when setting. If field option selections are associated with this blurb, those options will be selected within the list.</p> <p>If the Make blurb conditional? field is set to Yes, you must make a selection in this field or an error message is displayed when you click Save. This selection determines if the blurb should or should not display within the generated document/e-mail.</p>
<p>Org groups</p>	<p>This setting controls which Org groups have access to this blurb.</p>
<p>User types allowed to modify blurb text during document/e-mail creation</p> <p>[New in Release 11]</p>	<p>This setting controls which user types may modify this blurb when creating a document or an e-mail.</p> <p>This list includes all active user types for your organization. It is not required. No users are selected by default.</p> <p>Select the user types who have permission to modify the text of this blurb during the creation of documents or e-mails.</p>

	<p>Note: By restricting the ability to modify this blurb by user type, your organization can ensure that users are inserting standard company text into e-mail and document templates.</p> <p>Users of the user type(s) selected for this setting see an “Edit” link for the blurb on the e-mail / document creation page for all individuals belong to the selected user type.</p> <p>Users of the user type(s) not selected for this setting cannot edit the blurb text. (These users do not see an Edit link on the e-mail / document creation page.)</p> <p>Click the Selection details link to view the expanded user type name and make selections if desired.</p>
Active blurb	Yes (the default) or No. Set this setting to No if you want the blurb to be inactive until a certain date, or to inactivate a blurb that is not currently valid.

When you are finished editing the blurb, click [Save](#) to save your changes. If there are no errors, your changes are saved and the confirmation message displays.

Otherwise, click [Revert to Saved](#) to go back to the last saved settings or click [Cancel](#) to close the window without making any changes (which restores the last saved settings.)

Deactivate/Reactivate a Blurb

[Changed in Release 11]

Note: If you deactivate a blurb and it is currently associated with a template, the blurb token is still contained within the template; however, the blurb text contained in the blurb is not instantiated when the e-mail or document is previewed.

To deactivate a blurb:

1. In KRB, select [Admin > Communications > Blurbs](#). The [Active view](#) page displays automatically.
2. Locate the blurb you want to deactivate in the Blurbs grid.
3. Click the [Deactivate](#) icon in its row.
4. Review the blurb's attributes in the [Deactivate blurb](#) window.
5. Click [Deactivate](#). A message confirms that the document template's status was changed successfully. (Otherwise, click [Cancel](#) to close the window without making any changes.)

To reactivate a blurb:

1. In KRB, select [Admin > Communications > Blurbs](#). The [Active view](#) page displays automatically.

2. Click the **Inactive** link at the top of the page. The **Inactive view** page displays.
3. Locate the inactive blurb you want to reactivate in the blurbs grid.
4. Click the **Reactivate** icon in its row.
5. Review the blurb's attributes in the **Reactivate blurb** window.
6. Click **Reactivate**. A message confirms that the document template's status was changed successfully. (Otherwise, click **Cancel** to close the window without making any changes.)

Delete a Blurb

[Changed in Release 11]

Before deleting a blurb, you must disassociate it from document and e-mail templates to which it is associated. If you try to delete it, the system displays an error message listing the template(s) with which the blurb is associated and prompting you to remove the association.

To delete a blurb:

1. In **KRB**, select **Admin > Communications > Blurbs**.
2. Locate the blurb you want to delete in the blurbs grid. If the blurb is currently associated with a template, you cannot delete it.
3. Click the **Delete** icon in its row.
4. Review the blurb's attributes in the **Delete blurb** window.
5. Click **Delete**. A message confirms that the blurb was deleted successfully. (Otherwise, click **Cancel** to close the window without making any changes.)

Associate Blurbs with Org Groups

Template administrators, when creating e-mail templates, can select blurbs that are targeted to be used by specific org groups. Only those blurbs that the user's org group has been granted access to appear in the dropdown list of blurbs.

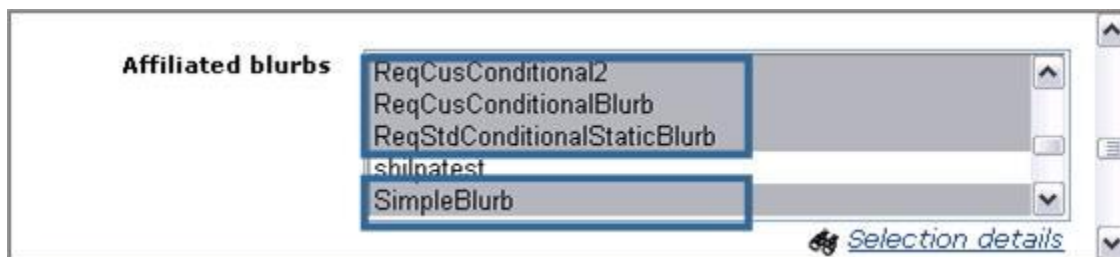
In the **Add new group** and **Edit group** windows, users with appropriate user type privileges can use the **Affiliated blurbs** dialog box to associate blurbs with specific org groups when creating a new org group or modifying an existing org group.

To associate blurbs with Org groups:

1. In **KRB**, select **Admin > Admin+ > Org. groups**.
2. The **Admin+: Org groups** page displays.

3. For existing Org groups, locate the Org group in the grid and click the Edit group icon in its row.
4. The Edit group window opens.
5. Scroll to the Affiliated blurbs field.
6. Select one or more blurbs for association with this Org group.
7. Click **Save** when you are finished.

Affiliated Blurbs Field in Add new group and Edit group windows



If you are adding an Org group, configure the fields in the Addnew group window including the Affiliated blurbs field and click **Save**.

Enhanced Blurbs for E-mail Communications

As of Release 11, when users create new blurbs and insert them into e-mail templates, inserted blurbs are “tokenized” and look similar to merge tokens.

The blurb text is not rendered in the template creation area. Users can click **View text** to preview it.

The blurb text is not editable from within the template creation area. Users with the appropriate user privileges can edit the blurb after insertion into an e-mail (or document) for that e-mail/document only.

To change blurb text permanently, users with the appropriate privileges can edit the blurb itself.

Please see “E-mail Templates” on page 178 for more information.

Blurbs in E-mail Templates Created Prior to Release 11

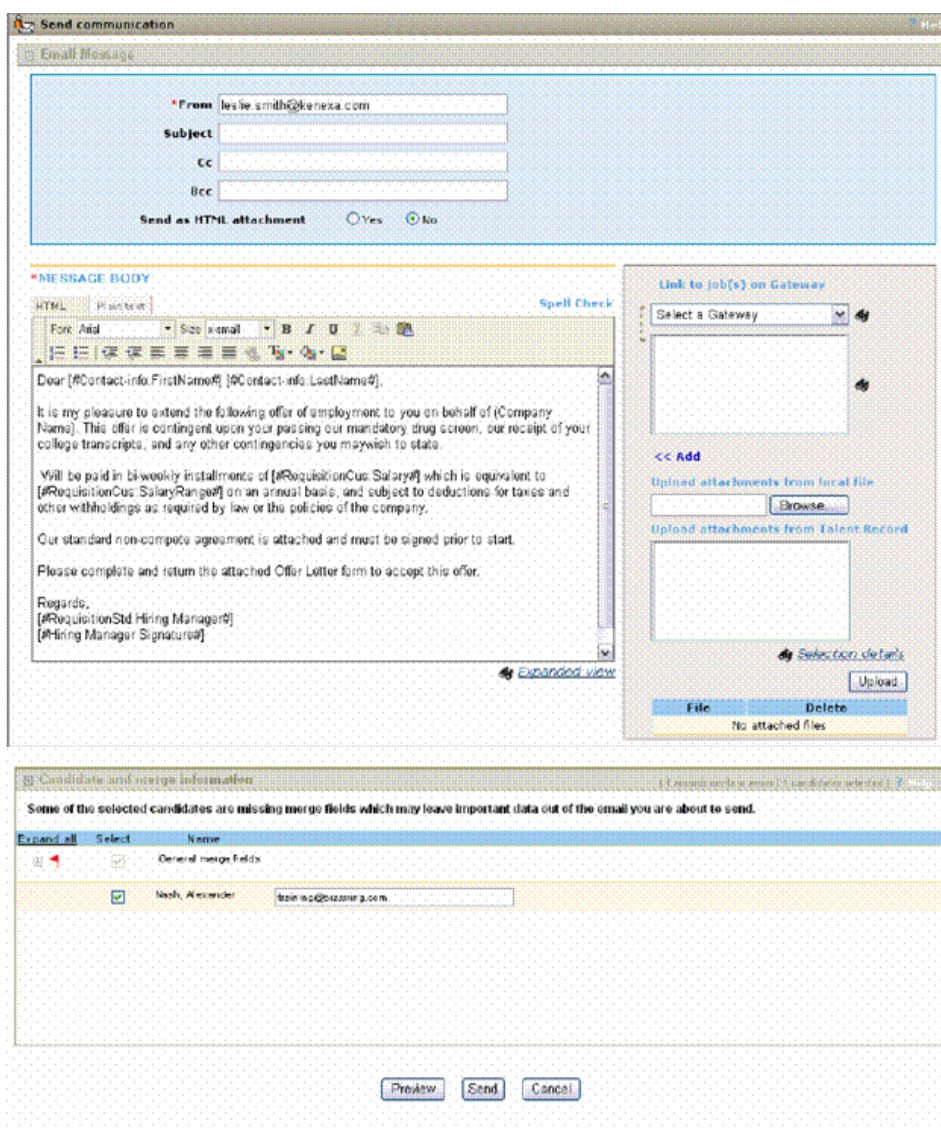
All existing e-mail templates that contain blurbs created prior to Release 11 will function as they did before the changes to blurbs functionality described in this document. All blurbs

created prior to Release 11 are rendered within the e-mail template when the e-mail template is saved (whether upon creation or after editing) as plain text paragraphs.

Your organization can update existing blurbs if it wants to. However, updating the blurb does not update e-mail templates in which the blurb has been inserted. A user with the appropriate user type privileges must edit each e-mail template manually, remove the simple blurb text, and insert the appropriate enhanced blurb “token” in its place.

Please contact your Kenexa consultant for more information about the technical services available for updating existing e-mail templates to use the new enhanced blurb functionality. There are no additional costs associated with the enhanced blurb functionality. There are fees associated with the technical service for converting e-mail templates.

Example: E-mail Containing Blurb Tokens and Merge Tokens

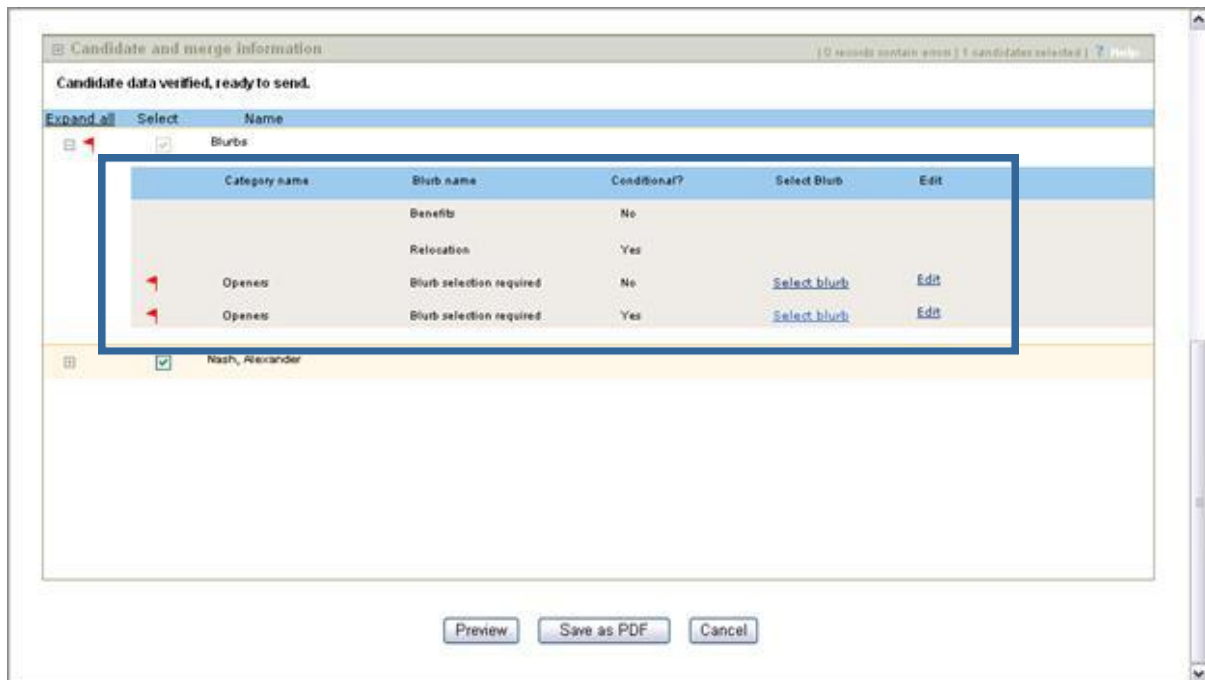


Conditional and User-Selectable Blurbs

Users with the appropriate privileges for editing that particular blurb will be able to change the blurb text when creating an e-mail or document in which the blurb is used.

Blurb content can be conditional and/or user-selectable.

Candidate and Merge Information Area with Conditional and User-Selectable Blurbs



Conditional Blurbs

When an e-mail template is created with a conditional blurb (the *Make blurb conditional?* setting for the blurb is *Yes*), the blurb is inserted into the e-mail only if the blurb “conditions” are satisfied.

Example #1: A blurb is configured to appear only when the req (standard) Department field is Finance. “Finance”. If this e-mail is generated against a requisition where Department is not Finance, then the blurb text is suppressed and all surrounding space is closed up accordingly.

Example #2: A blurb is configured to appear only when the Offer form Relocation field value is Yes. If this e-mail is generated against a candidate where the Relocation field value is No, then the blurb text is suppressed and all surrounding space is closed up accordingly.

Example #3: A blurb is configured to appear only when the Offer form Relocation field value is Yes. If the e-mail is generated against a candidate where the Relocation field is not populated, or if the “Offer” form is not created, then the blurb text is suppressed and all surrounding space is closed up accordingly.

When an e-mail template is created with multiple blurbs associated with the same blurb category, then during the e-mail creation process the user must select the appropriate blurb in the Candidate and merge information section of the Send communication page.

Enhanced Upload Attachments Feature

Users can now select files from either their own desktop or network, and/or from within the candidate's Talent Record for uploading to an e-mail message in the Upload attachment area:

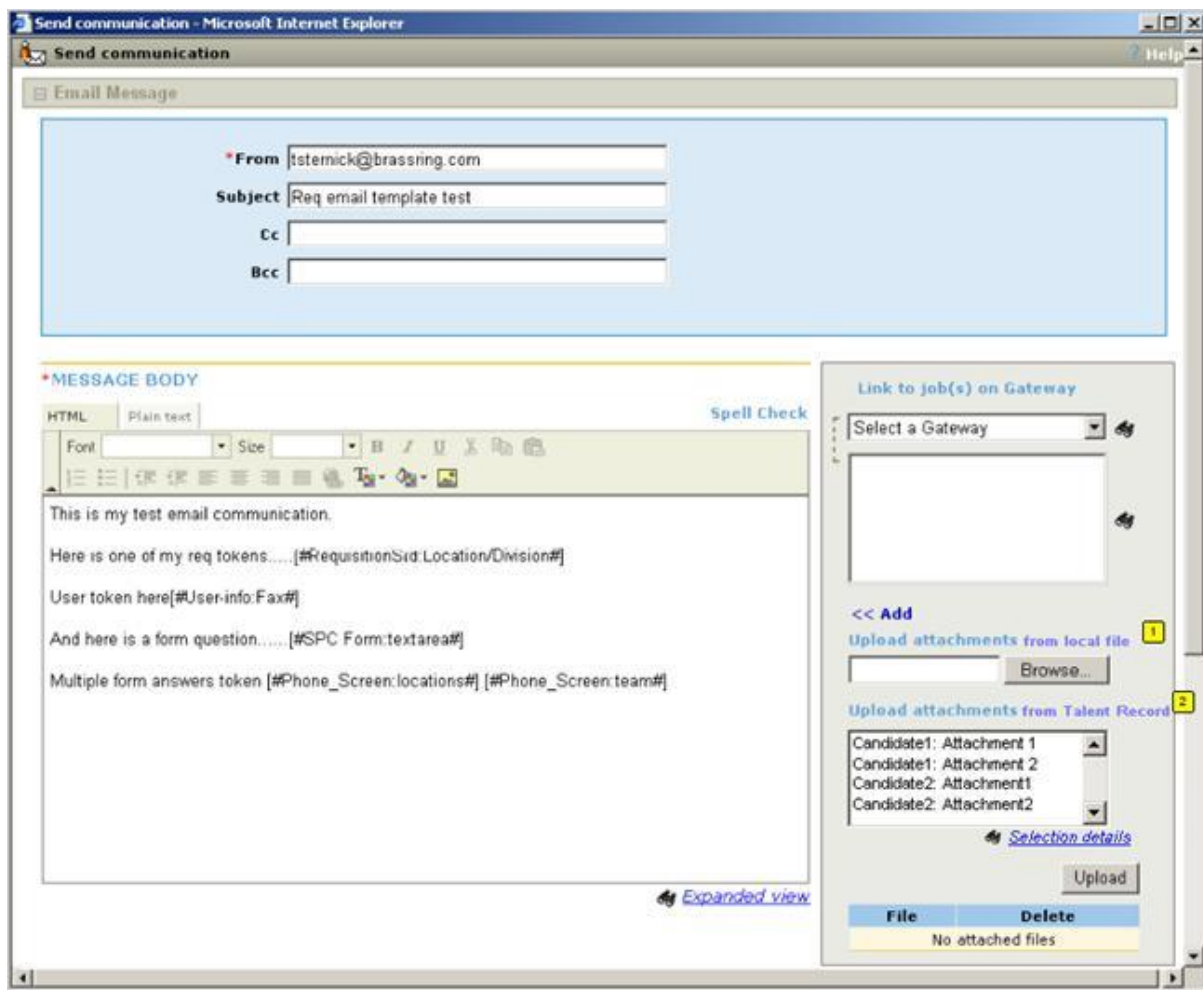
- Use this existing field Upload attachment from local file to upload a local file from the user's machine.
- Use the new field Upload attachments from Talent Record to upload attachments from the selected candidates' Talent Records (if more than one candidate is selected). The list contains all of the attachments associated with each of the selected candidates. Attachments of this type accessed through this control have the following syntax: "<Candidate name>: Attachment name".

Important! When an e-mail with multiple attachments is sent to multiple candidates, each recipient receives *only* the attachments associated with his or her Talent Record.

For example, assume an e-mail communication is being sent to two candidates, John Doe and Sally Smith. The e-mail creator has selected "Attachment A" from John Doe's Talent Record and "Attachment C" from Sally Smith's Talent Record. The sent e-mail directed to John Doe contains only Attachment A, while the sent e-mail directed to Sally Smith contains only Attachment C.

- Click Selection details to view the full attachment name and make the appropriate selections if desired.
- Click the Upload button to add the selected local and/or Talent Record attachments to the list of selected files below the Upload area.

Send Communication Window (E-mail) – Upload Attachments Area



Working with Blurbs While Creating a Document or E-mail

Users with the appropriate user privileges can work with blurbs while in the process of creating a document or e-mail.

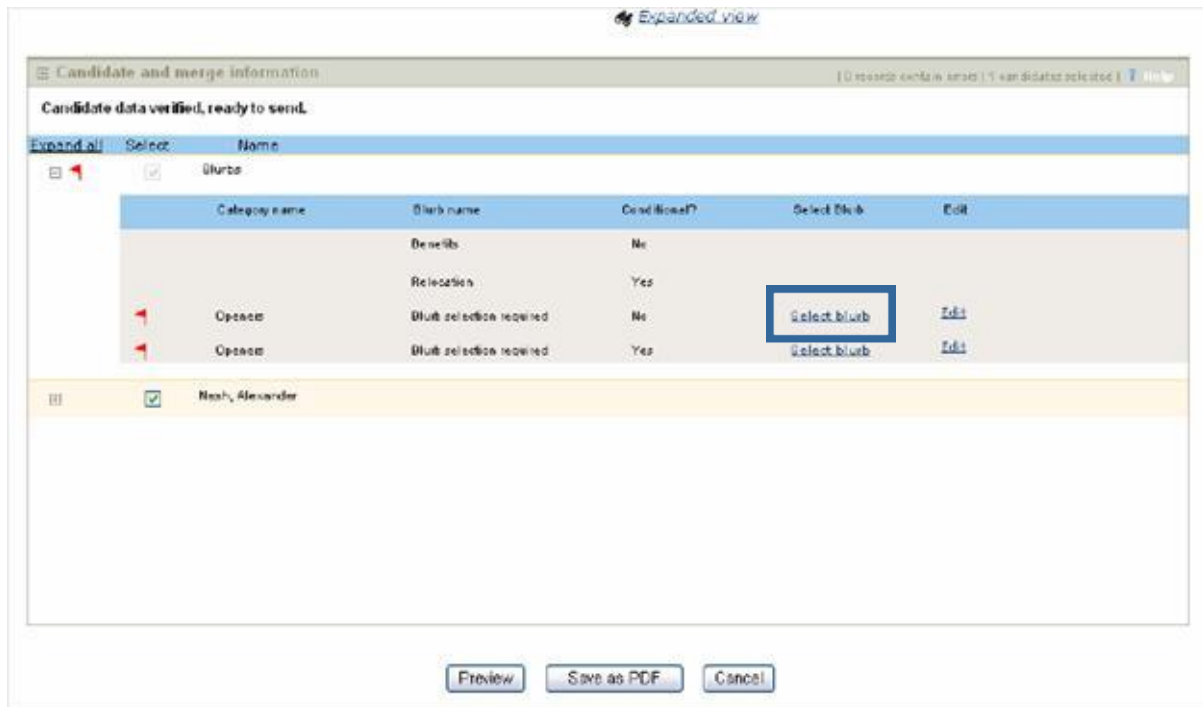
Kenexa recommends as a best practice that template administrators place blurbs of the same category one after another within the template whenever possible.

Selecting a Blurb

The procedure for selecting a blurb when creating an e-mail has changed slightly in Release 11.

To select a blurb:

1. On either the Create document OR Send communication page (for e-mails), click Select blurb.



2. The Select blurb window opens.



3. The Select blurb window displays blurbs within the same category that are available for the user to select.

4. Select the radio button for the blurb you want to include in the document or e-mail.

5. Click OK to save the blurb selection and close the screen. The name of selected blurb is added to the Blurb grid.

6. If you click OK without selecting a blurb, an error message is displayed.

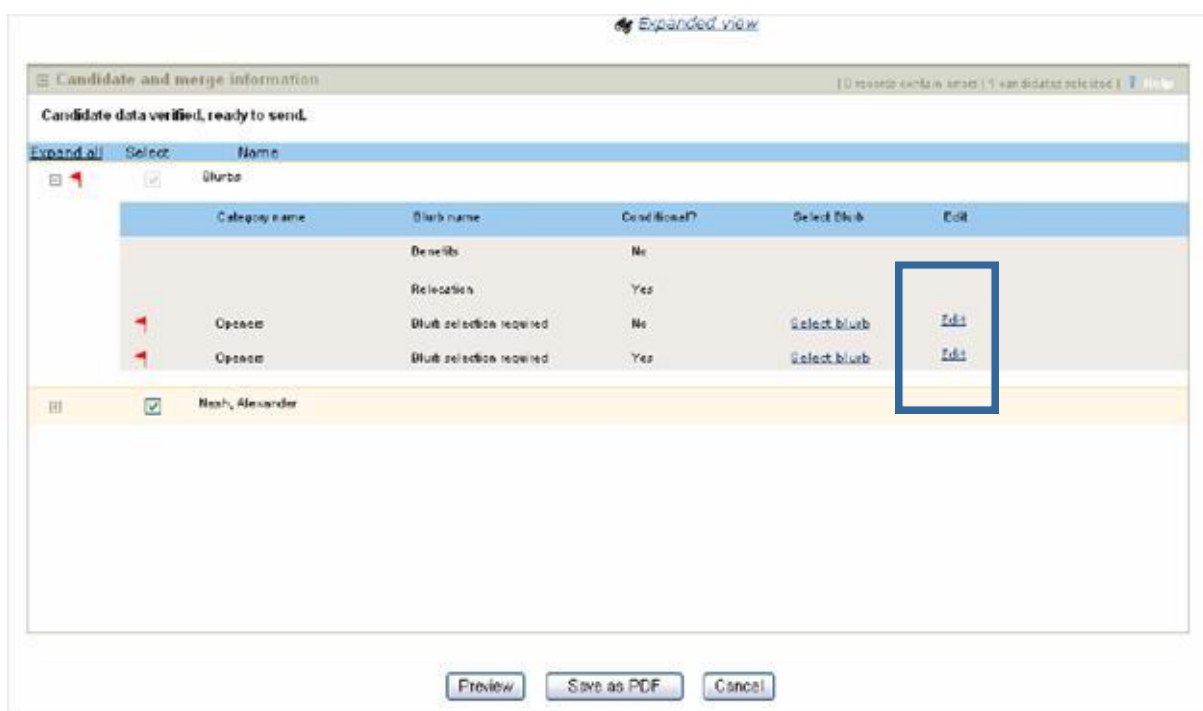
7. To close the window without selecting anything, click Cancel.

Editing Blurb Text

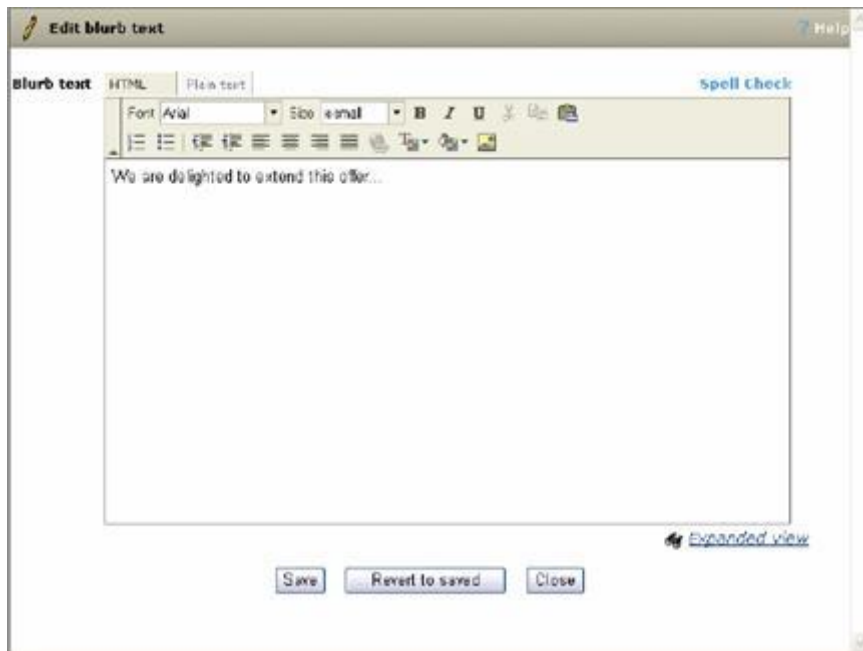
Users with the appropriate user privileges can edit the text of an inserted blurb. If you have those privileges, you can change the text within a blurb for the specific document or e-mail you are creating without affecting the text in the original blurb.

To edit text within the blurb:

1. Select a blurb first if necessary. To do so, click the link in the **Select blurb** column. See page 175 (the previous section) for more information.
2. In the **Candidate and merge information** area on the **Create document** page, click **Edit blurb text** in the **Create document** or **Send communication** window.



3. The **Edit blurb text** window opens.



4. Change the blurb text in the Blurb text editor box.
5. Use Spell Check and the Expanded view functions if desired.
6. Click Save when you are finished editing the blurb text. If you remove text from the blurb and click Save, an error message is displayed. (If you want to remove the content of a specific blurb from a document or e-mail, remove the blurb itself rather than deleting the text from the blurb.)
7. Your changes are saved and the window closes.
8. Otherwise, click Revert to saved to restore the most recently saved version or click Cancel to close the window without saving any changes.

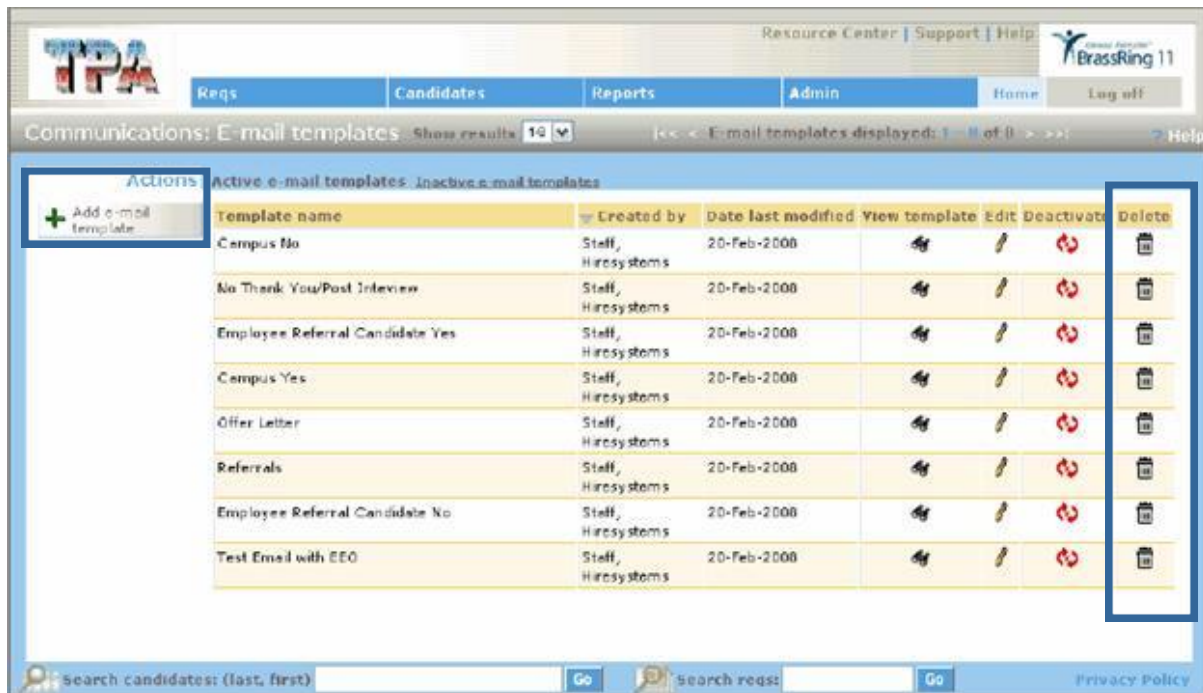
Note: Changes to the blurb affect only the current document or e-mail being created and do not affect the text within the original blurb.

E-mail Templates

As of Release 11, two actions on the Communications: E-mail templates page are validated for user type privileges:

- Add e-mail template: This is an existing action on the Communications: E-mail templates page. The action appears in the Actions menu on the page only if the user has the E-mail templates - add user type privilege.
- Delete e-mail template: This is an existing column on the Communications: E-mail templates page. The column appears in the grid only if the user has the E-mail templates - delete user type privilege.

To access the e-mail templates administration page, select Admin > Communications > E-mail templates. The Communications: E-mail templates page opens.



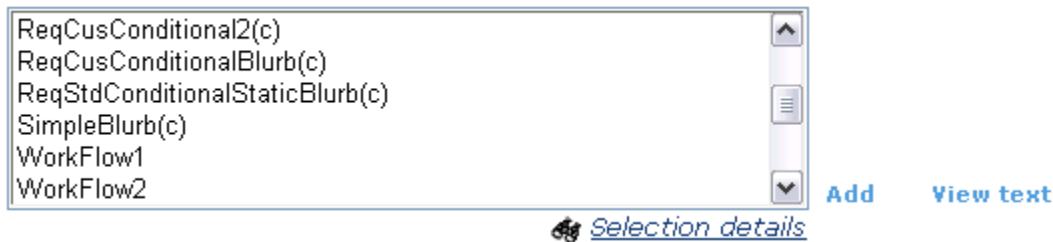
Changes to the Insert Blurb Area for Email Templates

With the introduction of blurb categories, the Insert blurb area of the Add e-mail template and Edit e-mail template windows is changed.

- The multi-select list includes all active blurbs that have been added to the system and are visible to the user according to the user's user privileges and Org group membership.
- Users can select one or more blurbs for insertion at one time.
- Blurbs configured and saved as conditional have a "(c)" value listed after the blurb name. For example: [Benefits] Executive package2 (c). Conditional blurbs appear in the generated document or e-mail only if the configured "condition" is met.
- Blurbs can be associated with categories. User-selectable blurbs must have a blurb category assigned to them; for example: [Benefits] Executive package.
- Conditional blurbs can also have an assigned category; for example: [Benefits] Executive package2 (c).
- Blurbs without an assigned category are listed first, followed by blurbs with assigned categories.
- Blurbs with category designations are sorted by category and then ordered by blurb name.
- During e-mail generation, if more than one blurb from the same category appears within the template, the validation process asks the user to select a blurb.

Insert blurb area, E-mail templates

Insert blurb



Add

The user selects a blurb from the multi-select list and clicks Add. The blurb name is inserted into the MESSAGE BODY text area as a token.

- The token format is [#Blurb:<blurb name>#].
- Spaces and special characters contained within the blurb name are replaced by underscores (_); for example: [#Blurb:Benefits_package_1#].
- If the selected blurb was associated with a blurb category, the blurb name token contains both the name of the blurb and the category name; for example: [#Blurb-<category name>:<blurb name>#]
- Spaces and special characters within the blurb name are replaced by underscores (_); for example: [Blurb-Benefits:Executive_package2#]
- When the e-mail is generated, the blurb token is replaced with the appropriate blurb content.

View Text

To view how the blurb content will look when rendered, click View text.

Best Practice Recommendation

Whenever possible, blurbs of the same category (i.e. the ones in which the user will select the appropriate blurb) should be placed one after another within the template.

Add an E-mail Template

Your Kenexa consultant can design custom greetings for clients that include responses based on form fields, locale-specific salutations, and so forth.

Note: If your organization uses Agency Manager, e-mail templates must be designated as candidate or agency communications. E-mail templates cannot be switched from one designation to the other once they are saved. If you want to change the candidate/agency setting of a template, inactivate the template and create a new one with the changed setting.

You can track when an e-mail template was last edited and by whom. The Last edited by field tracks the user who last edited the e-mail template. The Last edited on field tracks the date the template was last changed.

To add an e-mail template:

1. Select Admin > Communications > E-mail templates. On the Communications: E-mail templates page, click Add e-mail template.
2. On the Add e-mail template page, do the following:
 - a) Enter the template name. This step is required. Use a name that indicates the template's purpose.
 - b) Enter the e-mail subject line.
 - c) Enter a return e-mail address different from your own (or the sender's email address). You can enter a generic reply-to address that displays in the From line of the message. When the field is left blank, it is populated automatically with the sender's email address.
 - d) Use the text editor to compose the e-mail/e-mail template in the MESSAGE BODY area.
 - e) Add merge fields, links to Gateway jobs, and or form links if desired.
 - f) Select one or more blurbs and click Add to insert into the e-mail template.
 - g) Click View to see how the blurb will actually appear in the e-mail template. The rendered blurb text displays in a separate window. Click Close when you are finished viewing it.
 - h) Upload attachments. Browse, select, upload, and attach external documents to the e-mail template.
 - i) Org groups authorized to send and administer this e-mail. Specify Org group authorizations for sending this e-mail template.
 - j) Active e-mail template. Set the new e-mail template to Active.
 - k) Agency. For clients with Agency Manager: Specify whether the template is a candidate or agency template. You cannot change this selection once the template is saved.
- l) Designate template as. [This field is visible only for clients that use Automation Manager (new in Release 11)]: Select the methods for sending the template.
 - ▲ Manual Send - The template is available in the list of e-mail templates when you click Send communication.
 - ▲ Auto Send - The template is available only for use with Automation Manager and does not appear in the list list of e-mail templates in the Send communication workflow

▲ Auto and ManualSend - The template can be used both from the Send communication workflow and by Automation Manager.

m) Save copy of correspondence. Select Yes to save a read-only copy of correspondence created from this letter template on each candidate's Talent Record.

n) Run the spell checker and proofread your e-mail.

o) Click Save.

p) Click OK to finish.

Using the Text Editor

The text editor contains standard toolbar buttons for working with text.

To use the text editor:

1. Create the e-mail template on the HTML tab. Toggle between the HTML tab and Plain text tab to see how the e-mail looks in plain text for recipients who do not use HTML or rich text formats.
2. Type the standard text you want to appear in all messages of this kind in the MESSAGE BODY.
3. Insert and arrange merge fields, Gateway links, and forms. If you want a bigger area to create your e-mail message, click the Expanded view link below the Your message box to display a larger visible area for the text entered in the window.

To select merge fields:

1. In the dropdown list, select a variable group to display the list of associated merge fields.
2. Select one or more merge fields from the list and click Add. Merge fields are inserted into the MESSAGE BODY at the cursor location.
3. In the dropdown list, select a Gateway to display the list of associated jobs..
4. Select one or more jobs from the list and click Add. Links to the selected jobs are inserted into the MESSAGE BODY at the cursor location.

To include forms to complete:

1. Scroll through the list of forms to send to the candidate.
2. Select one or more forms and click Add.
3. Links to the selected forms are inserted into the MESSAGE BODY at the cursor location.

To insert a blurb, select a blurb from the dropdown list and click **Add**.

Blurbs in this list reflect blurbs that have been created for your organization, and for which you have user and org group privileges.

Upload Attachments

You can browse and select one or several external documents for uploading an attachment one at a time to a particular e-mail or e-mail template.

If you inadvertently attempt to upload a file to an e-mail template with an identical file name as an existing attachment, Kenexa Recruiter BrassRing warns you that the file being upload will replace the already-uploaded file. Click **OK** to confirm that you want to replace the file (for example, perhaps you are uploading an corrected version and you do want to replace the already-uploaded version), or click **Cancel** to escape so that the already-uploaded file is not replaced. This happens only if you are trying to upload a duplicate of a file already attached to the template.

To remove an attachment from the list of attached files, click the **Delete** icon.

Specify Org Group Authorizations

This field is required for organizations that use Org groups.

1. From the Org groups authorized to send this e-mail field, select those Org groups that should be able to send this e-mail message.
2. In the Org groups authorized to administer this e-mail field, select the org groups that will have access to edit this e-mail template.

Note: You can compose the e-mail message in a word processing application if desired, then copy and paste the text into an e-mail template. However, if you want hard line breaks, you must put them in after you paste the text.

View an E-Mail Template

If you have the proper authorization, you can view an existing template.

You can track when an e-mail template was last edited and by whom. The **Last edited by** field tracks the user who last edited the e-mail template. The **Last edited on** field tracks the date the template was last changed.

To view an e-mail template:

1. Select **Admin > Communications > E-mail templates**. The list of existing templates appears.
2. Click the **View template** icon to view the template.
3. The e-mail template's details appear in a popup screen.

4. Click OK to close the template's details.

Edit an E-mail Template

If you have the proper authorization, you can make changes to an existing template.


You can track when an e-mail template was last edited and by whom. The Last edited by field tracks the user who last edited the e-mail template. The Last edited on field tracks the date the template was last changed.

To edit an e-mail template:

1. Select Admin > Communications > E-mail templates. The list of existing templates displays.
2. Click the Edit icon to open the saved template definition.
3. Make desired changes to currently selected choices in each section of the template, as desired.
4. Click Save.
5. Click OK to finish.

Reference Table: E-mail Templates

Field	Description
Added by	Edit e-mail template only. The name of the user who created the e-mail template in the format “First Last”. This format is reversed for the Japanese locale.
Added on	Edit e-mail template only. The date on which the e-mail template was created in the format “dd-mmm-yyyy”. The format is different for the Japanese locale.
Edited by	Edit e-mail template only. The name of the user who last edited the e-mail template in the format “First Last”. This format is reversed for the Japanese locale.
Edited on	Edit e-mail template only. The date on which the e-mail template was last edited in the format “dd-mmm-yyyy”. The format is different for the Japanese locale.
* Template name	This is a required field. You cannot change a template name after it has been saved.
E-mail subject line	If the e-mail template has a subject line, the subject line will be included on all e-mails which are based on this template.
Return e-mail address (optional)	If the e-mail template has a return e-mail address, the e-mail address will be included on all e-mails which use this template.

<p>*MESSAGE BODY</p>	<p>The configured content for the existing e-mail template is contained in this section. You can change the text, formatting, add different merge fields, change existing merge tokens, and edit blurbs, and so forth, as desired.</p> <p>Click the expanded view link or the binoculars icon  to open a separate, larger window to work in.</p> <p>If you delete the content in this area and click <i>Save</i>, an error message is displayed. You must include document content to save the e-mail template.</p>
<p>Merge fields [token selection]</p>	<p>Select a tokens from a variety of KRB data sources and insert those tokens within the body of the e-mail template.</p> <ul style="list-style-type: none"> ■ Candidate fields ■ Addendum (only if implemented by client) ■ All client configured candidate forms ■ Req standard fields ■ Req custom fields ■ User profile <p>To select merge fields:</p> <ol style="list-style-type: none"> 6. Select a <i>Variable</i> group to see the list of merge fields associated it. Click the <i>View</i> icon to see the expanded list view <i>Variable</i> groups. 7. Select one or more fields associated with the <i>Variable</i> group. Click the <i>View</i> icon to see the expanded list view of fields associated with a specific <i>Variable</i> group. 8. Click <i>Add</i> to insert that field into the document content area. The merge field is inserted as a merge token in the MESSAGE BODY text area. You can move the inserted merge fields around within the text area.
<p>Insert blurb</p>	<p>Select one or more blurbs from the list and insert them into the MESSAGE BODY text area.</p> <p>The multi-select list includes all active blurbs that have been added to the system and are visible to you according your user privileges and Org group membership.</p> <p>Blurbs configured and saved as conditional have a “(c)” value listed after the blurb name. For example: [Benefits] Executive package2 (c). Conditional blurbs appear in the generated document or e-mail only if the configured “condition” is met.</p>

	<p>Blurbs can be associated with categories. User-selectable blurbs must have a blurb category assigned to them; for example: [Benefits] Executive package.</p> <p>Conditional blurbs can also have an assigned category; for example: [Benefits] Executive package2 (c).</p> <p>Blurbs without an assigned category are listed first, followed by blurbs with assigned categories.</p> <p>Blurbs with category designations are sorted by category and then ordered by blurb name.</p> <p>During e-mail generation, if more than one blurb from the same category appears within the template, the validation process asks the user to select a blurb.</p>
Add	<p>When you click Add, the blurb name is inserted as a token into the DOCUMENT CONTENT area. If you haven't selected a blurb and you click Add, an error message displays.</p> <p>If the selected blurb is associated with a blurb category, the blurb name token contains both the name of the blurb and the category name; for example, "[[category name]blurb name]".</p> <p>When the document is generated, the blurb name is replaced with the appropriate blurb text.</p>
View text	<p>Click View text to view the blurb text prior to adding it to the template. The "View blurb text" screen opens in a separate window.</p> <p>If you haven't selected a blurb and you click View text, an error message displays.</p>
Org groups authorized to create document	<p>This field is required. If you click Save and have not made a selection in this field, an error message pops up.</p> <p>Select one or more org groups from the list that will be permitted to create documents from this e-mail template. This list contains the names of all active org groups for the client.</p> <p>Once you make a selection for this field and save the setting, this e-mail template is available in the Select e-mail template dropdown list for users belonging to the org groups selected here and granted document creation privileges.</p>
Org groups authorized to administer document	<p>This field is required. If you click Save and have not made a selection in this field, an error message pops up.</p> <p>Select one or more Org groups from the list that will be permitted to administer this e-mail template. This list contains the names of all active org groups for the client.</p>

	Once you make selections for this field and save the settings, this e-mail template is available in the Communications: E-mail templates window for users belonging to the Org groups selected here and granted administration privileges.
Active e-mail template	Indicates whether the e-mail template is active or not: Select Yes (the default) or No . You can change the setting of this field. When you click Save the template's status is changed from active to inactive or <i>vice versa</i> .
Save	Click Save to save the settings for the e-mail template. The system performs validation checks on all required fields. Once all required fields are completed the template is saved to the database and a confirmation message is displayed, indicating that the e-mail template was saved successfully.
Revert to Saved	Click Revert to saved to clear out any edits made to the existing template while on this page. The previously saved settings for this page are restored.
Cancel	Click Cancel to close the window without making any changes.

Deactivate/Reactivate an E-mail Template

To deactivate an e-mail template:

1. In KRB, select **Admin > Communications > E-mail templates**. The **Active view** page displays automatically.
2. Locate the e-mail template you want to deactivate in the e-mail templates grid.
3. Click the **Deactivate** icon in its row.
4. Review the e-mail template's attributes in the **Deactivate e-mail template** window.
5. Click **Deactivate**. Otherwise, click **Cancel** to close the window without making any changes.

To reactivate an e-mail template:

1. In KRB, select **Admin > Communications > E-mail templates**. The **Active view** page displays automatically.
2. Click the **Inactive** link at the top of the page. The **Inactive view** page displays.
3. Locate the inactive template you want to reactivate in the inactive e-mail templates grid
4. Click the **Reactivate** icon in its row.
5. Review the e-mail template's attributes in the **Reactivate e-mail template** window.
6. Click **Reactivate**. Otherwise, click **Cancel** to close the window without making any changes.

Delete an E-mail Template

With proper authorization, e-mail templates may be deleted from Kenexa Recruiter BrassRing.

To delete an e-mail template:

1. Select Admin > Communications > E-mail templates. The list of existing templates appears.
2. Click the Delete icon associated with the template definition.
3. The Delete e-mail template window displays the current definition of the template.
4. Click the Delete button.
5. Click OK to finish.

Letter Templates

You can create letter templates to communicate with candidates. Each template must be created in MS Word first and then uploaded using the Browse feature when adding a letter template. Here are some important tips when adding a letter template:

- If you have more than two hundred (200) fields available to mail merge into a letter template, you will need to select the fields using the List>> box. To easily find the field you are looking for, it is best to use the contains search, and enter the name or part of the name of the form that the fields reside on. This will return the list of fields for that form, from which you can select specific fields to include in the template.
- If you are looking for the primary extracted fields such as First name, Last name OR Address, leave the Search criteria field blank and click the Search button. This will return the first one hundred (100) fields available, which will include these primary extracted fields.
- The order of the fields on the template does not need to reflect the order in which they appear in the merge document.
- If you are new to creating communications templates, make sure to review the step-by-step instructions on how to create a letter template. There are several important steps to do this properly. For detailed instructions on creating and editing letter templates, please see the next section.

Add a Letter Template

The procedure for incorporating merge fields into letter templates has been updated.

Note: when creating letter templates for Unicode languages, please select a font that supports the Unicode encoding method for languages (for example, *Arial Unicode MS*).

To create a letter template for a mail merge:

1. Select Admin > Communications > Add letter template.

2. The **Add new letter template** window appears.
3. In the **Letter name** field, enter an informative name for this letter template.
4. Select **Merge fields** from the list.
5. Specify whether the data are required or optional for all merge fields.
6. Click **Preview merge format** to view the merge fields. Keep this window open.
7. Click **Launch MS Word** to create the document. In this step, you transfer merge tokens to a Word document that will be the basis of your letter template. Please see the detailed instructions in the section “**Selecting Merge Fields for Letter Templates**” on page 189.
8. If you are going to use an existing form letter as the basis of this template, navigate to the directory in which the document is stored. Otherwise, open a new document in Word.
9. Create or finalize the contents of the letter template; arrange the merge tokens, add punctuation or custom text if desired, and so forth.
10. Enter the location for the letter template file in the **Upload letter template** field. This step is required. You must upload the letter template file so that it will be available to users with the appropriate user privileges.
11. Select **Org groups** authorized to create this document.
12. Select **Org groups** authorized to administer this template.
13. Select **Yes** (default) or **No** for **Activate batch letter**.
14. Select **Yes** to require that letters be created from within a req folder. **No** is the default setting.
15. **Save copy of correspondence:** Select **Yes** to save a read-only copy of correspondence created from this letter template on each candidate's Talent Record.
16. Click **Save**.

[Selecting Merge Fields for Letter Templates](#)

To select merge fields for the letter template:

1. In the **Add new letter template** page, select a radio button to choose whether data selected as merge fields is optional or required. (This is an “all or nothing” selection; either all merge fields are required or all merge fields are optional.)

Required and Optional Data: By default, **Data required** for all merge fields is selected. This is the safest selection; you must review and correctly populate missing merge fields in order for the mail merge to be executed properly. The choice to make the merge field data required or optional depends on the purpose of the letter template and how precise it needs to be.

Setting the field to the `Data optional for merge fields` option makes the process of creating and editing candidate letter templates more flexible because you do not have to have all the data for the selected merge fields available when you are creating and testing the template. If you select `Data optional...`, the fields that are missing information are ignored when the merge program is executing.

2. Select the merge fields and click `OK`. To select adjacent fields, hold down the `Shift` key and select the first and last token in the list of fields to be selected. To select non-adjacent fields in the list, hold down the `Ctrl` key and select each field you want to include.

Important! You must explicitly select the merge fields you want to include in the letter template from the `Merge fields` list for the system to merge them properly.

3. Click `Preview merge format` to view the list of selected and saved merge fields. The `View merge field` window opens.

4. Follow these steps to insert the fields into the Word document that will become your letter template:

a) Select the text in the `View merge fields` window and press `Ctrl-c` to save it to the `Clipboard / buffer`.

b) Open Notepad or another plain text editor. Press `Ctrl-v` to paste the text from the `Clipboard / buffer` into the plain text document.

c) Delete the “Display name” text from the plain text document, retaining only the “Document reference” text. The Document reference text is the merge token code for each selected merge field. Merge token code starts and ends with the number / pound sign (#).

d) For example, from the first line of text copied into the text editor (as shown in the screen capture in the last step), delete “Candidate first name “ and retain “`#Contact-Info FastName#`” in the list of merge tokens. Repeat this step for each item in the list.

e) Select the merge fields and press `Ctrl-c` to once again copy the text onto the `Clipboard` (the `buffer`). This time you are copying *only* merge tokens in plain text without any extra formatting.

f) Click `Launch MS Word` to open the new Word document that will become your letter template. You can elect to save the document now and reopen it to paste the merge tokens into it, or you can open it now, paste in the merge tokens, and then save it.

g) Press `Ctrl-v` to paste the merge field code into the Word document. The screen capture of the Word document includes some additional placeholder text to demonstrate how to place merge tokens relative to the other elements contained within letters.

5. Continue creating the content for the letter template. Add text paragraphs to it, arrange merge fields, insert line breaks, punctuation, and so forth, as necessary.

6. Name the Word document and save it if you have not already done so. This is your letter template.
7. * Back on the Add new letter template page, browse to the location for the letter template file in the Upload letter template field. This step is required. You must upload the letter template file so that it will be available through the Add new letter template page to users with the appropriate user privileges.
8. Select Org groups and/or Users authorized to send the letter if your organization uses Org group privileges.
9. Select Yes (default) or No for Activate/Deactivate batch letter. See the Kenexa Recruiter BrassRing User Guide (available April 6, 2008) for information about batch letter mailings.
10. Click Save.

General Rules for Selecting Merge Fields

The following are general rules for selecting merge fields that apply to both letter and e-mail templates.

- You can select and add merge fields to the letter template in any order. Once the merge fields are added to the template, we refer to them as “merge tokens.”
- You need to select a merge field only once, even if you want to use its corresponding merge token in several places within the body of the letter template.
- You can always select standard req fields from the Available fields list.
- The Address fields include separate fields for Address1 and Address2 to accommodate longer addresses. When address is a required field, as long as the candidate completes Address1, the merge executes correctly.

Edit a Letter Template

Note: when editing letter templates for Unicode languages, please be sure to use a font that supports the Unicode language.

See “Add a Letter Template” on page 188 for more information.

To edit a letter template:

1. Log into KRB.
2. Select Admin > Communications > Batch letters.
3. Click the Edit icon for the template you wish to edit.
4. The Edit letter template window for that template appears.

5. Make the necessary changes. Important! See page 189 for detailed instructions on how to select and insert merge tokens into letter templates.
6. Click **Save** to save changes to the letter attached to this letter template.
7. Click **OK** to finish.

Deactivate/Reactivate a Letter Template

To deactivate a letter template:

1. Log into KRB.
2. Select **Admin > Communications > Batch letters**.
3. Find the letter template you want to deactivate in the **Batch letters** grid.
4. Click the **Deactivate** icon for that template. A message asks to you to confirm that you want to deactivate the template. Click **OK** to confirm.
5. A message confirms that the batch letter status has been changed. Click **OK**.
6. The template is deactivated. When the browser is refreshed, the deactivated template is listed on the **Inactive batch letters** view page.

To reactivate a letter template:

1. Select **Admin > Communications > Batch letters**.
2. Click the **Inactive batch letters** link at the top of the page.
3. Find the letter template you want to reactivate in the **Batch letters** grid on the **Inactive view** page.
4. Click the **Reactivate** icon for that template.
5. A message asks to you to confirm that you want to reactivate the template. Click **OK** to confirm.
6. A message confirms that the batch letter status has been changed. Click **OK** to close the window.
7. The template is reactivated. When the browser is refreshed, the re-activated template is listed on the **Active batch letters** view page.

Delete a Letter Template

To delete a letter template:

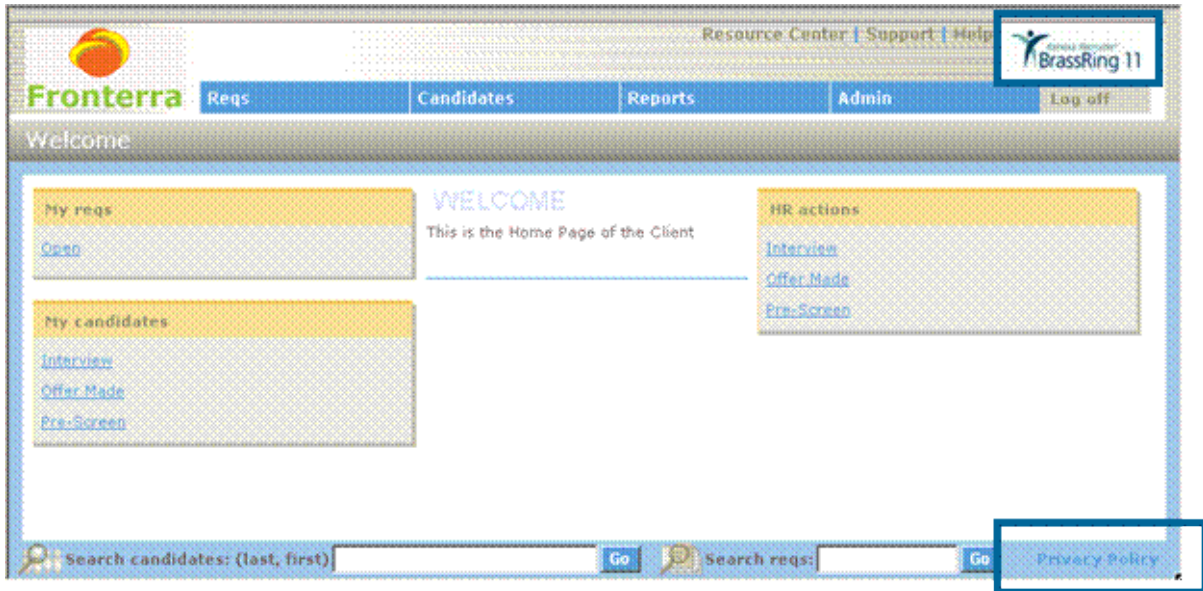
1. Select **Admin > Communications > Batch letters**.

2. Find the letter template you want to delete in the Batch letters grid.
3. Click the `Delete` icon next to the template.
4. Click `OK` to confirm that you want to delete the letter.
5. To cancel, click the `Cancel` button.

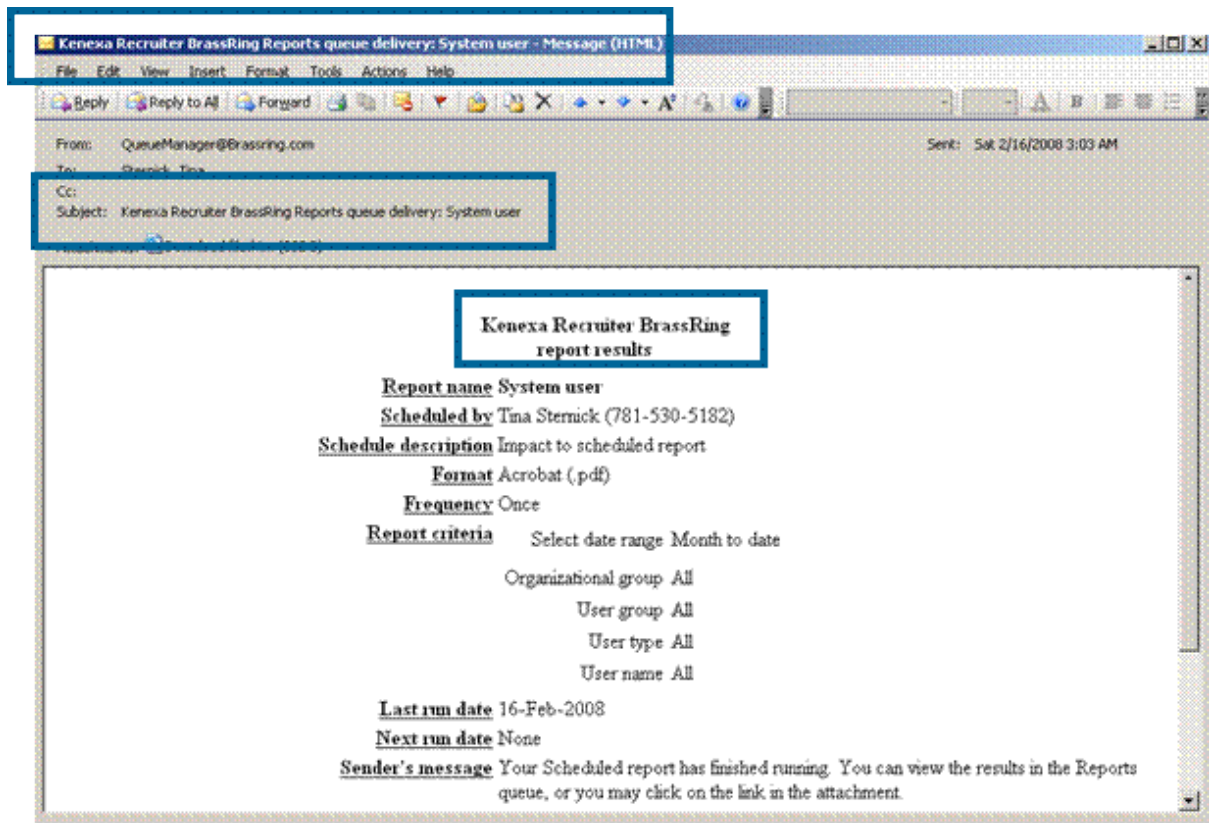
Complete Kenexa Recruiter BrassRing Rebranding

With Release 11, the branding for the Kenexa Recruiter BrassRing™ user interface is complete. The company name, product name, logo, copyright statement, and other legal text have been changed throughout the product's user interface and documentation.

The Privacy Policy link was added in Release 10.



These changes affect all Kenexa Recruiter BrassRing application pages, Reqs menu and requisitions, Candidates menu, Admin menu, reports, e-mails, notifications, and miscellaneous changes.



Benefits

Users will benefit from the consistent company and product naming.

Costs

There are no costs associated with the rebranding project.

Availability

This feature is available in Release 11.

Visible Changes

Users will see changes in the logo, company name, product name, and product colors throughout Kenexa Recruiter BrassRing.

Limitations and Known Interactions

The following instances of the old terminology have not been changes in Release 11:

- The reference to “brassring” in your organization’s URL for Kenexa Recruiter BrassRing has not been changed .
- Your organization’s unique identifier, which is used in Workbench, remains the same.

- The reference to BrassRing in the “From” field for system-generated e-mails has not been changed.

The rebranded and updated context-sensitive Help for Kenexa Recruiter BrassRing, available at the page, window, and sometimes the field level, is available in US English for the internal and external beta releases.

The full set of context-sensitive online Help for Kenexa Recruiter BrassRing, Talent Gateways, and Agency Managers is available in all supported languages with Release 11 on April 6, 2008.

The KRB User Guide online reference guide, available in the PDF file format from the link in the top navigation bar, is available with Release 11 on April 6, 2008.

Best Practice Recommendations

None

Overview of Implementation

These changes are implemented across the system with the exceptions listed in the “Limitations and Known Interactions” section above.

Encrypt SSN by Default

Kenexa's security policies require that we encrypt personally identifying information such as Social Security numbers. With Release 11, data contained in SSN-type fields are automatically encrypted.

Benefits

Clients with existing non-encrypted SSN-type fields are not affected by this change. Clients creating new SSN-type of fields will benefit from the improved security for this sensitive candidate data.

Visible Changes

Users will see encrypted SSN-type fields in Kenexa Recruiter BrassRing.

A tool-tip displays the following message when your mouse hovers over the disabled No option: "Tool-tip text: "Due to security changes, "Yes" must always be selected for this setting. Individual field encryption is still configured at the field level."

Overview of Implementation

With Release 11, Kenexa Recruiter BrassRing applies encryption to all SSN fields (Social Security Number fields) throughout the system. The new client setting, `EncryptFormFields`, is set to Yes for all clients and cannot be set to No. In other words, clients are required to use encrypted SSN fields.

This client setting did not change any existing field-level encryption settings. However, it means that the option to encrypt field data will be enabled for all form fields.

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Because they are automatically encrypted as of Release 11, Social Security Number fields (fields of the Type "SSN") are no longer available for output in candidate grids or through the Data Export Wizard.

Language Support by Browser

Microsoft® Internet Explorer® is available in all languages.

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.

Microsoft Office 2007 Support

With Release 11, KRB supports several new file formats introduced in Microsoft Office 2007 (.docx, .xlsx, .rtfx or .pptx). These file formats are used by Microsoft Word, Excel, and PowerPoint 2007 respectively. They are not compatible with file formats from older versions of Microsoft Office, including Office for Macintosh.

KRB supports the same set of files for Microsoft Office 2007 that we supported for Office 2003 (.docx, .xlsx, .rtfx, and .pptx).

Note: We upgraded Agency Manager in Release 10 to support the listed Microsoft Office 2007 file formats.

How does this affect you and your organization? It mainly affects KRB, Agency Manager, and Talent Gateway users anywhere in the system that files can be uploaded and attached; for example to requisitions (new in Release 11), to Talent Records, to e-mail communications, and so forth).

KRB users can use Microsoft Office 2007 file formats within their Kenexa Recruiter BrassRing system for the operating system / browser combinations listed below.

OS↓\Browser→	IE 6.0	IE 7.0	Firefox 1.5	Firefox 2.0	Safari 2.0
Windows NT	Yes	Yes	Yes	Yes	N/A
Windows 2000	Yes	Yes	Yes	Yes	N/A
Windows XP	Yes	Yes	Yes	Yes	N/A
Windows Vista	No	Yes	No	Yes	N/A
MAC OSX 10.4.4	No	No	No	Yes	No

Limitations and Known Interactions

Clients who are using Microsoft Office 2003 can continue uploading and attaching documents as usual.

For Office 2007 support in the candidate experience (Talent Gateways, Agency Managers, and Gateway Questionnaire), if you enable the Microsoft Office 2007 file types in Workbench, it applies to both candidate upload and attachments. You cannot allow candidates to upload Office 2007 documents (.docx) without also allowing attachments.

Office 2007 Attachments and Gateway Questionnaire

Important! The Gateway Questionnaire does not support Microsoft Office 2007 files, even if the client setting for Office 2007 files is set to Yes. If clients want to turn on the MS Office 2007 attachments support setting, and also have the Gateway Questionnaire support Office 2007 file types, the client will have to use the GQ utility in Workbench and select to edit and save as new all their existing GQs that contain resume attachments.

Best Practice Recommendation

To use this functionality, clients will have to purchase and install either the Microsoft Office 2007 conversion update or the full Microsoft Office 2007 application on their system.

Note: Clients using Office 2007 can save the files as Office 2003 files if desired.

KRB User Experience

Locations for Uploading Attachments in KRB

- Talent Record
- Req attachments
- E-mail template attachments
- Send Interview request or Schedule Interview
- Candidate non-XML form import
- Talent Gateways: Candidate apply attachments
- Real Resume
- Agency Manager
- Event Manager
- Gateway Questionnaire – Manual configuration required.

Location	Path	What You Do There
Talent Record	In KRB, select Candidates > My candidates > Select a candidate > Click on name > Select attachment tab > Click Upload new attachment > Attachments.	Upload a file to the Talent Record.
Req attachments	Select Reqs > View my reqs > Open > Select a req > Select req attachment tab > Upload new attachment.	Upload a file as an attachment to a req.
E-mail template attachments	Select Admin > Communications > E-mail templates. Select a template and click the Edit icon for it.	Upload a file as permanent (but removable) attachment to the template.

E-mail attachments	Select Candidates > Open . Find and click on a req folder to open it. Select the radio button/check box for a candidate. Select Send candidate communication in the Actions menu. Select an e-mail template.	Upload an attachment to an e-mail.
Send Interview request or Schedule Interview	No UI or validation impact.	Office 2007 users can download Interview requests sent from KRB.
Candidate non-XML form import	Select Candidates > Import form data > Import data .	Import non-XML candidate forms.
TGs: Candidate apply attachments	Select Talent Gateway > Admin . Launch a Basic Talent Gateway .	Candidate uploads an attachment when applying through a Basic Talent Gateway.
Real Resume	Select Talent Gateway > Admin . Launch a Full Talent Gateway .	Candidate submits a resume/CV through a Full Talent Gateway.
Agency Manager	Select Talent Gateway > Admin . Launch an Agency Gateway .	Candidate submits a resume/CV through an Agency.
Gateway Questionnaire	Select Tools > Gateway Questionnaire > [GQ Name] > GQ Section > [GQ Page] . Select the action Preview page.	Use the GQ utility in Workbench to manually configure each GQ to be able to upload Office 2007 attachments. For each existing GQ that contain resume attachments, select it for editing, save it as new.

Microsoft VISTA Support

With Release 11, KRB supports the Microsoft VISTA operating system. review

Ongoing Globalization

Clients may choose any language included in this group for their base locale.

	Azerbaijani [R10]		International English*
	Brazilian Portuguese*		Italian*^
	Chinese		Japanese* [New in R11]
	Czech		Korean
	Danish		Norwegian
	Dutch*^		Polish
	US English*^		Portuguese
	Finnish		Russian
	French*^		Slovak
	Canadian French*		Spanish*^
	German*^		Swedish*
	Hungarian		Turkish

* Language offered for both recruiter (Kenexa Recruiter BrassRing) and candidate (Talent Gateways) language

^ Auto-extraction languages

KRB and Agency Manager Support LTR Unicode Languages

With Release 11, Kenexa Recruiter BrassRing supports left-to-right (LTR) Unicode languages (western European, eastern European, and Asian languages) for recruiters within KRB, for recruiters who are non-system-users of KRB, and for Agency Managers. The

Unicode character set is required to support translation for languages such as Japanese. Talent Gateways and Workbench already support Unicode.

Benefits

Kenexa Recruiter BrassRing will be able to support additional left-to-right (LTR) languages more easily. LTR languages include the modern languages of North America, South America, Europe, India, and southeast Asia.

Cost

There are no additional costs for this feature.

Availability

Azerbaijani was available in Release 10. Japanese was available in Release 11.

Visible Changes

There are no visible changes without configuration for this feature. Please see the description of the feature for details.

Limitations and Known Interactions

Slovak

A limited number of fields do not accept Unicode characters. They are:

- Database fields
- Codes: The unique identifier for each code does not support Unicode encoding. However, Req field options for “Code” fields do support Unicode characters.
- Passwords
- Email, numeric fields, and URLs (http addresses)

In addition, KRB integration with any third party tools such as Posting partners and Previsor assessments are not Unicode-compliant.

Best Practice Recommendations

None

Overview of Implementation

Clients purchase locales according to their requirements. Kenexa configures localization settings on behalf of clients.

Posting Partner Changes - All Posting Partners

Kenexa has improved the posting partner functionality for all posting partners in Release 11. The changes are both general *and* selective to each vendor. The changes and additions are described for each vendor (First Advantage and Arbita) in separate sections below.

The changes affecting all posting partners are:

- **Welcome Screen Administration:** This page has been updated to reflect name and logo changes for several of our partners.
- **Five new customizable job fields:** For both standard and custom req fields, the Posting interface mapping setting in Workbench has five new customizable options (Job Custom Fields 1, Job Custom Fields 2, Job Custom Fields 3, Job Custom Fields 4, and Job Custom Fields 5) which clients can use for any posting partner. See the Workbench 11 Release Notes for more information.
- **Posting in Multiple Languages:** Posting partners can send postings in multiple languages, in addition to US English which is the default language for posting reqs through posting partners.

To send a req in a different language for posting, toggle to that language version of the req, complete the req, and click Post. For example, if you are currently toggled to a French version of a requisition, then the posting is sent in French. (Prior to this enhancement, the posting was always sent in U.S. English.)

You cannot transmit a posting in multiple languages by clicking Post once. You must toggle to a specific language version of the req and click Post.

Removing Multi-language Postings: If a position is posted in multiple languages with the Posting Partner and a removal request is sent, the Posting Partner must remove all postings for that requisition across all languages and boards.

If the client wants to remove the posting from a specific board or only in one language, they can log into the Posting Partner's application and adjust the posting parameters.

- **Streamlined "Launch to posting partners" Page:** Kenexa has selectively removed unused fields from the Launch to posting partners page for each posting partner vendor. See the sections following for more information.

Benefits

The Posting Partners interface and the posting process are more flexible, efficient, and usable. Clients can perform Job field mapping of client-defined custom data fields. Clients can send post data through our posting partners to foreign job boards.

Cost

There is no additional cost for this feature.

Availability

September 20, 2007.

Visible Changes

These changes are automatically visible to users whose organizations use posting partners, subject to the appropriate user privileges.

Overview of Implementation

Users with appropriate permissions configure the five (5) custom fields in Kenexa Recruiter BrassRing.

Posting Partner Changes – Arbita

Kenexa removed unnecessary fields and sections from the Arbita posting partner form, added five (5) custom configurable fields to the Arbita posting partner form, and provided the ability to send postings in multiple languages in addition to U.S. English

- **Changes to the Arbita details section:** The fields `Start date` and `Close date` were removed from the Arbita details section of the Launch to posting partner window.
- **Changes to Organization information:** The `Country` field was removed from the Organization information section of the Launch to posting partners page.
- **Changes to the Contact information:** The following five (5) fields and their validations were removed from the Launch to posting partner page: `Organization`, `Address1`, `Address2`, `City`, `Country`, `State/Prov`, and `Zip/Postal code`.
- **Changes to Contact Information for User Profiles:** The following five (5) fields were removed from the Edit contact information window for individual user profiles: `Organization`, `Address1`, `Address2`, `City`, `Country`, `State/Prov`, and `Zip/Postal code`.

To edit user profile contact information for Arbita: In KRB, select `Admin > Posting interface defaults > Edit my profile > Edit contact information`.

Fields removed:

- `Organization`
- `Address 1`
- `Address 2`
- `City`
- `Country`
- `State/Prov`
- `Zip/Postal code`

These contact information fields do not come into play when users are editing profiles for multiple users under *Edit selected users*.

- Posting in Multiple Languages: See page 235 for general information about posting to posting partners in multiple languages.

Best Practice Recommendations – Arbita

Clients should work with Arbita to determine if they wish to access new posting board options for different languages

Posting in Multiple Languages – Arbita

With these enhancements, users can see the posting partner(s) listed on the *Posting options* page when viewing a req in any language. Previously, posting partner vendors did not appear on the *Posting options* pages in languages other than English.

To post a position in a specific language, users should toggle to the requisition in that language, go to the *Posting options* page, and complete the required information. The posting will be sent in the language to which the user was toggled at time of submission

If a req is created in multiple languages simultaneously, posting partner vendors are not listed because the system cannot automatically determine which language should or should not be sent.

Limitations and Known Interactions

- Users must submit postings individually for each language.
- Users cannot send or receive postings in multiple languages within a single transaction.
- At this time, Arbita does not support sending the same requisition in multiple languages. Once a req is posted (in any language), the user receives an error message when he or she tries to post the same req in another language.
- Once a req is posted to a posting partner, an orange “halo” displays behind the push pin for all languages.
- The “halo” disappears only when the posting has been removed from all sites; it is not language-specific.
- Note: Arbita imposes 4000 character limit for job description.

Arbita - Five (5) Customizable Fields

Job information

* Req ID 110BR

* Type [Selection details](#)

* Job title

* Job description

* Qualifications

Benefits

* City

* Country
Check to refresh the State/Province field

* State/Prov [Selection details](#)

Zip/Postal code (required for jobs based in the USA and Canada)

* Reply e-mail

Reply fax

Application URL

Custom field 1

Custom field 2

Custom field 3

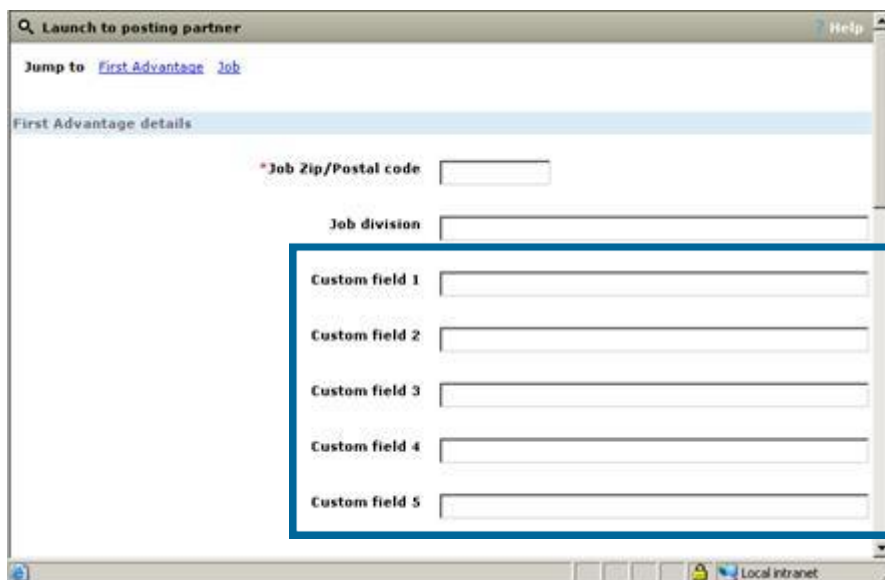
Custom field 4

Custom field 5

Posting Partner Changes – First Advantage

We made the following changes to posting partner screens for First Advantage:

- TruStar is now called First Advantage throughout Kenexa Recruiter BrassRing.
- Kenexa added the ability to map five (5) custom job fields to the Job details section of the Launch to posting partner page.



The screenshot shows a web browser window titled "Launch to posting partner". At the top, there is a search bar and a "Help" button. Below the title bar, there is a "Jump to" section with links for "First Advantage" and "Job". The main content area is titled "First Advantage details" and contains several input fields: "Job Zip/Postal code" (with an asterisk indicating it is required), "Job division", and five "Custom field" entries (labeled 1 through 5). A blue rectangular box highlights the five custom field input areas. The browser's taskbar at the bottom shows the "Local intranet" icon.

- To improve usability and efficiency for First Advantage users, Kenexa removed fields that are not required from the Posting partner form.

On the First Advantage Launch to posting partner page:

- First Advantage details section: The fields Pay rate, Length, Education, Experience, Keyword skills, Job category, and Job industry were removed.
- Job information section: The fields Type, Reply, Fax were removed.
- The Organization information menu items, section, and links to it were removed.
- The Contact information menu items, section, and links to it were removed for clients who use First Advantage as their sole posting partner.

**Kenexa removed
Organization and
contact information
admin actions**

Best Practice Recommendations – First Advantage

Clients should work with First Advantage to determine if they wish to access new posting board options for different languages.

Posting in Multiple Languages – First Advantage

With these enhancements, users can see the posting partner(s) listed on the [Posting options](#) page when viewing a req in any language. Previously, posting partner vendors did not appear on the [Posting options](#) pages in languages other than English.

To post a position in a specific language, users should toggle to the requisition in that language, go to the [Posting options](#) page, and complete the required information. The posting will be sent in the language to which the user was toggled at time of submission

If a req is created in multiple languages simultaneously, posting partner vendors are not listed because the system cannot automatically determine which language should or should not be sent.

Limitations and Known Interactions

- Users must submit postings individually for each language.
- Users cannot send or receive postings in multiple languages within a single transaction.
- Once a req is posted to a posting partner, an orange “halo” displays behind the push pin for all languages.
- The “halo” disappears only when the posting has been removed from all sites; it is not language-specific.

Recruiter Experience - Differentiator for Users with Same Name

Clients with large numbers of users often have multiple users with the same name (for example, John Smith). Your organization can elect to use the “user name differentiator” (either the Employee ID or the Phone number) to distinguish system users who have the same name. When it is enabled, the user name differentiator is appended to each user’s name within round brackets () throughout Kenexa Recruiter BrassRing and Workbench.

Differentiator	Example
Employee ID	Smith, John (46753)
Phone number	Smith, John (212-555-0123)

Benefits

Users can easily differentiate between users with the same name. The integrity of user profile data is preserved: Clients no longer have to input data which interferes with merging, reporting, or exporting to differentiate between users with same name.

Costs

There is no additional cost associated with this feature.

Availability

Release 11

Visible Changes

There are no visible changes without configuration.

If this feature is enabled, the user name differentiator appears every place within the system where a user name is displayed, including all user name drop down lists.

Limitations or Known Issues

Organizations can use only Employee ID or Phone number as a differentiator at this time.

To avoid exposing sensitive data, such as the user’s employee ID or phone number, the differentiator is never appended to user names appearing within eLinks and on Talent Gateways and Agency Managers. Note: eLinks contain the sender’s name only; the data within the link may contain the differentiator.

The differentiator is not included in communications because First name and Last name are individual tokens.

If the user name is input without a differentiator, the system still appends a pair of round brackets () to the name; for example, John Smith ().

If your organization changes either the differentiator type (from Employee ID to Phone number or vice versa) or the content of the differentiator which is already in use (such as the phone number), the data in query selects and DEW profiles are not updated; the data retain the previous differentiator.

If there are duplicate users, and one user has a value in place for the differentiator but the other does not, only the user name with the value is included in the import or export.

Important: Please make clients aware that they must choose a differentiator for which the values are already entered into the system, or enter those values where they are missing.

Caution: If clients imported data values into KRB in the past and they change the differentiator setting from “None” to one of the two new settings, this causes a discontinuity in the data collected before and after the setting was changed.

For Japanese locale users, there is no comma between Last name and First name. See page 11 for more information.

XML and Workbench Import Tools Support the Differentiator

The Import tools for Workbench and XML have been updated to include the differentiator. If the configured setting in Workbench for the user name differentiator is anything other than “None,” then the differentiator must be included with each user name contained in the import file.

XML import includes req, job code, and field association imports. WB import includes WB job code and field association imports and exports.

Best Practice Recommendations

Clients should contact Kenexa to help them execute a clean-up script against user profiles to remove erroneous differentiator data from user names within their system.

Client should make sure the selected differentiator has data for all users.

Overview of Implementation

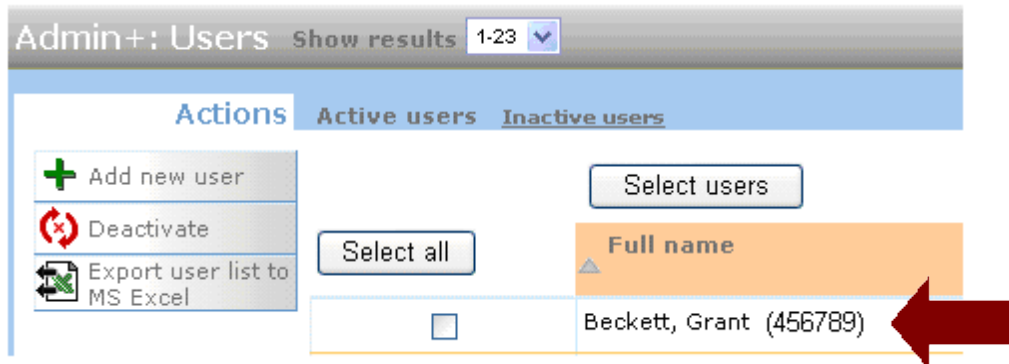
Your organization must turn on the client setting “User name differentiator” in Workbench even if they elect to use no user name differentiator. Clients can use the current method of name display (the default setting) or select one of two new display options.

If clients want to change the differentiation method for people with the same user name, they should contact their client representative or technical consultant.

The user name differentiator is used in the Reqs, Candidates, Admin, and Reports Modules, and in Workbench.

KRB User Experience

The screen capture displays the format for user names in KRB. See the next section for a list of all places in KRB where users see the user name differentiator.



Recruiter Experience - KRB Automatically Proper-Cases Names

KRB has a new client setting which controls how case is applied to names when they are auto-extracted from resumes submitted through Talent Gateways and to Gateway Questionnaires. When the setting is turned on, the auto-extractor follows common locale-based usage rules for applying case to proper names in the currently supported extractable languages: English, French, Italian, German, Spanish, and Dutch.

KRB applies proper-casing to names on Gateway Questionnaires when the applicable Talent Gateway and Gateway Questionnaire settings are enabled. Please the Workbench 11 Release note (in progress) or the Workbench 11 [Self-Service] Manual (available April 6, 2008) for more information. If these settings are not turned on (the default state), KRB auto-extracts candidate names from resumes in the case in which they appear on the resume.

Benefits

When this new setting is enabled, candidate names will have the proper case using both upper- and lowercase letters. This improves the visual appearance of the candidate name and also the overall usability of the name throughout the application. (Previously, when a candidate's name was listed on their resume in ALL CAPS, it would be extracted in that format as well. This meant that ALL CAPS value would be visible in KRB in places such as the candidate's Talent Record, eLinks, search and folder listings and correspondence.)

Cost

There are no additional costs associated with this feature.

Availability

Release 11

Visible Changes

There are no visible changes to the product without configuration.

Limitations and Known Interactions

The automatic proper-casing applies only to names and not other resume content. Once the setting is turned on, it applies only to Kenexa's current list of extractable languages: Dutch, English, French, German, Italian, Spanish

Best Practice Recommendations

None

Overview of Implementation

To enable automatic proper-casing according to common usage rules, Kenexa must enable the Talent Gateways settings (for Basic, Full, and Global TGs) in Workbench: *Enable auto extraction* and *Enable auto proper case names*.

How KRB Applies Automatic Casing Rules

The table below describes the automatic casing rules for several examples.

If the name on the resume contains ...	the extractor follows this rule ...	Example	
all UPPER CASE letters	First name Last name: First letter is uppercase, followed by lowercase for remaining letters in the name.	SALLY SMITH	Sally Smith
Mixture of UPPER CASE and lower case letters	The auto-extractor leaves it as is.	Catherine de Burgh	Catherine de Burgh
all lowercase letters	The auto-extractor leaves it as is.	sally smith	sally smith
Prefixes and or suffixes	It does not extract prefixes and suffixes.		
Hyphenated names	The name after the hyphen is treated like the name before the hyphen and common usage rules apply.	SALLY SMITH-JONES	Sally Smith-Jones

Note: If a name on the resume is in all upper case letters and should consist of mixed casing to be in proper case, the auto-extractor follows common usage rules when extracting the name unless noted as an exception.

Exceptions to Common Usage Rules

The casing rules described in this section are dependent on individual language and are applied based on login locale. The casing of names follows common usage rules unless it is a noted exception for that language.

German

The particle "von" (meaning "of", pronounced "fonn") in a surname is not capitalized (*Alexander von Humboldt*) unless it is the first letter of a sentence (“*Von humboldt submitted his resume on ...*”).

Dutch

The particle "van" in a surname is not capitalized when preceded by a forename or an initial. Accordingly, "Onder de Franse zuiderzon maakt Vincent **van** Gogh zijn meest ophefmakende werken." without the forename *Vincent* would be "Onder de Franse zuiderzon maakt **Van** Gogh zijn meest ophefmakende werken." (Note: In Flemish, the particle “*Van*” is capitalized when preceded by a forename or an initial.)

Also, 't, d', or 's in names or sayings are never capitalized, even at the start of sentences. They are short for the articles *het* and *de* (or the old possessive form *des*). Examples: 's *Gravenhage* (from *des Graven Hage*), *d'Eendracht* (from *de Eendracht*), 't *Theehuis* (from *het Theehuis*).

Exceptions to Common Usage Rules

The tables below describe the noted exceptions to common usage rules. The rules presented in Tables 1 and 2 are applicable to all extractable languages.

Table 1: Exceptions Table – Part of Last Name “Particles”

Exception	Example:	Changes to:
Mac	MACDONALD	MacDonald
Mc	MCINTYRE	McIntyre
O'	O'DELL	O'Dell
D'	D'ANGELO	D'Angelo
DE	DEMARCO	DeMarco
DI	DIBELLA	DiBella

Table 2: Exceptions Table – Stand Alone values

Exception	Changes to:	Example
DE	de	Daniel de Fond (French)
DI	di	Martino di Napoli (Italian)
DU	du	Isabelle du Nord (French)
VON	von	Margarethe von Trotta (German)

VAN	Van	Vincent Van Gogh (Dutch)
'T	't	't Theehuis (Dutch)
'S	's	's Gravenhage (Dutch)
D'	d'	d'Eendracht (Dutch)
DE LA	De La	De La Rosa (Spanish)
DEL	Del	Del Amitri (Italian)

English

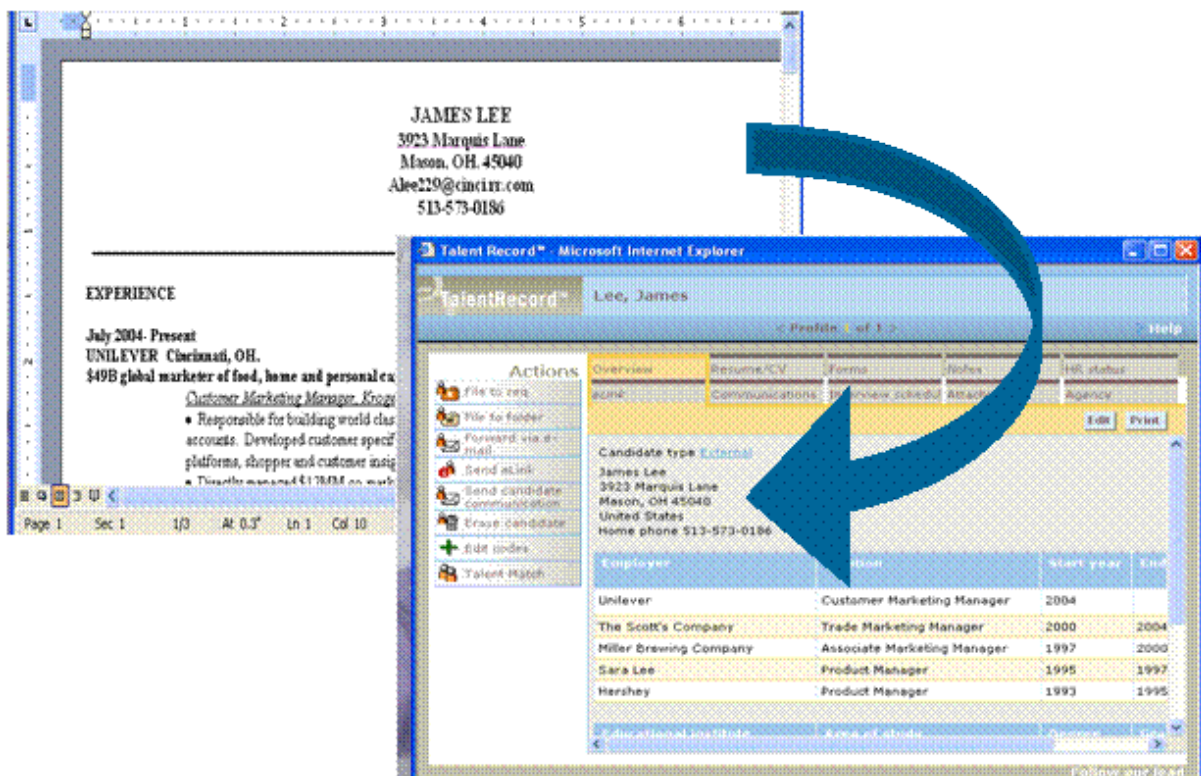
The practice of capitalization varies for names starting with particles which mean "from," "the," or "son of":

Particle	Capitalization
Mac, Mc, M, O	Particle always capitalized. Remaining part of name capitalized for Mc, M, and O; Mac is variable (both capitalized and not capitalized).
L, Van	Usually capitalized
d', de, di, von	Often not capitalized
de La	'L' is usually capitalized; 'd' is not. Remainder is always capitalized if a) it is a separate word from the particle, or b) the particle itself is not capitalized.

KRB User Experience

When automatic proper-casing is turned on, KRB users viewing the Talent Record will see the First name and Last name in the proper case, according to rules of common usage, regardless of the case in which the name appears on the resume submitted through the Talent Gateway.

Auto-extractor with Automatic Proper Casing turned on



In general, users see the proper-casing rules applied as follows:

- UPPER CASE → Upper Case
- Common Usage → Common Usage
- lower case → lower case

Recruiter Experience - KRB Users Can Update HR Statuses 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.

Benefits

This feature increases the flexibility and productivity of Kenexa Recruiter BrassRing users who can update HR statuses without being logged in.

Costs

There is no additional cost associated with this feature.

Availability

Release 10.2

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.

Limitations and Known Interactions

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.

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	<p>→ The user can be a member of the req or working folder, but does not have to be a member.</p> <p>OR</p> <p>The user is the Creator, Recruiter, Hiring Manager or Req Team</p>	→ 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)

member of the particular req associated with the HR status link.

OR

The user is the Owner or Team member of a particular Working folder.

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:

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.

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.

Certified Workbench Users (or Kenexa) must turn on HR status (via eLink) privileges in Workbench.

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.

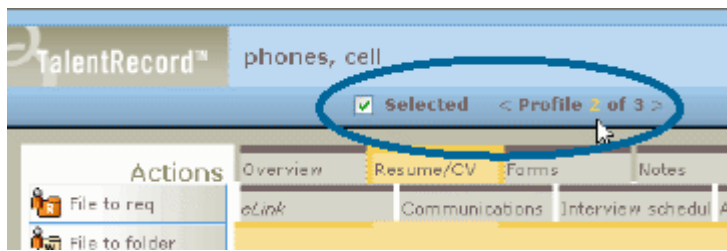
Sending an eLink to KRB Users Who are not Logged In

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.



Talent Record – Selecting multiple candidate profiles

4. The eLink candidate: page appears. See the screen capture on page 79.

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 76 for more information about integrations and form fields.

eLink candidate (Include HR status and Forms to complete)

eLink candidate: selected candidates : (2) ? Help

*From

To: (system users)

To: (non-system users)

Separate multiple users by comma (,); this field may not contain spaces.

Include HR status

Forms to view [Selection details](#)

Forms to complete
CandidateImport
CandidateImportForm
CandiTest
Disposition Form [Selection details](#)

Notify me when these forms have been submitted.

Send as HTML attachment Yes No

Subject

Your message

* - required field

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:

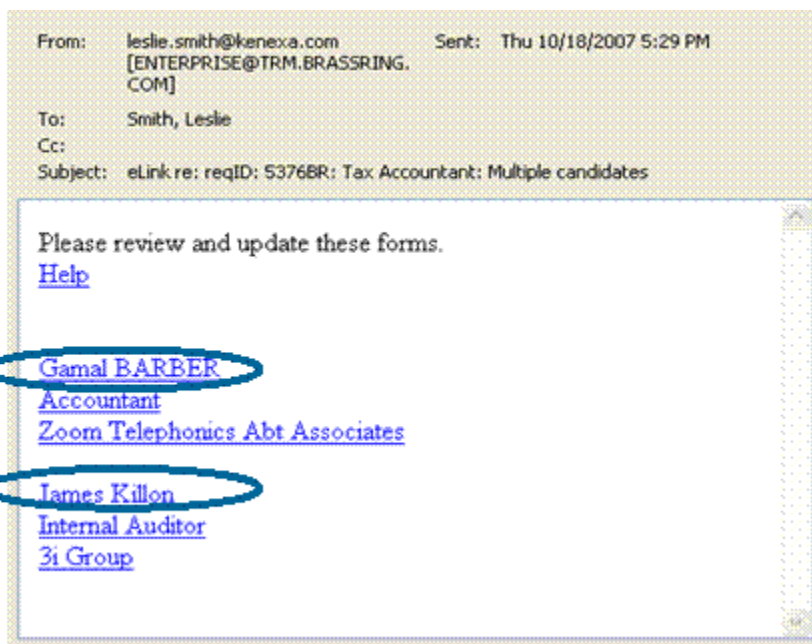
1. Open the e-mail containing the eLinked candidate Talent Record. The subject line is in the following syntax:

eLink re: reqID: <Req. No.>: <Job Title>: <Candidate Name>

For example:

eLink re: reqID: 5376BR: Accountant Gamal Barber

2.



In the e-mail, click the candidate name candidate name eLink. (There are two candidate name eLinks in the image below.)

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.

HR Status Tab with current HR status eLink

HR status date	Folder	Reg ID	Req/Folder	Updated by	HR Status
20-Dec-2005		1518R	English by English user	Amber Pacheco	Review
20-Dec-2005		1528R	Dutch by Dutch user	Amber Pacheco	0-Filed
06-Dec-2005			Test Folder	Amber Pacheco	2nd Interview
05-Jun-2006			test	Amber Pacheco	0-Filed
13-Jan-2006		1108R	Manager	Kelly McKiernan	Interview
31-Oct-2005			test	Kelly Test	0-Filed
11-Aug-2005			test 34	Kelly McKiernan	Interview
31-May-2005		1188R	CIQ Job 2	Josy-Ann Dailly	0-Filed
06-Aug-2004			L	Harvey Jarvis	Interview
20-Jul-2004			working folder for auto optional ID	Query Manager	0-Filed

5. Click the HR status link in the HR status column.
6. The Update status window for the candidate opens.

Update status window available through eLink

(Back to current HR status)

Current status: Review Updated by: LSmith

Filed
 Interview
 2nd Interview
 Hired
 Candidate Withdrawn
 Rejected

Action date: 28 Sep 2007

Notify users working with this candidate

Update Update and add next Cancel

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 77 for an explanation of what constitutes “working with the candidate.”

4. Click **Update** to simply update the field and display the confirmation page.

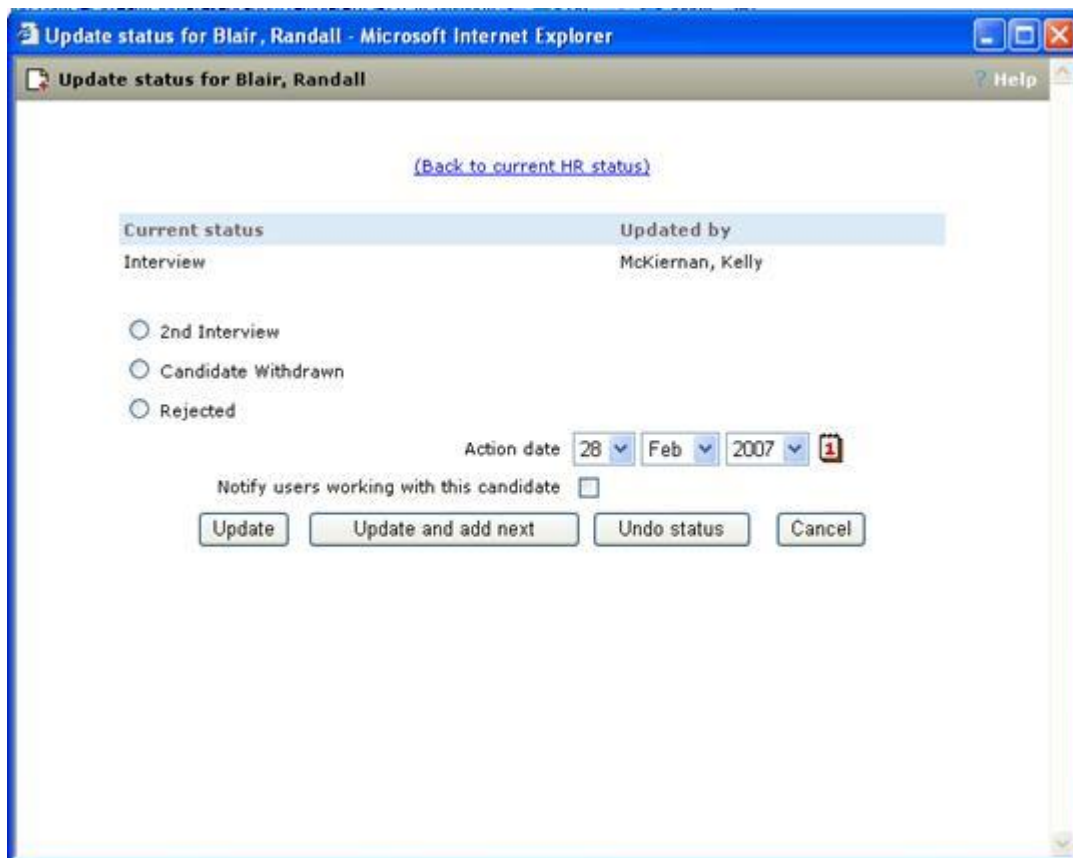
If you are updating the status for multiple candidates, click **Update and add next** to display the next **Update status** page.

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.

Updating intermediate statuses

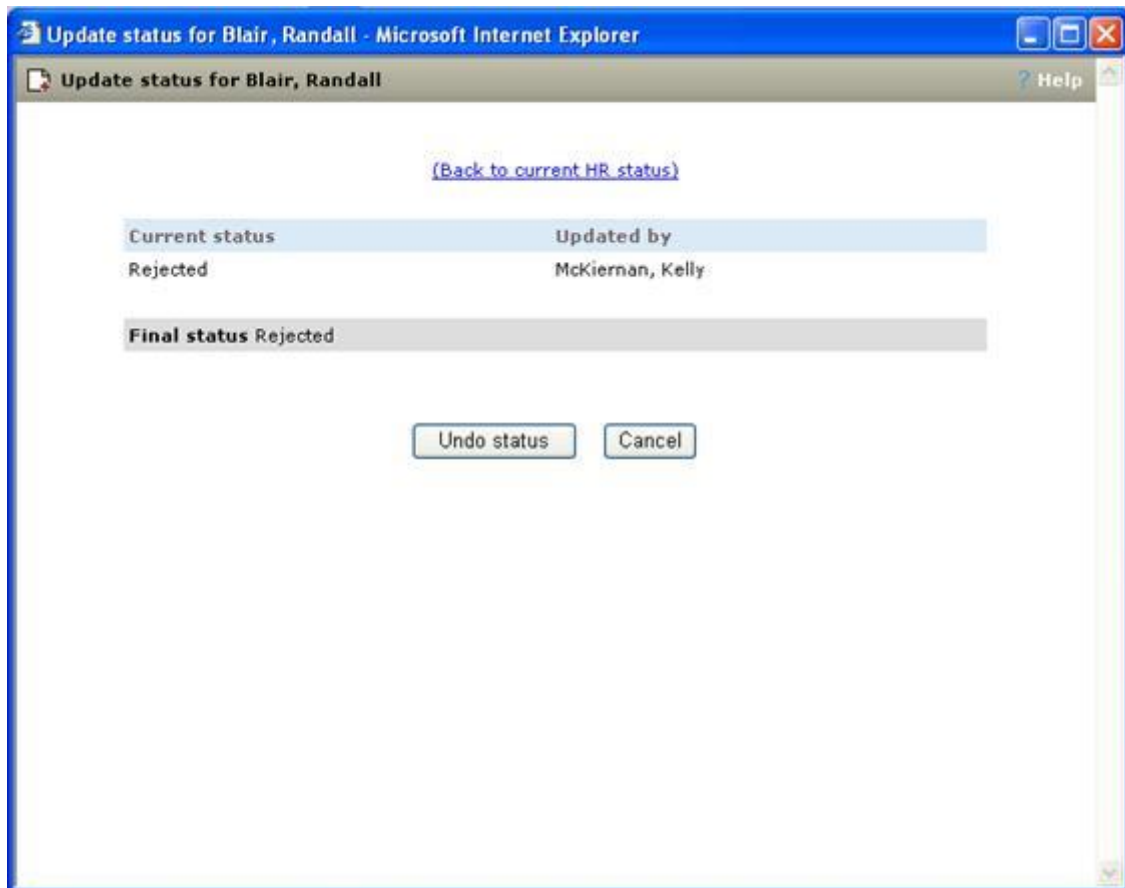


Updating Final Statuses

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.

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.



The screenshot shows a dialog box titled "Respond to eLink" with a "Help" button in the top right corner. The dialog contains the following elements:

- A label "Request the following:" followed by a dropdown menu showing "Phone Screen".
- A link icon and the text "[Selection details](#)".
- A label "Note text" followed by a large, empty text area with a vertical scrollbar on the right.
- A checkbox labeled "Save this text as a note" which is currently unchecked.
- Two buttons at the bottom: "Send" and "Cancel".

Recruiter Experience - KRB Warns Users before Automatic Logout

Users working within KRB and Reporting will see a warning message when the system detects inactivity for the amount of time configured for each client. The system displays a warning message prompting users to respond five (5) minutes before automatically logging the user out if no response is forthcoming.

Benefits

In previous releases, the system logged users out with no warning. With Release 11, the system warns users and gives them the opportunity to extend the session.

Costs

There are no associated product and/or service costs for this feature.

Availability

Release 11

Visible Changes

Yes

Limitations and Known Interactions

The “time out due to inactivity” warning message is standard text and not customizable.

Best Practice Recommendations

None

Overview Of Implementation

All KRB users experience the five minute warning prompt automatically without any configuration.

[Note: Clients can configure settings related to cookie expiration. See the *Workbench 11 Release Notes* for configuration instructions.]

KRB User Experience

The warning message displays on the logged-in user’s screen when the system detects inactivity. The system considers the user to be inactive when he or she takes no actions that involve the server, such as clicking actions or selecting menu items, performing searches, submitting data, and so forth.



If the user does not click OK, he or she is logged out of KRB when trying to take an action.

Recruiter Experience - Merge Tokens: Employee Referral Email Notifications

There are several new tokens available for use in referral e-mail notifications:

■ The following tokens were added to R10.2 on September 17, 2007 to support e-mail notifications related to employee referral:

- Referred candidate last name (#Contact-Info:LastName#)
- Referred candidate first name (#Contact-Info:FirstName#)
- Referring employee last name (#EmpRef:LastName#)
- Referring employee first name (#EmpRef:FirstName#)

■ The following tokens have been added for Release 11 (available April 6, 2008):

- Original referral submission date (#EmpRef:OrgRefSubmissionDate#)
- Most recent referral submission date (#EmpRef:MostRecRefSubmissionDate#)
- Referral status description (#EmpRef:MostRecRefSubmissionDate#)
- Referral start date (#EmpRef:RefStatusDesc#)

Benefits

Clients can use an extended set of Employee Referral tokens in e-mail notifications.

Cost

There is no additional cost associated with this feature.

Availability

Releases 10.2 and 11.

Visible Change

There is no visible change without configuration. These tokens are available for implementation in Workbench.

Limitations and Known Interactions

None

Best Practice Recommendations

None

Overview of Implementation

Clients may use these tokens when configuring e-mail notifications related to the Employee Referral System.

KRB User Experience

If implemented by clients, this will be reflected in the content of e-mail notifications related to employee referrals.

Recruiter Experience - Merge Token: “Other Phone”

A new “Candidate contact information” merge field, “Other Phone,” is available for use in letter and e-mail templates. The purpose of this token is to capture the candidate’s mobile phone number. The new merge token, “Other Phone,” displays as a merge field available for selection on the [Add e-mail template](#) and [Edit e-mail template](#) pages.

Benefits

Capturing the candidate’s mobile phone number is especially important for locales in which mobile phones are the primary phones used by many candidates. It is also useful for clients who are using letter templates as a mechanism for creating formatted printed documents for internal use.

Costs

There are no additional costs associated with this feature.

Availability

Release 10.5 (November 26, 2007)

Visible Changes

Users with the associated user privileges will see this change.

Limitations and Known Interactions

None

Best Practice Recommendations

None

Overview of Implementation

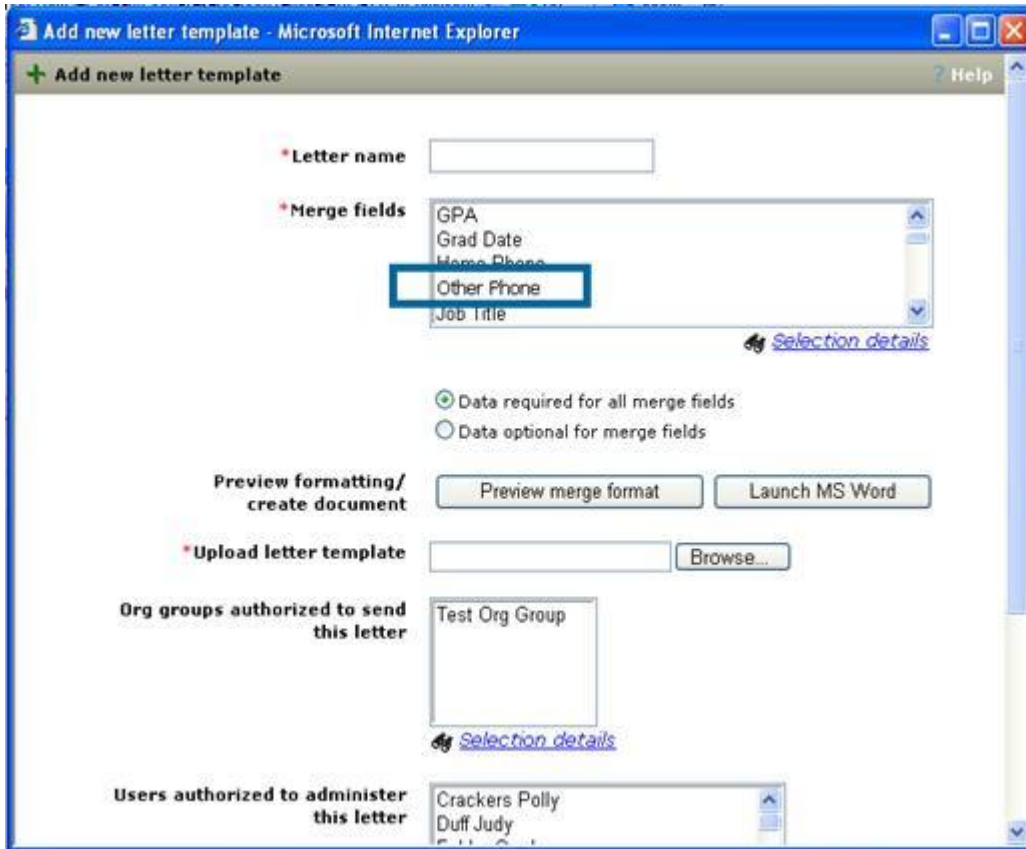
This is available automatically to users with the appropriate user privileges.

KRB User Experience

For users with the [Letters – add templates](#) and [E-mail templates – administer](#) privileges turned on, “Other Phone” displays as a candidate token available for use in e-mail and letter templates.

“Other Phone” in Letter Templates

Users with [Communications – enable](#) privilege turned on for creating letter templates can use the “Other Phone” merge token on the [Add letter template](#) and [Edit letter template](#) pages.



View Merge Fields

The syntax for the “Other Phone” merge token Document reference is #Contact-Info:OtherPhone#.



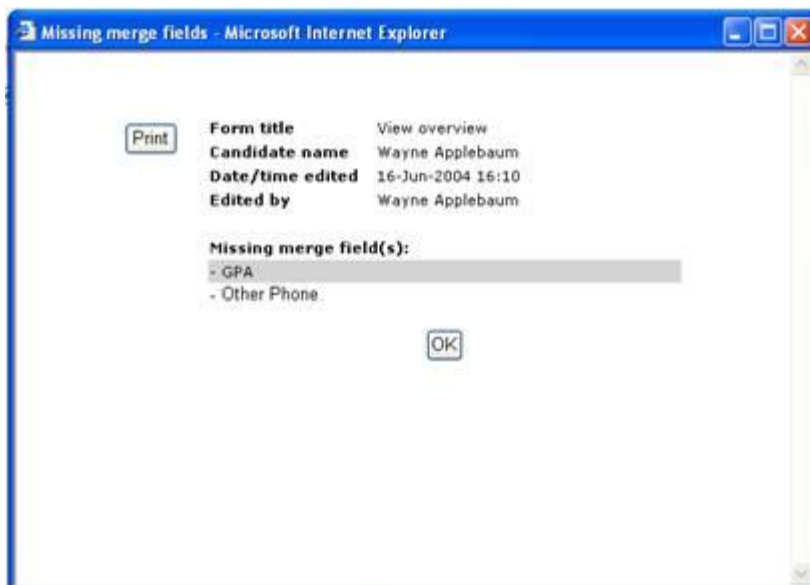
Missing “Other Phone” Merge Data

If the Other Phone field on the Candidate overview page is empty (meaning that this information has not been entered into the system), the Send communication page opens and displays a link to the missing merge field. (There could be other missing fields associated with other merge tokens as well.)

Example: Missing Merge Field Grid




To view the expanded list of missing merge fields, click the link in the Missing merge field(s) column. The Missing merge fields window displays. Click OK to close the window.



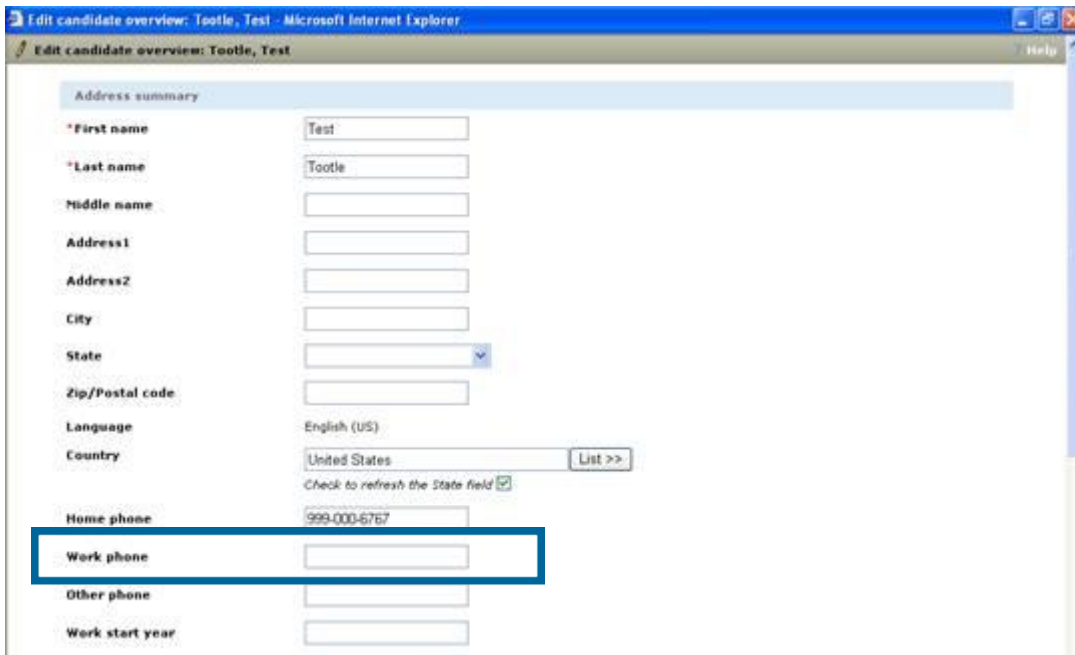
Adding the Missing Data for the “Other Phone” Merge Field


In the case of the “Other Phone” merge field, you can add the “Other Phone” information to the candidate profile if you have the Candidate profile – Edit overview privilege turned on.

To correct missing merge fields, click the pencil icon  in the Edit/Add column of the missing merge field grid on the Send communication page.



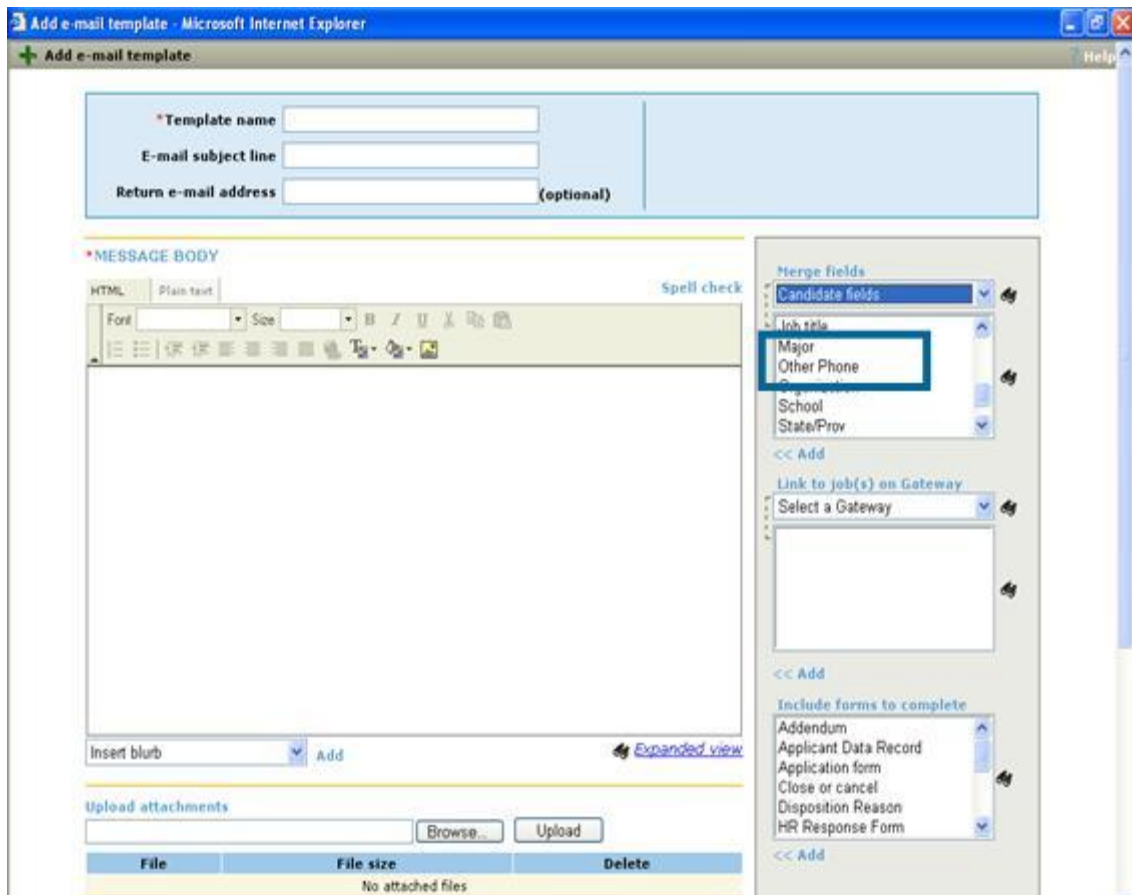
The Edit candidate overview page displays. Enter the mobile phone number for the candidate and click save. The missing merge field grid should refresh on the Send communication page.



If you click  in the grid but do not have the appropriate user privileges, an error message displays.

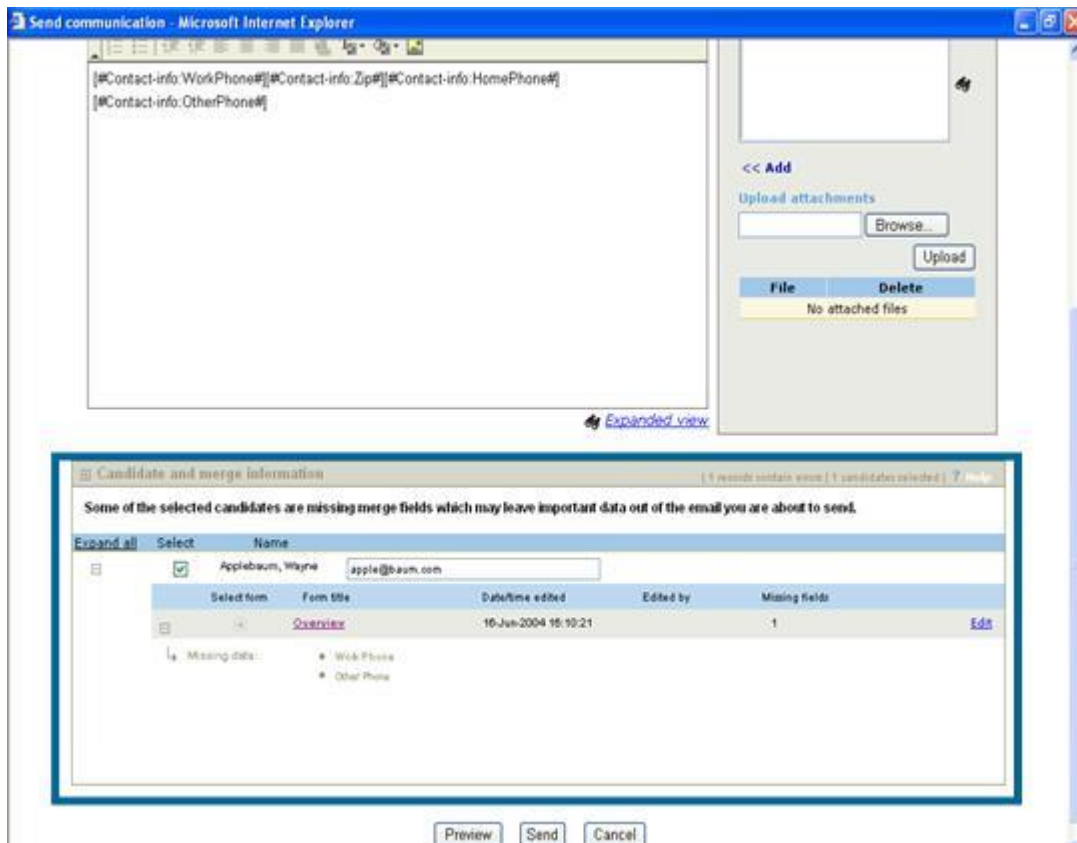
“Other Phone” in E-mail Templates

The Other Phone field displays in the list of merge fields on the Add e-mail template page.



Missing Merge Fields

If you add the “Other Phone” merge field to the e-mail template, and the Other Phone field on the Candidate overview record is empty, the candidate will be listed in the Candidate and merge information section.



Example: Candidate and merge information section associated with an e-mail template

Click the expand icon (+) to display the data that is missing for the particular form.

If you do not have the Candidate profile – Edit overview user privilege turned on, the following error message displays when you click the Overview or Edit link: “You are not authorized to take this action.”

In the case of “Other Phone,” if you have the Candidate profile – Edit overview user privilege turned on, the Edit candidate overview window displays. You can add the missing candidate token information there.

Recruiter Experience - Recruiters Can Associate Codes to Specific Submissions

With Release 11, when adding source codes to a candidate's Talent Record, users can select the resume submission to which a particular source code should be associated. This functionality works with the Source yield report which has been significantly enhanced.

The Add Source Code <# selected candidates> window has been updated:

- The instructions at the top of the page have been updated.
- Candidate names appear next to a select list containing the last 10 submissions for that candidate along with the submission date and any codes already associated with that submission.
- The “Current” resume is selected by default
- In req folder, req-specific submission, if available, is selected by default.
- When the user clicks Save, the new codes are associated with the selected candidate submission.

Add Source Code: 3 selected candidates

Select a code and click 'Add' or 'Remove' to move it from one column to the other. Then, select the submission to which you wish to associate the new code. When you are finished, click 'Save'.

Available values

Select the code(s) to assign

- 1BRG:Internet Brassing.com
- 1HDH:Internet Headhunter.net
- 1MON:Internet Monster.com
- 2EMR:Star Search/Employee Referral
- 3AON:Agency and Temp-perm
- 4ADV:Advertisement/Newspaper/Magazine/Secondary Intern
- 5FMR:Former Employees
- 6OTH:Other - Not classified elsewhere (includes HR Inbox and
- 7JBF:Job Fair/ College Recruiting
- 8INT:Internal Applicant

[Selection details](#)

Fields you can add to your search results

Selected values

- 1HTJ:Internet HotJobs.com

[Selection details](#)

Fields currently on your search results

Associate code to specific submission

Stone, Sharon:	Current-Date loaded: 25-May-2006 14:33:13 (English (US)), Codes: AcmeWEB2, 138BR	Selection details
Rubble, Barney:	Current-Date loaded: 25-May-2006 14:33:13 (English (US)), Codes: AcmeWEB2, 138BR	Selection details
Beckett, Josh:	Current-Date loaded: 25-May-2006 14:33:13 (English (US)), Codes: AcmeWEB2, 138BR	Selection details

Save Cancel

Recruiter Experience - Recruiters Can Attach Codes Manually to Candidates

In KRB, you can manually attach a source code to an individual candidate from several task sequences in the system.

To add a source code for a specific candidate:

1. Access the **Add codes** page from any of these locations:
 - From the candidate's Talent Record. Click **Edit codes > Add codes**.
 - After searching, within your search results, click **Add codes** in the **Actions** menu and click the **Add codes** button OR click the **Last codes** hyperlink for a candidate and the **Add codes** button.
 - Within a folder (req/working/inbox): Click **Add codes** in the **Actions** menu and click the **Add codes** button OR click the **Last codes** hyperlink for a candidate and the **Add codes** button.
2. Select the appropriate code from the **Available values** list and click the **Add button >>** to move it to the **Selected values** list. (If you want to remove a code from the **Selected values** list, click the **Remove button <<**.)
3. Select a specific candidate submission from the single-select list (next to the candidate name) under the **Associate code to specific submission** heading.
4. Click **Save**.

Adding Codes for Multiple Candidates

You can add source codes for multiple candidates in a single action. Select up to 25 candidates from the list. If you add more than 25 codes and click **OK**, an error message displays.

Add Source Codes Window

Field	Description
Associate code to specific submission	Select the specific submission to which you want to attach the selected code(s).
[New in R11]	<p>Candidate names are listed in the format "Last, First". In each select list, the name of the "submission" appears followed by the date loaded and any codes already associated with that submission.</p> <p>This information is included for all submissions currently visible within the candidate's talent record.</p> <p>This section follows the rules for displaying candidate submissions, both new and duplicate. See page 69 for more information about how duplicate resumes, including req-specific duplicates, are</p>

displayed on the Talent Record from within req folders. If a candidate submission is no longer visible in the Talent Record in general, it is not available for selection in this field.

The format for submissions is:

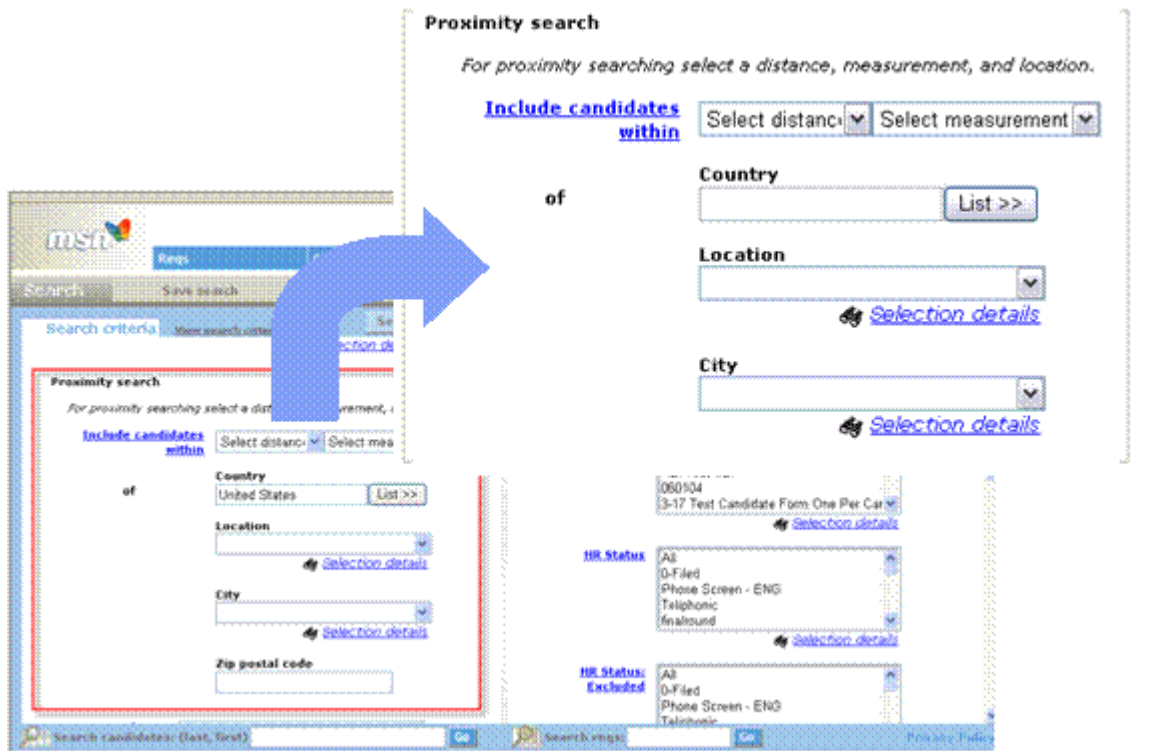
<Submission name>-Date loaded: <date/time stamp> <submission language>; Codes: <code>,<code>

When you access the [Add source code](#) page from within a Talent Record, or from Search results, Working folders, or My Inbox folder, the submissions designated as “Current” in the list are always selected by default. If you do not select a different submission option in the list, the selected codes are attached to any submission labeled “Current” when you click [Save](#).

When accessing this page from with a req folder, the “Req-specific duplicate” submission is always selected by default within the list. If there is no specific submission for a particular req (i.e. the candidate never applied to a specific job but has been manually filed to the req), then the submission designated as “Current” is selected by default.

Recruiter Experience - Recruiters Can Do Domestic/Global Proximity Searches

The candidate Search page supports both US and international proximity search for recruiters.



Benefits

Recruiters working in all supported locales and languages can take advantage of international proximity search to find candidates. Recruiters can narrow down their job search to candidates located within a selected set of longitude and latitude coordinates which demarcate a square around the search location.

Cost

There are no additional costs associated with this feature.

Availability

Release 11

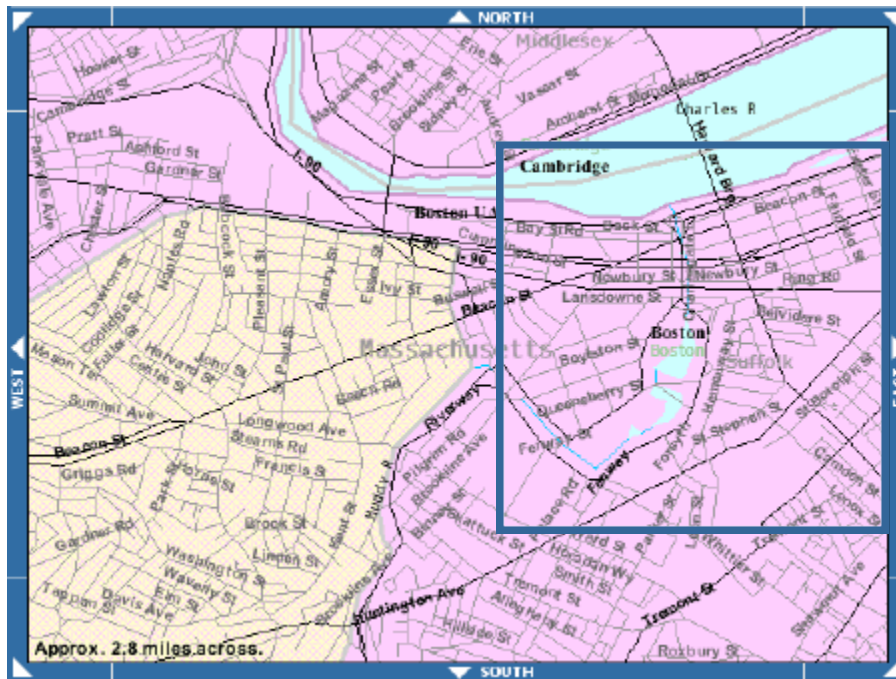
Visible Changes

There are visible changes without configuration for this feature. Please see the description of the feature for details.

Limitations and Known Interactions

KRB users from non-US English locales should include Proximity as a search field on their candidate Search page. See below for detailed instructions.

Proximity search is conducted within a square around the selected location based on coordinates for longitude and latitude.



[This is a public domain map from the U.S. Census Bureau (<http://www.census.gov/geo/www/tiger/tigermap.html#MAPSURF>)]

Proximity search can not be configured as part of Job code default data.

Proximity search can not be used in conjunction with Job Match on the Talent Gateway.

The Zip postal code field checks against five (5) characters and displays when United States is selected as the Country. It does not display if the candidate selects a country other than the United States.

Best Practice Recommendations

None

Overview of Implementation

This change is included automatically with Release 11.

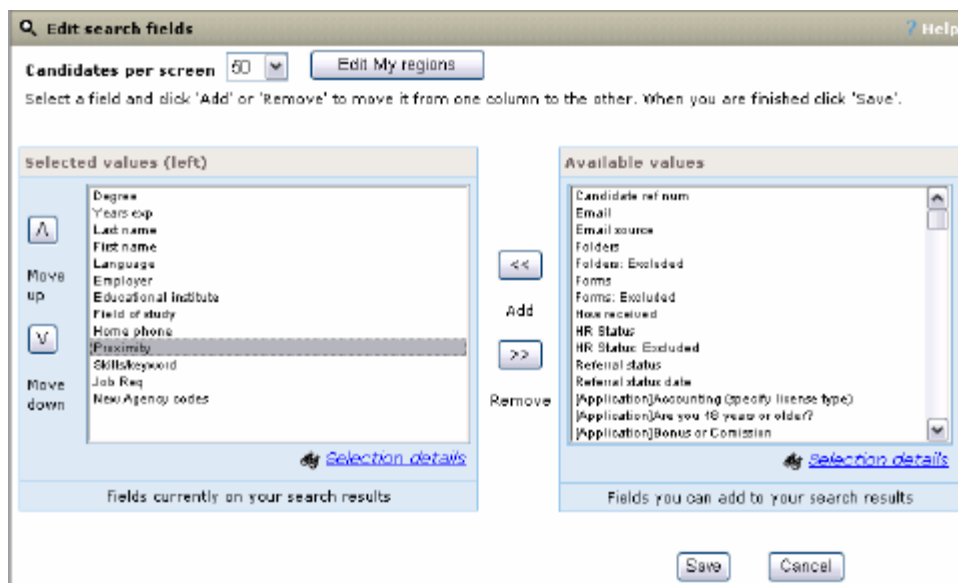
KRB User Experience

To use the new Proximity search feature, you must first add “Proximity” to your search page.

Adding Search Fields to Your Search Page

To include Proximity search as a field on your Search page, add Proximity to your set of default search fields.

1. In KRB, navigate to a candidate Search page.
2. Click the Edit search fields button.
3. Select Proximity in the Available values box.
4. Click the double left arrows to move it to the Selected values (left) OR Selected values (right) box.
5. Use the up and down arrows to position it in the list.
6. Click Save.
7. The Edit search fields window closes.
8. The Proximity search area is included on your candidate Search page.



Doing an International Proximity Search

Proximity search

For proximity searching select a distance, measurement, and location.

Include candidates within 20 kilometers

of

Country
France

Location
Ile-de-France

City
Paris

To do a global proximity search:

1. In the Proximity search area, click the List >> button for the Country field.
2. Search for the country name in the search window.
3. Select the country name in the Available fields list to move it to the Selected fields list.
4. Click OK to close the search window.
5. The country you selected populates the Country field.
6. The jurisdictions (such as states, provinces, districts, and so forth) associated with that country populate the dropdown list for Locations.
7. Select a location from the dropdown list.
8. The cities associated with the selected location populate the dropdown list for Cities. For example, if you select *Ile-de-France* for the Location, the City dropdown list is populated with the cities located in *Ile-de-France*.
9. Select the city whose proximity you are searching within from the dropdown list.
10. Select the units for measuring the distance: Miles OR Kilometers.
11. Select the distance amount from the following values: 5, 10, 15, 20, 25, 30, 40, 50.

In the example below, the user selected *France* for Country, *Ile-de-France* for Location, and *Paris* for City, kilometers for Measurement and 20 for Distance. The search would retrieve candidates within 20 kilometers (using longitude and latitude) of Paris, France.

Doing a U.S. Proximity Search

When you select United States in the list of Countries, the Zip postal code field appears in the Proximity search area of the candidate Search page. Users searching for U.S. candidates can search within a specified distance of a Zip code.

Proximity search

For proximity searching select a distance, measurement, and location.

[Include candidates within](#)

of

Country

Location

[Selection details](#)

City

[Selection details](#)

Zip postal code

Recruiter Experience - Recruiters Can Update Multiple Reqs Simultaneously

With Release 11, KRB users with the appropriate user privileges can update the Recruiter, Manager, and/or Req team fields for multiple requisitions at the same time from the requisition output grid.

Benefits

This feature reduces the number of steps required to update key information on requisitions, thereby improving recruiter efficiency.

Costs

There are no associated costs for this feature

Availability

Release 11

Visible Changes

There are no visible changes without configuration. The update multiple req user privilege must be turned on for a user type to see the new functionality.

Limitations and Known Interactions

Users who create Req drafts: The Update multi reqs user privilege does not apply to req drafts.

Customers who use Req import: Users cannot update multiple reqs simultaneously using Req import.

Customers who use Integrations: Users cannot update multiple reqs simultaneously through Integration.

Customers who use Field association: If any of the three fields, Recruiter, Manager, or Req team, is configured as either a parent or child field for Field association, KRB users cannot update that field using the multiple req update feature.

Best Practice Recommendations

None

Overview of Implementation

Kenexa personnel must turn on the client setting for this feature. Kenexa personnel or Certified Workbench Users must configure user type privileges for this feature for either the My reqs or Reqs user type categories.

User Experience

KRB users with the new user privileges turned on can select check boxes for up to fifty (50) reqs at the same time in the requisition output grid. The “Select” column includes the ability to “Select all” or “Deselect all.”

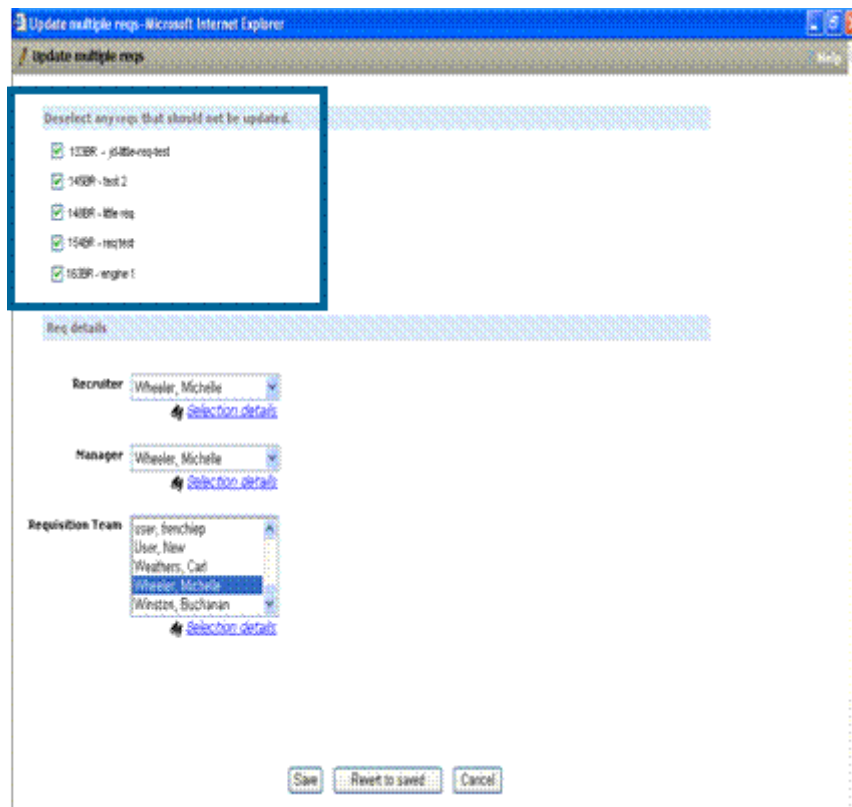
Non-Privileged User View



Privileged User View



Update multiple reqs Window



Update Multiple Reqs Simultaneously

To update Recruiter, Manager, and/or Req Team simultaneously for multiple reqs:

1. Navigate to the req output grid that contains the set of requisitions which you want to update.
2. Select the checkboxes for the reqs to be updated. You may select up to 50 individual reqs at one time.
3. Note: For all other Actions menu items, you can select only one requisition at a time.
4. Click Update multiple reqs in the Actions menu.
5. The Update multiple reqs page appears.
6. The selected reqs display with a checkbox selected by default. If necessary, you can deselect reqs that should not be updated in this block. If you de-select a req in this step, that req will not be updated.

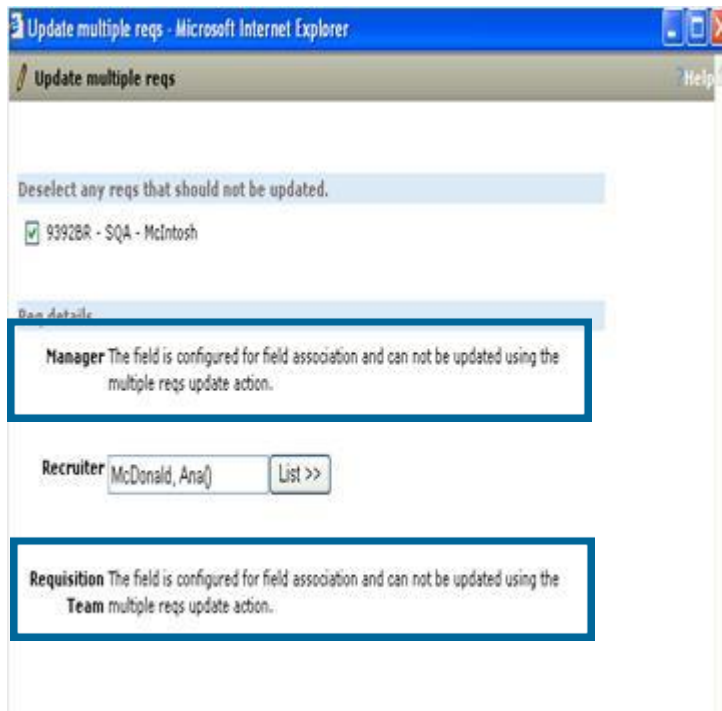
Deselect any reqs that should not be updated.

- 133BR - jd-little-req-test
- 145BR - test 2
- 148BR - little req
- 154BR - req test
- 163BR - engine 1

7. Perform the update for the following fields as necessary: Recruiter, Manager, and Req team.

Field	Description
Recruiter	<p>If you make no selection in this field, there is no change to the recruiter selected for the set of reqs that you are updating.</p> <p>If you select a new recruiter in this field, all selected reqs are updated with your selection.</p>
Manager	<p>If you make no selection in this field, there is no change to the manager selected for the set of reqs that you are updating.</p> <p>If you select a new manager in this field, all selected reqs are updated with your selection.</p>
Req team	<p>If you make no selection in this field, there is no change to the requisition team selected for the set of reqs that you are updating.</p> <p>If you select a new req team in this field, all selected reqs are updated with your selection.</p>

Important: If any of the Recruiter, Manager, or Req team fields is configured as either a “Parent” or “Child” for field association, the field is inactive and displays a message informing users of the field association configuration.



8. Click Save when you are finished.
9. The fields are updated for each selected req.

Recruiter Experience - Recruiters Can Use Employee Referral Search Fields

For users with the Referral status – view privilege enabled, two new search fields are available for selection as candidate search fields: Referral status and Referral status date.

Employee Referral Search Fields

Field	Description
Referral status	<p>A multi-select field which displays the Referral status labels as configured for the client in Workbench. There is no default referral status.</p> <p>You can search on and report on the field, but the field is not “outputable.”</p> <p>Who is returned in the search results when you search on a referral status? Candidates who have a minimum of one of the selected referral statuses as a current referral status and match the rest of the search criteria will be returned in the candidate search results</p> <p>This search field works the same as other fields for Overnight search, Saved search, and Filter folder.</p>
Referral status date	<p>A date range field. The default date which will display in the From field and To field is today’s current date.</p> <p>Candidates who have a minimum of one of their referral status dates within the selected date range and match the rest of the search criteria will be returned in the candidate search.</p> <p>You can search on and report on the field, but the field is not “outputable.”</p> <p>This search field works the same as other fields for Overnight search, Saved search, and Filter folder.</p>

Benefits

KRB users can search for referred candidates using Referral status and Referral status date as search criteria.

Costs

There are no additional costs associated with this feature.

Availability

Release 11

Visible Changes

Users with the Referral status – view privilege enabled can see this change automatically in Release 11.

Limitations and Known Interactions

None

Best Practice Recommendations

None

Overview of Implementation

To include these search fields on your search page, you must select them explicitly when editing your search fields for candidate searching. See page 50 for detailed instructions.

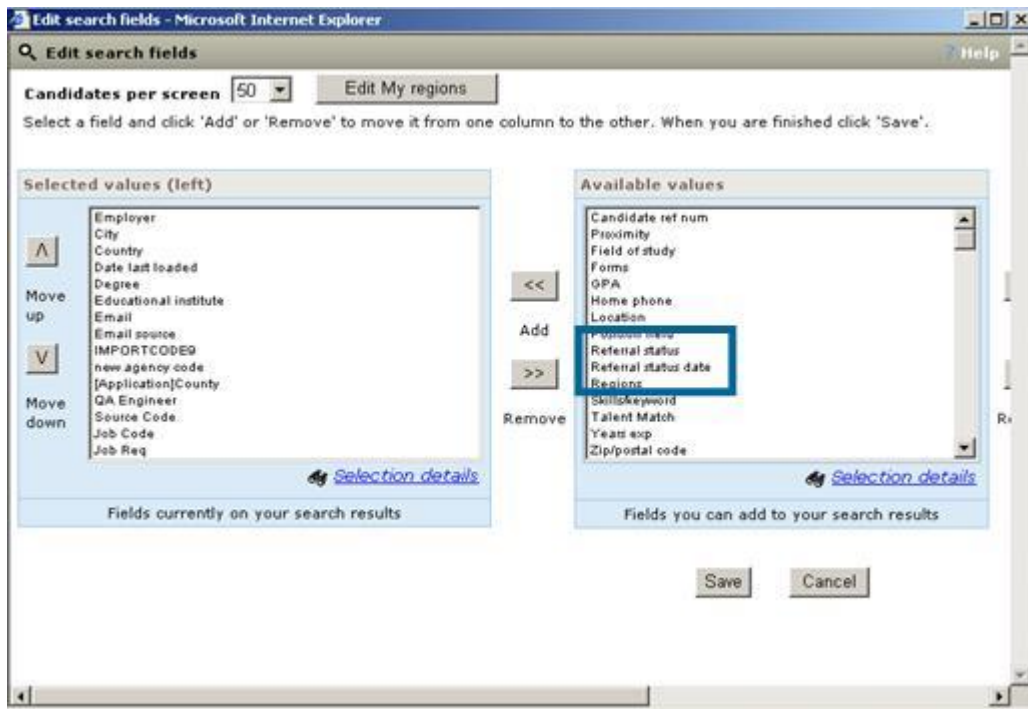
KRB User Experience

To use the referral status fields, you must first add them to your search criteria on Search and Filter Folder pages.

Adding Referral Status Fields to Your Search Fields

To add these fields to your search pages:

1. On the search page, click the Edit output fields button.
2. The Edit search fields window opens.



3. Select Referral status and Referral status date in the Available values box.
4. Click the Add button to move them to either the Selected values (left) or Selected values (right) box.
5. Use the Up and Down buttons to move the position the fields in the Selected values list.
6. Click Save.
7. The search/filter folder page reloads, displaying the two referral status fields in the order you selected.

Candidate Search page with Referral status fields added

The screenshot shows the 'Candidate Search' page in a web application. The page has a navigation bar with 'Reqs', 'Candidates', 'Reports', and 'Admin' tabs. Below the navigation bar are search controls: 'Search criteria', 'Save search', 'Edit search fields', 'Edit output fields', and 'Lead saved search'. The search criteria section includes fields for 'Last name', 'First name', 'Referral status' (a dropdown menu with options: All, Approved, Bonus paid, Disapproved, Expired), and 'Referral status date' (with 'From' and 'To' date pickers). Other search criteria include 'Application', 'County', 'Zip/postal code', 'Date last loaded' (with 'Days back' set to 30 and date pickers for 'From' and 'To'), and 'GPA'. The 'Referral status' dropdown and its date field are highlighted with a blue box.

View search criteria window with Referral status fields

The screenshot shows the 'View search criteria' window in Microsoft Internet Explorer. The window title is 'View search criteria - Microsoft Internet Explorer'. The window content displays the search criteria that were selected in the previous screenshot. The criteria include: 'Date last loaded' (From: 6-Jan-2007, To: 5-Feb-2007), 'Candidates per screen' (50), 'Select candidate type(s)' (All), 'Language' (English (US)), and 'Job Code' (S214-CIO test code). The 'Referral status' field is highlighted with a blue box, showing the selected values: 'Bonus paid' and 'Hired'. Below the 'Referral status' field is the 'Referral status date' field (From: 6-Jan-2007, To: 5-Feb-2007). An 'OK' button is located at the bottom of the window.

Recruiter Experience - Recruiters have Quick Access to Filter Folders

In KRB, users with the appropriate user privileges can configure their Welcome Screen to display a content panel from which to filter requisitions. When this panel is configured, you can “quick-filter” selected req folder(s) for candidates in the selected HR Statuses from within the content panel on your Welcome screen.

Individual users must configure the Filtered reqs panel for the Welcome screen. See page 67 for more information.

Benefits

Users have quick access to candidates of the designated HR statuses within a req folder.

Costs

There are no associated costs with this feature.

Availability

Release 11

Visible Changes

There are no visible changes without configuration.

KRB User Experience

Clients can elect to customize and add content panels to the left and right sides of the Kenexa Recruiter BrassRing “Welcome Screen.” These customized panels can provide easy access to commonly used KRB functions.

The Welcome Screen accommodates a total of six panels, three on each side. Part of the center panel is reserved for Kenexa to communicate with clients and is not customizable. Other areas are reserved for specific messages from your organization.

With Release 11, clients can create a content area right on the Welcome Screen for filtering reqs in selected req statuses and candidates in selected HR statuses. to display for the Filtered req option that displays on the Welcome Screen.

Configure the Filtered Reqs Content Panel for the Welcome Screen

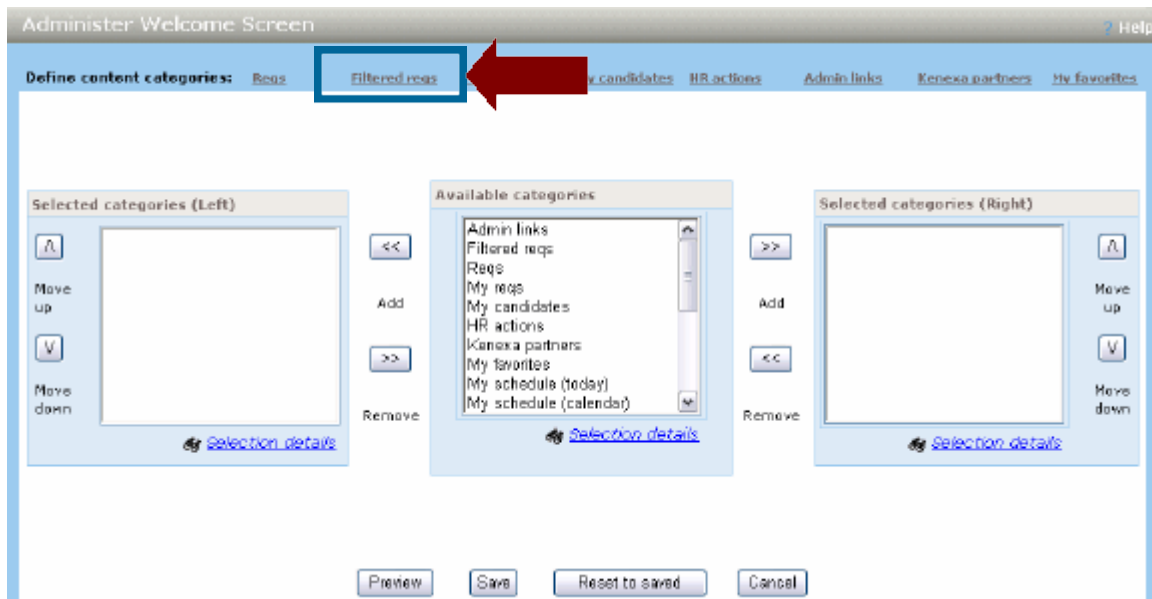
To select criteria for the filtered req retrieval panel:

1. Navigate to Admin > Welcome Screen admin.

2. The Administer Welcome Screen page displays. This is where you select the contents of your Welcome Screen panels.

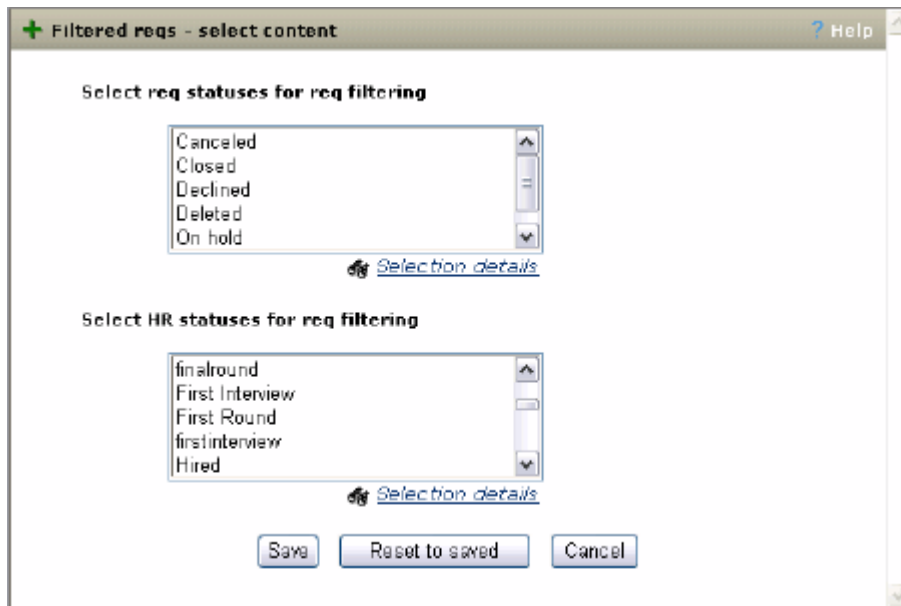
Define criteria for content categories first, before you select categories as panels on your Welcome Screen.

The Welcome Screen supports up to six panels that are customizable by the client. On this page, you can therefore define the attributes for up to six (6) content categories. These content categories correspond to the six panels. (You can have fewer panels on your Welcome Screen if desired.)

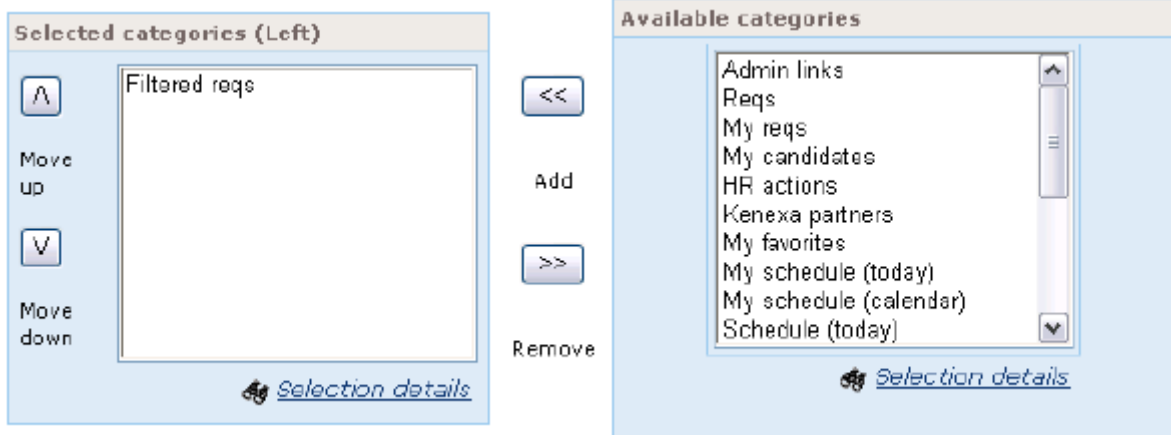


You must define the specific characteristics for your content panels before selecting the categories for display on your Welcome Screen. This means you must select the criteria for “Filtered reqs” before you move “Filtered reqs” from the Available categories list to one of the Selected categories lists on the Administer Welcome Screen. Therefore, click on the link for the new content category Filtered reqs in the Define content category area.

3. The Filtered reqs – select content window opens.

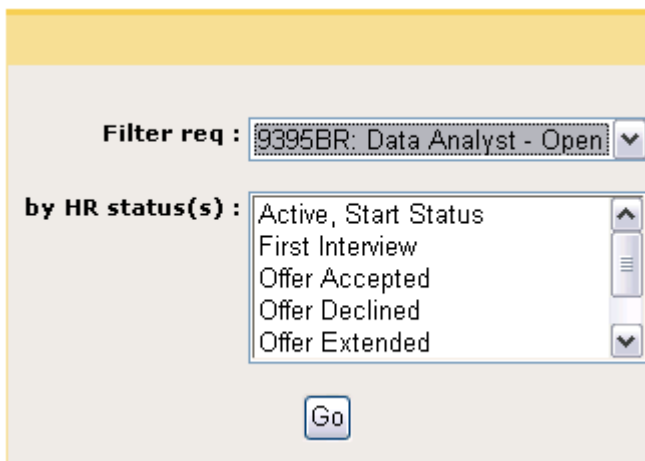


4. Select req statuses and HR statuses for your req filtering panel. These selections tell KRB how to filter a specific req folder so that candidates in the selected HR statuses are returned.
 1. Select one or more req statuses that will be used by the system to retrieve your filtered reqs. To select more than one status, hold down the **Ctrl** key while selecting each individual status.
 2. Select one or more HR statuses for req filtering. To select more than one status, hold down the **Ctrl** key while selecting each individual status.
5. Click **Save** when you are finished.
6. The window closes.
7. On the **Administer Welcome Screen** page, select the **Filtered reqs** category in the **Available categories** list and click the double arrows to move it into the **Selected categories** list (Left or Right).
8. In the screen capture below, **Filtered reqs** was moved to the **Selected categories (Left)** list. The **Filtered reqs** panel will display in the top left corner of the **Welcome** screen.



9. Click *Preview* to see what the Filtered req panel will look like on the Welcome Screen. The Filtered req panel displays two fields: Filter req (a single select list) and by HR status (a multi-select list box).

To see the list of reqs in the Filtered reqs panel, you must have “all reqs” privileges, or you must have “my reqs” privileges and be a req team member.



The Filter req field displays in the dropdown list all requisitions in the configured HR statuses:

The HR status field displays the HR statuses as configured on the Filtered reqs – select content window.

10. Select criteria for both fields and click *Go*. KRB displays the req folder with a filtered view of the candidates in the selected HR statuses.

11. Click *Save* when you are finished.

12. Repeat this procedure for each of the content categories you want to display as panels on your Welcome screen, for a total of six (6) panels, if desired.

Recruiter Experience - Req and Candidate Grid Usability Enhancements

With Release 11, Kenexa continues to improve Recruiter experience through enhancements to usability. This section summarizes the changes and enhancements. See the next several sections for a detailed description of each feature.

All existing candidate and requisition output grids within KRB support drag and drop column placement, dynamic column resizing, and advanced sorting. Please see page 94 for examples.

■ On all candidate and requisition grids, you can manipulate the output grid as follows:

- Drag and drop columns to rearrange them
- Freeze / unfreeze column headers
- Resize columns dynamically
- Hide / show standard columns
- Save your layout for future use on the spot

■ For requisitions, you can select the default set of output fields to display on req output grids.

Please note that in previous releases users (assuming the appropriate privileges) could edit output fields for candidate grids, including candidate grids generated from inside a req folder.

How does this work?

Your organization chooses a default set of candidate grid and requisition grid output fields at implementation time. This is the default set of columns available to all users prior to the assignment of user type privileges.

You can further reduce the set of output fields that display as columns on both candidate and requisition grids to a set of output fields that work best for you.

When making these selections, you are narrowing down the number of columns on your grids to the ones you really need, and excluding columns that you do not use.

■ For both types of output grid, you can use multi-sort options for sorting grid columns. You can configure any column that you can see as one of three multi-sort criteria for sorting columns:

- Configure up to three (3) sorting criteria (multi-sorts) to be used in succession for sorting columns.
- Save your favorite multi-sort configuration as the default. You can change it at any time if your needs change.

- Use different multi-sort configurations on the fly, if desired. You can select different multi-sort criteria without affecting your saved default. If you find a set of criteria that works better for you, you can change the saved default.

- For candidate output grids, including candidate grids within req folders, you can create quick-filter lists from HR status and Candidate type options, and filter on the spot.

Benefits

These usability enhancements are part of our continuous effort to respond to the Kenexa Recruiter BrassRing user community. KRB users can customize the display of requisition and candidate output grid columns and use flexible methods to sort and filter them.

Costs

There are no additional costs associated with this feature.

Availability

Release 11

Visible Changes

As a result of this enhancement there are several changes in KRB that are immediately obvious to KRB users. See the next several sections for a description of these changes.

Limitations and Known Interactions

- For requisition output grids, KRB users can select a maximum of ten (10) custom req fields for display as output columns.
- All standard candidate fields for which the user has privileges are selected by default in the Selected values field and display the client's configured field label.
- Frozen columns cannot be saved in the "frozen" state; they revert to the "unfrozen" state when you navigate away from the page.
- Quick filtering is available on candidate output grids within the Candidates Module, and from candidate output grids accessed from within a req folder. Users can set up and use quick filter lists for HR status and Candidate type columns only.
- HR status (click to update) applies only to grids within Folders and My candidates.
- Codes and Folder apply only to the My candidates grid.
- Users cannot configure output fields for the View req defaults and View my drafts output grids.
- When users choose to sort a list manually based on an output column, the output is based on the selected column only. The remaining sort settings are ignored.

Best Practice Recommendations

Kenexa recommends that users set the basic order of columns on a candidate or requisition output grid by editing the output fields.

Users can work directly from the grid, moving around any column that is visible on the page to any other position that is visible on the page, except for the `Select` column which is fixed in place.

Overview of Implementation

These enhancements are automatically available in Release 11 to KRB users with the appropriate privileges.

User Experience

In Kenexa Recruiter BrassRing, when users are working on candidate pages, or on a candidate grid within a req folder:

- KRB users can click the `Edit output fields` button to select and order the fields they want to display on their candidate output grids.
- KRB users can click `Sort options` on a candidate grid output page to configure multi-sort options for their candidate output grids, apply them, and/or save them as defaults for future use.
- KRB users can set up temporary “quick filter” lists for `HR status` and `Candidate type` when working on pages displaying candidate output grids. These lists are lost when the KRB user navigates away from the page.

When working on requisition pages:

- KRB users can click the `Edit output fields` button to select and order the fields they want to display on their requisition output grids.
- KRB users can click `Sort options` on a req output grid page to configure multi-sort options for their requisition output grids, apply them, and/or save them as defaults for future use.

Enhanced Output Grid Usability

The changes described in this section affect both candidate and requisition output grids. Where necessary, we point out differences between the two types of output grids as well.

With Release 11, the column headers are fixed in place, so you can see column titles even when you scroll down the page.

You can resize, reorder, freeze, un-freeze, hide and un-hide columns on candidate and requisition output grids.

When new KRB users visit a page with the candidate output grid and req output grid for the first time, the set of output fields available to them comes from their organization's default configuration for each of those fields sets. They can rearrange this default layout and save it by clicking **Save output fields** before they navigate away from the page.

When existing KRB users visit a page with the candidate output grid, their candidate output grids will retain their existing output field preferences which they may have set in previous releases. When existing KRB users visit a page with the req output grid, the set of output fields available to them comes from their organization's default configuration for the set of req fields available to all users.

Making Columns Visible within Your Output Grids

You can take the actions described in this document only on columns that are visible on candidate and req output grids. As long as you have the appropriate privileges, you can select which columns should be visible by default on your candidate and req grid pages, and assign an order to them.

To make a column visible on your grid to begin with, you must change its default position using the **Edit output fields** window. Move the columns you work with most frequently into the first several positions.

Then when you are working on the actual grid, if you find that you want to change the column layout for those visible columns, you can do so directly on the grid.

To edit output fields for output grids, click the **Edit output fields** button on the output grid page. See page 101 for information about editing output fields for candidate grids; see page 108 for information about editing output fields for requisition grids.

Saving Your New Grid Layout On the Spot


Important! If you make changes to your grid layout and you want to keep them, you must click **Save output fields** before you navigate away from the page, or your changes will be lost.


When you are satisfied with your grid layout, click **Save output fields** before you navigate away from the page.


Fixed Column Header

The column header is fixed and always visible. Accordingly, you always know which column you are looking at, even when you scroll far down the page.




 Sort icons: Click the icon pointing upward to sort in ascending order. Click the icon pointing downward to sort in descending order.


 Horizontal Pushpin: Column is frozen

 Vertical Pushpin: Column is unfrozen

Freeze a Column

 Click the vertical push pin in the column header to freeze a column. Note: Clicking Save output fields does not save a column in the frozen state; columns always revert back to being “unfrozen” when you navigate away from the page.

Un-freeze a Column

 Click the horizontal push pin in the column header to freeze a column.

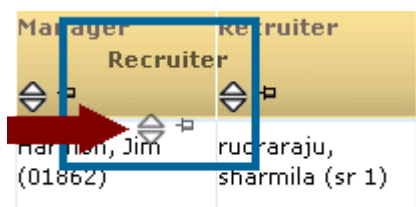
Move a Column

You move all movable grid columns by dragging and dropping them on the grid. Note: You can move only those columns that you can see in the grid, and you can move them only to positions you can see.

To move a column:

1. Position the pointer on the column title you want to move and select it by clicking the left mouse button.

A duplicate, movable image of the column title, the sort icons, and the pushpin appear.



2. Drag the column to the desired position on the output grid. A red arrow appears on the left border of the new column position.

	Manager	Recruiter
ant	Harmon, Jim (01862)	rudraraju, sharmila (sr 1)

3. Stop pressing the left mouse button. The column drops into place.

Title	Recruiter	Manager
Jr. Assistant Birder	rudraraju, sharmila (sr 1)	Harmon, Jim (01862)

Resizing and Hiding Columns

You can hide a column completely by resizing it to having such a narrow width that it does not display. However, you can tell that a column is hidden by its thicker border, as shown in Step 4 below.

To resize a column:

Manager	Req folder
Harmon, Jim (01862)	

4. Using the mouse, position the cursor in the header column on the border to the right of the column you want to resize.

5. Click the right mouse button.

6.

7. A black vertical bar appears. It is aligned with the right border of the column you want to resize.

Recruiter	Manager	Req folder
rudraraju, sharmila (sr 1)	Harmon, Jim (01862)	

Recruiter	Manager	Req folder
rudraraju, sharmila (sr 1)	Harmoh (01862)	

8. Keeping the right mouse button depressed, drag the black vertical bar to the left, making the column the width you want it to be.

Copying and Pasting Grid Columns

To copy and paste the output grid:

1. On the page displaying the output grid you want to copy and paste, click somewhere in the output grid.
2. Click the right mouse button to display the list of options and select **Select all**.
3. The output grid is selected.
4. Type the key combination **Ctrl+C**, or in the browser window, select **Edit > Copy**.
5. Open the target document.
6. Position the cursor in the location where you want to paste the output grid.
7. Type the key combination **Ctrl+V**, or in the browser window, select **Edit > Paste**.
8. Edit the output grid within the target document as necessary.

Candidate Output Grids

As described in the previous section, KRB users can manipulate columns on candidate output grids and perform other actions to change how candidate output grids display and behave. The changes last throughout the session (from login to logout).

Candidate output grids have three new buttons:

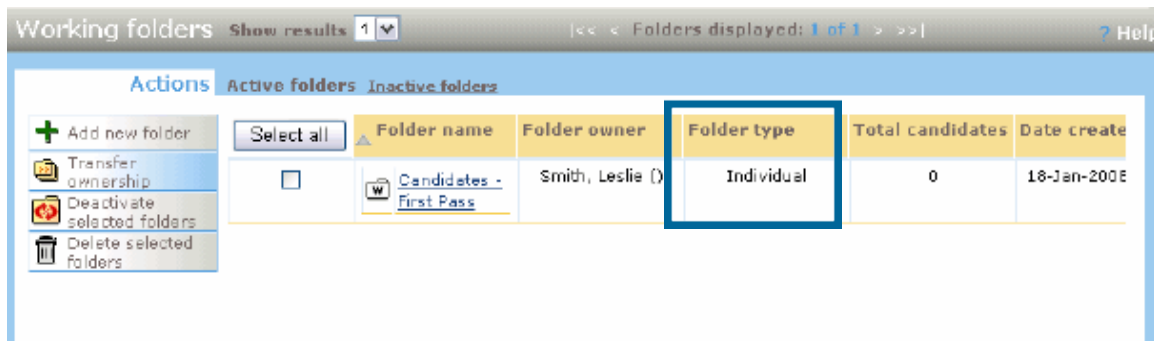
- **Sort options:** Click this button to select multiple criteria for sorting columns on the grid. See page 102 for more information.
- **Set quick filters:** Click this button to select filters to use on the spot for the HR status and Candidate type columns. See page 104 for more information.
- **Save output fields:** Important! Click this button to save the current sort order, column width, and column order for future use before navigating away from the page. (You can always change the arrangement of the columns and save them again). Saving the current column arrangement overrides the default setting selected under the **Edit output fields** option.

When new KRB users visit a page with the candidate output grid for the first time, the set of output fields available to them comes from their organization’s default configuration for each of those fields sets. They can rearrange this default layout and save it by clicking Save output fields before they navigate away from the page.

When existing KRB users visit a page with the candidate output grid, their candidate output grids will retain their existing output field preferences which they may have set in previous releases.



The Working folders output grid has a new sortable column, Folder type. There are two types of folders, Individual or Team.



Edit Output Fields for Candidate Grids

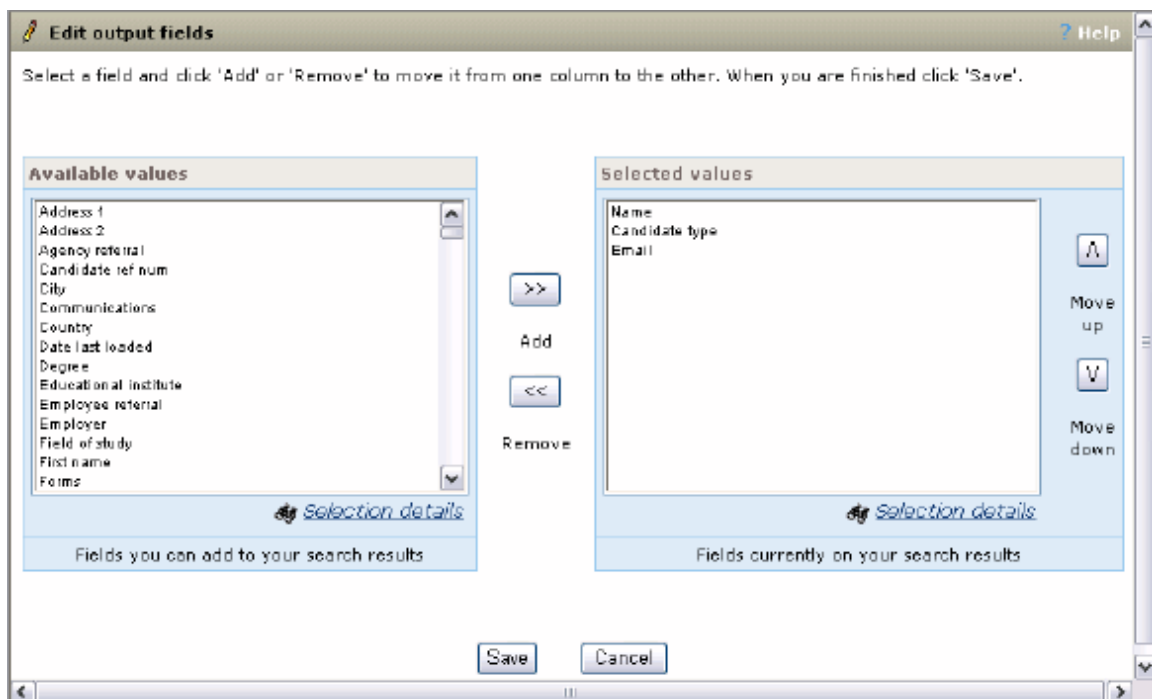
As in previous releases, you can edit output fields for use on candidate output grids.

[Note: The ability to edit output fields was available in previous releases for candidate output grids, including candidate output grids inside of req folders. With Release 11, users with the appropriate privileges can edit output field for req output grids as well.]

Once you have edited output fields for your candidate and/or requisition grids, you can configure multi-sort options for sorting columns on your grids. See page **Error! Bookmark not defined.** for more information about configuring multi-sort options.

For your convenience, this section reviews how to edit output fields for candidate grids:

1. Click the **Edit output fields** button on the candidate grid page.
2. Select the desired fields in the **Available values** box. The **Available values** box contains standard fields and custom fields for which the user has privileges.
3. Click the double right arrows **>>** to move them into the **Selected values** box.
4. Use the up and down order to change the order of the items in the **Selected values** box.
5. Click **Save**.
6. The fields in the **Selected values** box display as columns on the candidate output grid in the order in which they are listed in the box.



If you move any standard column field from the **Selected values** box back to the **Available values** box, the field display sorted alphabetically and no longer appears on the candidate output grid.

The list of available fields on the **Edit output fields** window includes all the standard and custom candidate fields for which you have user privileges.

The standard candidate output field values are: Viewed, Agency referral, Employee referral, Notes, Forms, HR status, Candidate type, HR status (click to update) candidates, HR status date, Updated by, Last codes, Codes, and Folder.

- HR status (click to update) applies only to candidate output grids displayed within **Folders** and **My candidates**.

- Codes and Folder apply only to “My candidates” grids.

The custom candidate output field values include all custom fields which your organization has configured as “outputable.”

Note: The Select all column always displays as the first column in all output grids. You cannot select or de-select the Select all column for your output grid.

Configure Multi-Sort Options for Candidate Output Grid Columns

You can set up multi-sort options for sorting output grid columns and use them on the fly, or save them as defaults.

The procedure is the same for configuring the multi-sort options for both candidate and requisition grids. Candidate and requisition field output grids contain different fields, so your choices for sorting the columns of each type of grid are different.

You can set up a maximum of three column sort values for use on your candidate and/or requisition output grids. You can select the column sort values for sorting on the spot in your current session without saving the criteria, if desired. Alternatively, you can select column sort values and save them as default criteria for sorting a particular type of output grid in the future.

When you make selections for multi-sort columns, the sorting criteria you select apply to the entire set of results on the output grid.

To configure multi-sort options for sorting grid output columns:

1. Click the Sort options button above the output grid.
2. The Edit sort options page displays.

Multi-sort columns

Sort by: Position title Ascending Descending
[Selection details](#)

Then by: Company Ascending Descending
[Selection details](#)

Then by: Ascending Descending
[Selection details](#)

Column sort defaults

Sort by: Position title, Ascending
Then by: Company, Descending
Then by:

Apply Apply and save as default Save as default Reset to default Cancel

3. Select up to three (3) criteria for sorting the output grid results. For each criterion, select the radio button for either the *Ascending* (123/abc) or *Descending* (321/cba) order. The default sorting order is *Ascending*.

All three values must be different; if they are not, KRB displays an appropriate, context-specific error message.

Sort by: Select the first (1st) criterion to sort the output grid results by. The column selected for the first sort is applied to the entire set of results in the output grid.

Then by: Select the second (2nd) criterion to sort the output grid results by. The column selected for the first “Then by” field is the second sort applied to the entire set of results in the output grid.

Then by: Select the third (3rd) criterion to sort the output grid results by. The column selected for the second “Then by” field is the third sort applied to the entire set of results in the output grid.

4. Click one of the buttons depending on what you want to do with the results:

Apply: When you click this button, the page closes, the output grid refreshes, and the selected sort values are applied for the session* in which you are working with this particular result set. (from the time you log in to the time you log out). The sort values are not saved as the column sort defaults.

Apply and save as default: When you click this button:

- The page closes and the output grid refreshes.
- The selected sort values are applied for the session in which you are working with this particular result set.
- The sort values are saved as the column sort defaults. As a result, each time you navigate to this output grid, the system will apply these column sort default values to the page before it is displayed.

Save as default: When you click this button, the page remains open and the selected sort values are saved as the column sort defaults. Each time you navigate to this output grid, the system will apply these column sort default values to the page before it is displayed.

Reset to default: When you click this button, the page remains open and the most recent saved column sort default values are applied to the page before it is displayed.

Cancel: When you click this button, the system restores the column sort default values that were saved most recently. The page closes and the output grid refreshes, and the system applies the most recently saved column sort default values to the page.

If you click **Apply**, **Apply and save as default**, or **Save as default**, and you have made no selection for, at a minimum, the **Sort by** field, an error message displays.

5. If you clicked a button which results in saving or restoring column sort result values, those values are displayed in the Column sort defaults area of the Edit sort options window.

Quick-Filter Lists: HR Status and Candidate Types

This procedure applies to candidate output grids, including those displaying from within req folders.

You can set up lists to “quick-filter” the HR status and Candidate type columns on candidate output grids, if desired.

Required Privileges

The Select statuses to display in the HR status quick filter list field displays only for users who have the HR Status – view all privilege turned on.

The Select candidate types to display in the Candidate type quick filter list field displays only for users who have Associate to these user types to search privileges for at least one Candidate type.

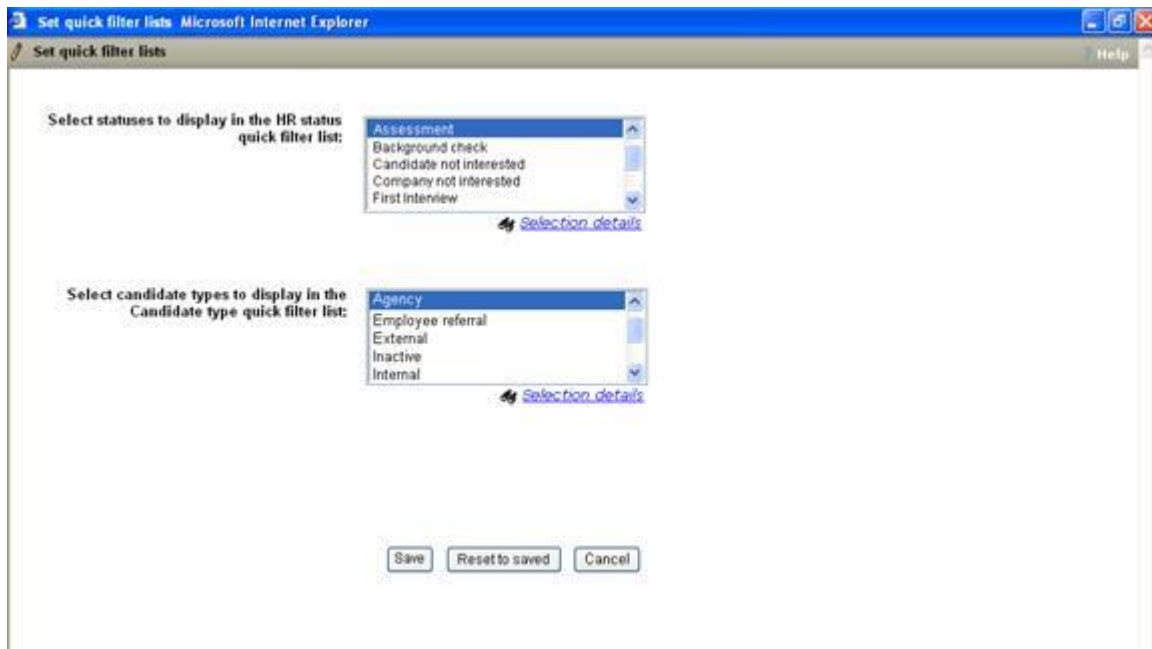
The candidate types selected within this field will display as options within the Candidate type quick filter list

Quick filters apply only when you are sorting columns on the current page; they are not retained throughout the entire session (that is, from login to logout). If you navigate away from the current page, your quick-filter selections are lost and you will have to select them again the next time you are on a candidate grid page that supports Quick filters.

Setting Up Quick Filter Lists

To set up quick filter lists for HR statuses and/or Candidate types:

1. Take an action or navigate to a candidate output grid page.
2. Click the Set quick filters button above the candidate output grid.
3. The Set quick filter lists window pops up.



4. Select HR statuses to display in the HR status quick filter list from the multi-select list box. This field displays only for users with HR Status – view all privilege turned on.
5. Select candidate types to display in the Candidate type quick filter list from the multi-select list box. This field displays only for users who have Associate to these user types to search privileges for at least one Candidate type.
6. Click Save to save the selected values, close the page, and return to the candidate output grid page.

You can also click Reset to saved to restore the most recently saved selections. The page remains open.

Click Cancel to revert to the most recently saved version and close the window without making any changes.

7. Once you have configured either or both of the quick filter lists for HR status OR Candidate type, you will see a down arrow in HR status (Click to update) columns and Candidate type columns respectively. Clicking the arrow displays a multi-select list from which you can choose HR statuses or Candidate types to “quick-filter” the page on the spot.

Rules for HR Status Quick Filter Lists

The Select statuses to display in the HR Status quick filter list field displays only for users with HR Status – view all privilege turned on.

The multi-select field displays all HR Statuses that meet the following conditions:

- The status is active.

- The status is visible within req folders for users of your user type.

By default, all HR statuses are selected.

Once you select HR statuses for this field, your selections display as options in HR status (click to update) quick filter list on candidate output grids that are displayed within folders.

If an HR status is inactivated while you are using the quick filter feature, the list box containing the list of active HR statuses is not updated until the next time you return to the Set quick status filter list page.

If you inactivate an HR status, or you know that an HR status has been inactivated while you were working with the Quick filter feature, close the Set quick filters lists page, navigate away from the page containing the candidate output grid, navigate back to it again, and once more click the Set quick filters button. The list of HR Statuses in the Set quick status filter list page should be updated.

If you select an HR Status in the “Select statuses to display in the HR status quick filter list” field and this HR Status is subsequently set by your KRB administrator to be hidden within req folders for your user type, the HR Status is removed from the list regardless of your current selections for this field.

Rules for Candidate Type Quick Filter Lists

The Select candidate types to display in the Candidate type quick filter list field displays for users with Associate to these user types to search privileges for at least one Candidate type. The multi-select field displays all active candidate types for which the user has this privilege.

The candidate types selected within this field will display as options in the Candidate type quick filter list on Candidate output grids displayed within folders. By default, all Candidate types are selected.

If a candidate type is inactivated while you are using the quick filter feature, the list box containing the list of active candidate types is not updated until the next time you return to the Set quick status filter list page.

Requisition Output Grids

KRB users can manipulate columns on requisition output grids and perform other actions to change how req output grids display and behave, and then save those changes on the spot. The initial set of columns that are visible to you as a user are selected through the Edit output fields option.

Three new buttons are visible to users with the requisite user type privileges.

- Req output grids have a new column, Total candidates.
- Req output grids have three new buttons: Sort options, Edit output fields, and Save output fields.



- Sort options: Click this button to select multiple criteria for sorting columns on the grid. See page 110 for more information.
- Edit output fields: Click this button to open the Edit output fields page. See page 108 for more information.
- Save output fields: Important! Click this button to save the current sort order, column width, and column order for future use before navigating away from the page. (You can always change the arrangement of the columns and save them again). Saving the current column arrangement overrides the default setting selected under the Edit output fields option.

When new and existing KRB users visit a page with the req output grid for the first time, the set of output fields available to them comes from their organization’s default configuration for each of those fields sets. They can rearrange this default layout and save it by clicking Save output fields before they navigate away from the page.

Working Folders Output Grid

The Working folders output grid has a new output column called Folder type. Folders can have a type of Team or Individual. You can sort this column.



Output Fields for Requisition Grids

You can edit output fields for use on req output grids. **[Note: This feature is newly available for req output grids in Release 11.]**

You can add a maximum of ten (10) columns to your req output grids, selecting from a combined list of req standard fields and req custom fields available to you according to your user and group privileges.

Standard Req Output Fields

The following standard req fields always display as columns in the req output grid: Select a req, Req folder, Posting options, and Autoreq Id /Requisition ID. These fields are never available for selection in the Edit output fields window.

Permanent Columns on Req Output Grids

Column	Description
Select a req	You cannot change this column. This field is not available in the Edit output fields page, meaning you neither add nor remove it from the req output grid.
Req folder	You can re-order or hide this column but you cannot remove it from the grid. This field is not available in the Edit output fields page, meaning you can neither add nor remove it from the req output grid.
Posting options	You can re-order or hide this column but you cannot remove it from the grid. This field is not available in the Edit output fields page, meaning you can neither add nor remove it from the req output grid.
Autoreq ID / Requisition ID	You can re-order or hide this column but you cannot remove it from the grid. This field is not available in the Edit output fields page, meaning you can neither add nor remove it from the req output grid.

Standard req fields you can remove, add, and reposition: The following fields are available for removal and repositioning in the Edit output fields window: ReqS:Title, ReqS:Positions remaining, ReqS:Total candidates, ReqS:Manager, ReqS:Recruiter, ReqS:Department, ReqS:Location/Division, and ReqS>Date opened. They are selected by default in the Selected values box.

The ReqS:Total candidates column displays as Total Candidates on req output grids when selected for display. It represents the total number of candidates filed within the req folder. You can sort this column.

Custom Req Output Fields

Custom Req Fields you can add, remove, and reposition: The Available values field also displays all of your organization's custom req fields as long as they meet the conditions described below.

Users can see custom req fields under the following conditions, both of which must be true:

- The custom req field is visible (that is, not hidden) for your user type and language, AND
- The custom req field displays in the Available values field because your organization designated it as outputable when adding it to your system.

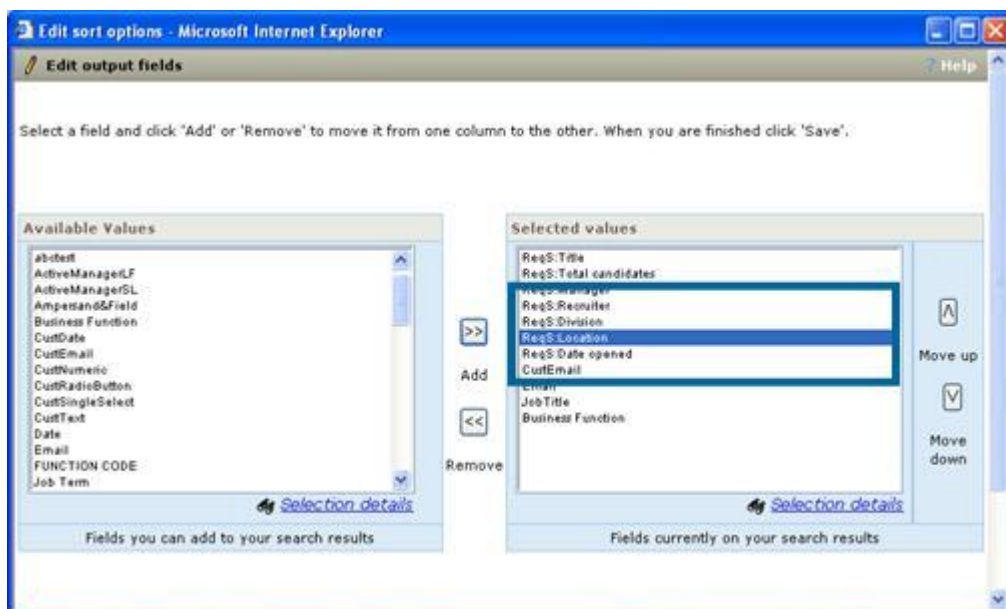
You can add a maximum of ten (10) columns to the Selected values box.

Edit Output Fields for Requisition Grids

This is a new feature in Release 11.

To edit output fields for req output grids:

1. Click the Edit output fields button on the req grid page.
2. The Edit output fields window displays.



3. Select the fields you to remove in the Selected values box.
4. Click the double left arrows to move them to the Available values box.

If you move any standard column field from the Selected values box back to the Available values box, the field displays sorted alphabetically and no longer appears on the req output grid.

If you move any custom column fields in either direction, the field is added to the bottom of the list in the order in which you moved it.

5. Select the fields you want to include on the req output grid in the Available values box, including custom req fields.

If you add more than (ten) 10 custom req fields to the Selected values box, KRB displays the following error message when you click Save: “A limit of 10 custom req fields can be configured to display as output columns. Please decrease your custom req field selection.”

6. Click the double right arrows to move them to the Selected values box.
7. Use the up and down arrows to change the order of the items in the Selected values box.
8. Each field in the Selected values box displays as a column on the Req output grid in the order in which they appear in the Selected values box.

Configure Multi-Sort Options for Req Output Grid Columns

You can set up a maximum of three column sort values (multi-sort options) for use on your requisition output grids. You can select the column sort values for sorting on the spot in your current session; you can also save them as default criteria for sorting a particular type of output grid in the future, if desired.

When you make selections for multi-sort columns, the sorting criteria you select apply to the entire set of results on the output grid.

To configure multi-sort options for sorting grid output columns:

1. Click the Sort options button above the output grid.
2. The Edit sort options page displays.

Multi-sort columns

Sort by: Position title Ascending Descending
[Selection details](#)

Then by: Company Ascending Descending
[Selection details](#)

Then by: Ascending Descending
[Selection details](#)

Column sort defaults

Sort by: Position title, Ascending
Then by: Company, Descending
Then by:

Apply Apply and save as default Save as default Reset to default Cancel

3. Select up to three (3) criteria for sorting the output grid results. For each criterion, select the radio button for either the *Ascending* (123/abc) or *Descending* (321/cba) order. The default sorting order is *Ascending*.

All three values must be different; if they are not, KRB displays an error message.

Sort by: Select the first (1st) criterion to sort the output grid results by. The column selected for the first sort is applied to the entire set of results in the output grid.

Then by: Select the second (2nd) criterion to sort the output grid results by. The column selected for the first “Then by” field is the second sort applied to the entire set of results in the output grid.

Then by: Select the third (3rd) criterion to sort the output grid results by. The column selected for the second “Then by” field is the third sort applied to the entire set of results in the output grid.

4. Click one of the buttons depending on what you want to do with the results:

Apply: When you click this button, the page closes, the output grid refreshes, and the selected sort values are applied for the session* in which you are working with this particular result set. (from the time you log in to the time you log out). The sort values are not saved as the column sort defaults.

Apply and save as default: When you click this button:

The page closes and the output grid refreshes.

The selected sort values are applied for the session in which you are working with this particular result set.

The sort values are saved as the column sort defaults. As a result, each time you navigate to this output grid, the system will apply these column sort default values to the page before it is displayed.

Save as default: When you click this button, the page remains open and the selected sort values are saved as the column sort defaults. Each time you navigate to this output grid, the system will apply these column sort default values to the page before it is displayed.

Reset to default: When you click this button, the page remains open and the most recent saved column sort default values are applied to the page before it is displayed.

Cancel: When you click this button, the system restores the column sort default values that were saved most recently. The page closes and the output grid refreshes, and the system applies the most recently saved column sort default values to the page.

If you click **Apply**, **Apply and save as default**, or **Save as default**, and you have made no selection for, at a minimum, the **Sort by** field, an error message displays.

5. If you clicked a button which results in saving or restoring column sort result values, those values are displayed in the Column sort defaults area of the Edit sort options window.

Using a Date Field as a Multi-Sort Option

When you use a date field as one of your multi-sort criteria, the sort results returned to you in the output grid in KRB show only the date stamp and do not include a visible time stamp.

However, when the System performs the sort, it includes the timestamp to the millisecond in addition to the date stamp in its sorting criteria even though you cannot see the time stamp portion of “Date opened”.

In the example below, we selected three (3) sort options: Manager, Date opened, and Title. Since the Manager is the same for each requisition, requisitions in the list are sorted based on (1) the date opened and (2) the job title.

The sort results are listed in *descending* order by date in the order of the req opened starting from the latest date and time (that is, the req opened most recently) to the req opened at the earliest date and time within the total set of results.

In the example set of data, all the reqs are for the same Manager, all the reqs were opened on the same date (2003-07-29), and so you would expect the results to be listed in alphabetical order by Title. However, the system sorts the results based on a timestamp that includes Date and Time of day to the millisecond. Therefore, the sort results below list reqs in the order in which they were opened from most recent to least recent on that day. If you were looking at these results in the KRB output grid, you would see the date only with no time included, but the results would actually be sorted by the time (to the millisecond) as well as the date.

Job Title Date opened

```
=====
Customer Account Executive I 2003-07-29 10:55:24.817
Manager Customer Service 2003-07-29 10:45:52.223
Customer Account Executive I 2003-07-29 09:28:09.863
Customer Account Executive I 2003-07-29 09:18:33.783
Co-op 2003-07-29 08:49:35.253
```

Req View Changes

With Release 11, the information provided on the Req details page is summarized on two tabs: Req detail and Req history. The Req history tab displays the (former) “Job req history” section.

All users with privileges to view reqs can see the Req details and Req history tabs.

With Release 11, requisitions viewed in Kenexa Recruiter BrassRing can also have an Attachments tab and a Forms tab. See Req attachments on page 115 and Req subsidiary forms on page 131 for more information.

Benefits

Information about the req is categorized and summarized more efficiently, and clients can grant more selective access to each part of the req.

Cost

There are no additional costs associated with this feature.

Availability

Release 11

Visible Changes

There are visible changes without configuration for this feature. Please see the description of the feature for more information.

Limitations and Known Interactions

None

Best Practice Recommendations

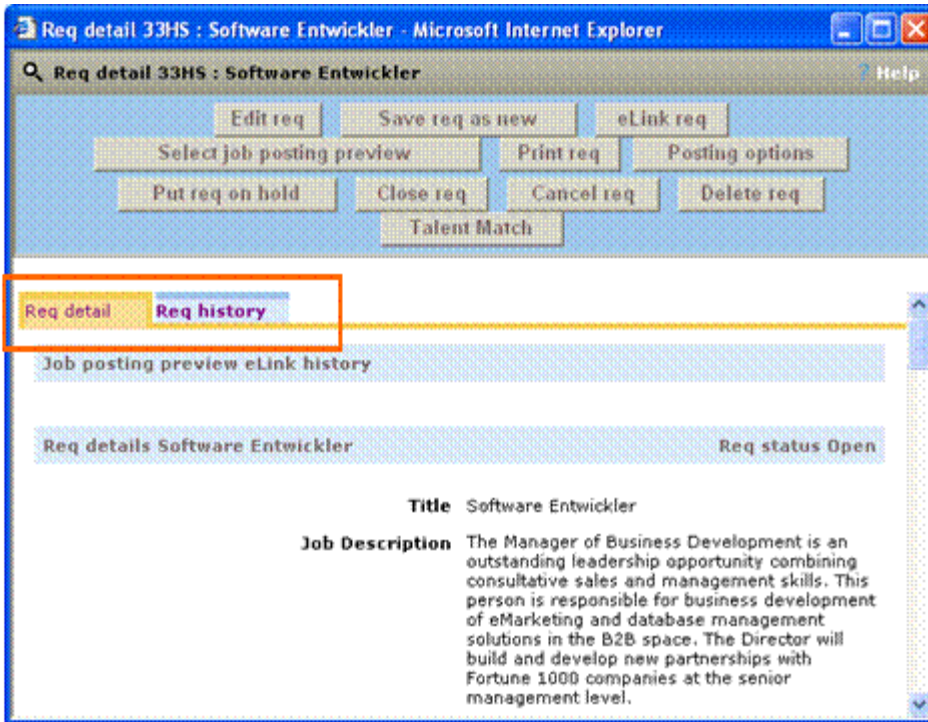
None

Overview of Implementation

These changes are included automatically with Release 11.

KRB User Experience

KRB users see the Req detail and Req history tabs on each req for which they have privileges to view.



Recruiter Experience - Req Attachments

With Release 11, recruiters can add and delete attachments to and from their requisitions. Req attachments work similarly to candidate attachments, except that attachments are associated with a requisition rather than a candidate.

Users with either or both of the “All reqs” or “My reqs” user privileges can take some or all of the following actions, depending on the combination of privileges they have:

- View req attachments
- View attachments from a new column in the req output grid
- Upload req attachments
- Delete req attachments
- Add req attachments
- Remove req attachments
- eLink req attachments
- Insert req attachment(s) in candidate e-mails using a new req token for req attachments
- Report on req attachments using a new DEW field for req attachments

Benefits

Recruiters can add attachments with additional information to their reqs, e-mail and eLink them, report on them, and access them from appropriate locations within KRB. A req attachment might include req-specific interview questions or a place to track job board searches to comply with the OFCCP internet applicant regulation.

Costs

There is no additional cost for the feature itself. There may be costs for the storage requirements associated with this feature.

Availability

Release 11

Visible Changes

There are visible changes for end users associated with this project without configuration and user privileges.

In KRB, req information on the Req details page is summarized on two tabs: Req detail and Req history. The “Job req history” is now stored on the Req history tab.

New Req tabs



Limitations and Known Interactions

The req attachments feature does not extend to req import and req export:

- Reqs can not be imported with attachments.
- Reqs can not be exported with attachments.

Users cannot upload attachments to reqs while creating or editing a req, job code default and/or “My req” templates.

Details



Supported Attachment File Types

Req attachment files can have the following extensions:

Extension	File Type
.bmp	Graphics file format
.csv	Comma Separated Values; used for spreadsheet data
.doc	Microsoft Word document
.gif	Graphics file format; best for screen captures
.htm	Hypertext Markup Language (older version)

.html	Hypertext Markup Language (newer version)
.jpg	graphics file format; best for photographs
.ppt	Microsoft Powerpoint file
.pdf	Portable Document Format
.rtf	Rich Text Format
.tif	Graphics file format
.txt	Plain (ASCII) text file
.xls	Stylesheet for XML documents
.xml	XML document

Turning Off Req Attachments

	If a minimum of one user type has <i>one</i> of the Req Attachment user privileges turned on, the No option is disabled for the client setting Req Attachments. Workbench informs you in a tooltip that: “At least one user type has one of the req attachment privileges turned on”.
	If a minimum of one req form in the client’s KRB instance has the Display req attachment tab and attachment column icons field set to Yes, the No option is disabled for then client setting Req Attachments. Workbench informs you in a tooltip that: “At least one req form has req attachments turned on”.

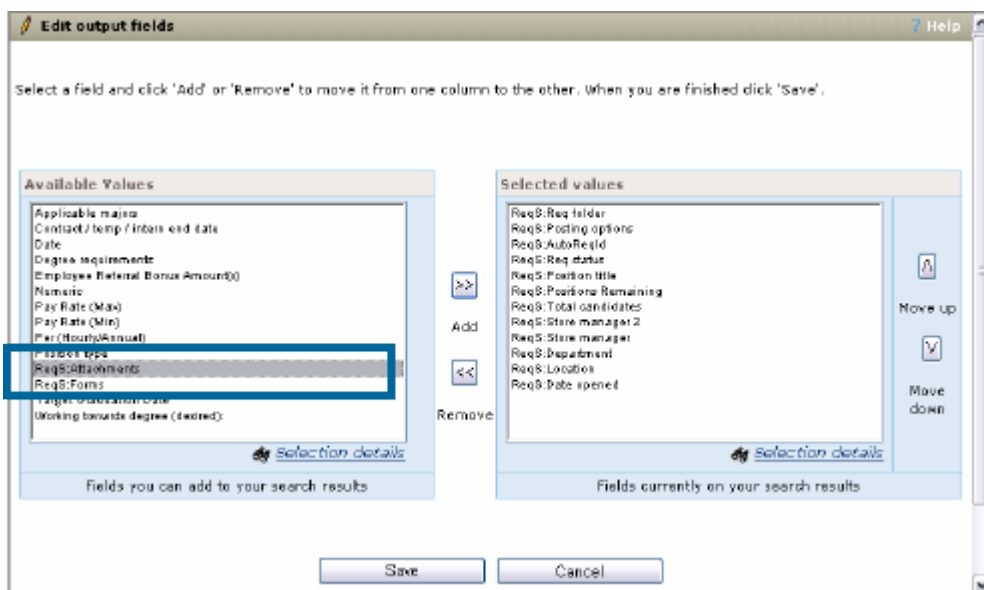
Overview of Implementation

This feature is enabled through a number of settings in Workbench. In addition, Certified Workbench Users or Kenexa will have to associate attachments and attachment categories with req templates and assign appropriate user type privileges for working with req attachments.

The major steps for configuring Req attachments are:

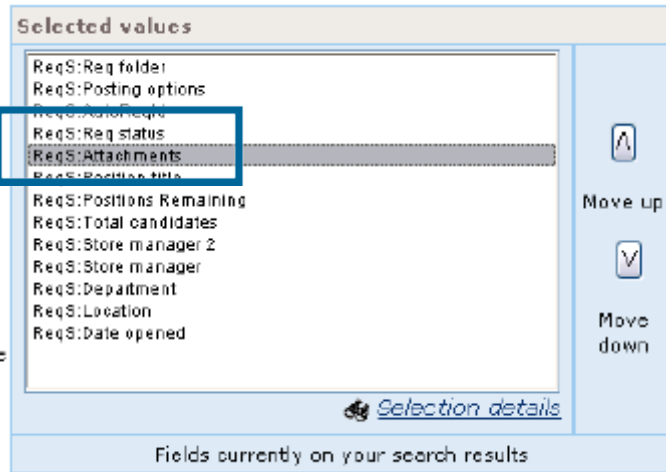
1. Kenexa: Update the client setting Maximum attachment storage to a larger amount to include storage for req attachments if necessary.
2. Kenexa: Set the client setting Req Attachments to Yes.
3. Kenexa: Set the client setting Req attachments file size (mb).
4. Kenexa or Certified Workbench Users: Configure Attachment categories for use with req attachments.
5. Kenexa or Certified Workbench Users: Configure new attachment settings on individual req templates:
 - Display attachments tab and attachment column icons
 - Number of attachments
 - Max size per attachment (mb)

- Attachment Categories
6. Kenexa or Certified Workbench Users: Turn on user type privileges associated with Req attachments functionality:
- All reqs – attachments add, All reqs – attachments delete, and All reqs – attachments view
 - My reqs – attachments add, My reqs – attachments delete, and My reqs – attachments view
7. Kenexa Recruiter BrassRing users: Edit output fields to include the Attachments column on req output grids:
- a) Navigate to a requisition output grid (for example, select Reqs > View all reqs > Open).
 - b) Click the Edit output fields button.
 - c) The Edit output fields window opens.



Because you have gone through the previous enablement steps for Req attachments, the field ReqS:Attachments is now available for selection in the Available Values list.

- d) Select it and click Add >> to move it to the Selected values list.
- e) Use the up and down arrow keys to position ReqS:Attachments in the Selected values list. The first value in the list corresponds to the first column on the req output grid. The Attachments column will be the fifth (5th) column on the req output grid in KRB.



- a. Click Save when you are finished.
- b. In Kenexa Recruiter BrassRing, the Attachments column is included as the fifth (5th) column on the req output grid:

Select all	Req folder	Posting options	AutoReqId	Attachments
<input type="checkbox"/>			182BR	
<input type="checkbox"/>			186BR	+
<input type="checkbox"/>			33HS	
<input type="checkbox"/>			27HS	
<input type="checkbox"/>			180HS	
<input type="checkbox"/>			179HS	
<input type="checkbox"/>			179HS	

KRB User Experience

KRB users will see changes in several screens reflecting the ability to affix attachments to requisitions when the appropriate client settings and user privileges are enabled. See the effects of combined client settings and user type privilege settings in the table below.

Settings and Visibility of Req Attachments Functionality

Screen Object	User Type Privilege or Client Setting
---------------	---------------------------------------

	FOR USER TYPE TO SEE THE SCREEN OBJECT, ENABLE <input checked="" type="checkbox"/> THE PRIVILEGE OR SETTING LISTED:	TO PREVENT THE USER TYPE FROM SEEING THE SCREEN OBJECT, DISABLE <input type="checkbox"/> THE PRIVILEGE OR SETTING.
Attachments column	<input checked="" type="checkbox"/> All reqs – attachments view <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> My reqs – attachments view <input checked="" type="checkbox"/>	<input type="checkbox"/> All reqs – attachments view <input type="checkbox"/> My reqs – attachments view
Req attachments tab	<input checked="" type="checkbox"/> Display attachments tab and attachments column icons	<input type="checkbox"/> Display attachments tab and attachments column icons
Req attachments icons (Add or Notes)	<input checked="" type="checkbox"/> Display attachments tab and attachments column icons	<input type="checkbox"/> Display attachments tab and attachments column icons
Req attachment icons (Add or Notes)	<input checked="" type="checkbox"/> My reqs – attachments view privilege <input checked="" type="checkbox"/> User is a member of the Req team	<input checked="" type="checkbox"/> My reqs – attachments view privilege <input type="checkbox"/> User is a member of the Req team <input type="checkbox"/> My reqs – attachments view privilege <input checked="" type="checkbox"/> User is a member of the Req team <input type="checkbox"/> My reqs – attachments view privilege <input type="checkbox"/> User is a member of the Req team

The Attachments Column, Icons, and Tab

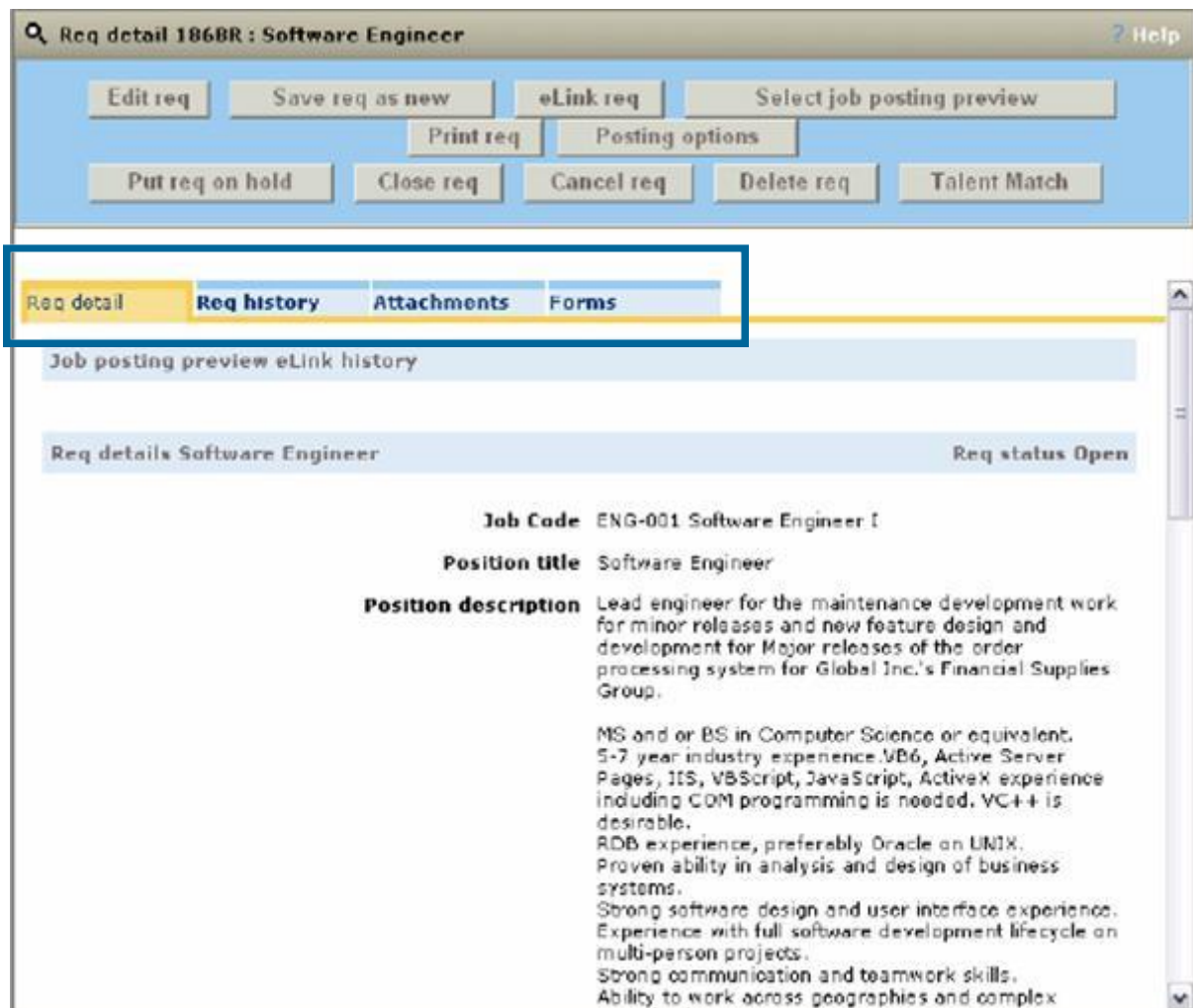
The Attachments column icons display on the “View reqs” output grid in a new “Attachments” column when clients turn on the Req attachments feature. The Attachments tab displays on the Req details page for Req’s that have attachment settings enabled and configured. Only users with the “All reqs and/or My reqs view attachment ” user type privileges can see the column icons and tab.

Attachments	Forms
⊖ □	⊖ □
	+
+	+
	+

New Tabs on Req Details Page

KRB users with the requisite user type privileges can see new tabs on the Req details page for a particular requisition: Req detail, Req history, and Attachments. These tabs are not visible to users when they are adding or editing a req.

All users with privileges to view reqs can see the Req detail and Req history tabs. The Forms tab and Attachments tab are visible only if each respective type of functionality is turned on at the client level and individual users have the appropriate privileges.



Req Detail Tab

The Req detail tab displays all sections of the req except for Req history, Attachments, and Forms.

Req History Tab

The Req history tab displays the (former) Job req history section.

Forms Tab

The Forms tab is described in the section for Req Subsidiary Forms (TBD).

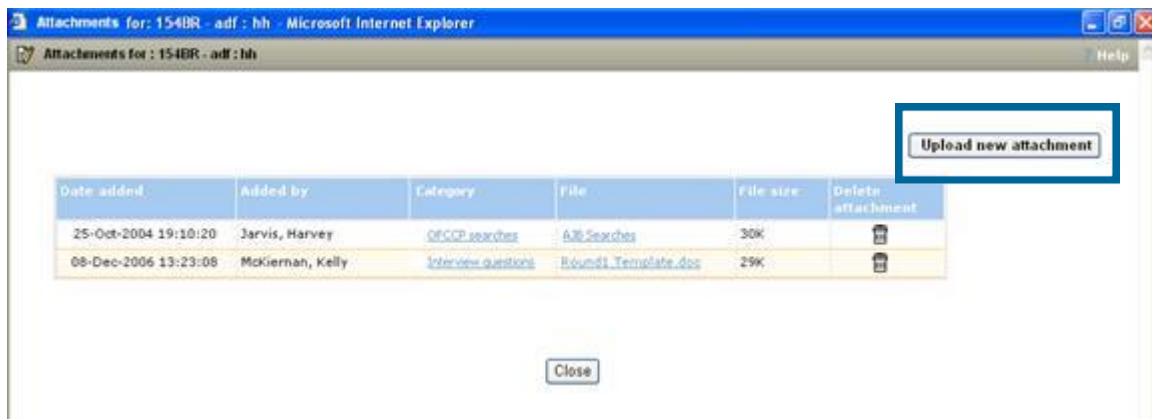
Attachments Tab

The Attachments tab is described in detail in the next several sections.

Viewing Attachments Associated with a Req

When KRB users view the Attachments tab click View attachments or the Attachments icon on the Req output grid, the Attachments for <req ID> page displays.

Attachments for Req ID page



The Upload new attachments button displays only if the user has the appropriate user type privilege turned on.

The Delete icon displays only for those users with either the “My reqs – attachments delete” or “All reqs – attachments delete” privilege turned on.

Attachments Grid

Field	Description
Date added	Displays the date the attachment was added to the req as <dd-mmm-yyyy hh:mm:ss>.
Added by	Displays the user who added the attachment to the req as <Last name, First name>.

Category	Displays the category associated to the req attachment. The category name hyperlinks to the Attachment category page. The hyperlink for the category name displays only for users with either the My reqs – attachments add OR All reqs – attachments add privileges turned on; otherwise the category name displays as static text.
File	Displays the file name as a clickable hyperlink. Clicking the link launches the file.
File size	Displays the size of the attachment file. The file size displays as #K.

Adding / Uploading Attachments

Users must have the All reqs – attachments add OR My reqs – attachments add privileges turned on to see and use the Upload new attachments button.

The Upload attachments page is identical to the page for uploading candidates except that a user must select which languages of the req the attachments should be appear for.

To upload an attachment, follow these steps:

1. On the Upload attachments page, click Browse. The pop-up window for file uploading opens.

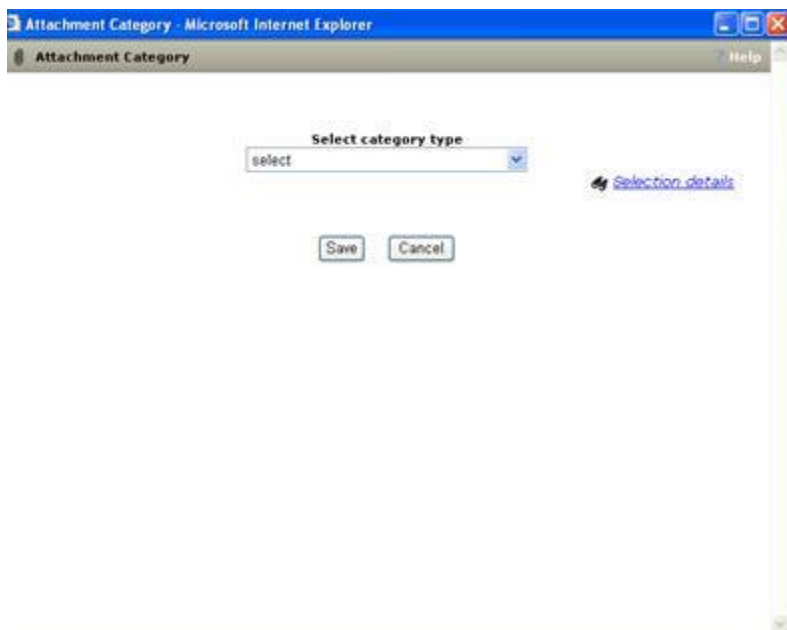
Upload attachments Page for Req Attachment

2. Navigate to the file you want to upload and select it. The file name with its full path name populates the “File #” text box.

3. Select the attachment Category from the dropdown list.
4. Select the language(s) for the attachment. The languages are always those languages that the req was created in. The languages selected in this field determines which languages the attachment displays in on the Attachments tab.
5. Upload another attachment if desired. You can upload up to the maximum number of attachments set for the req form within Workbench
6. Click Upload to upload the currently selected file(s). The confirmation page displays with the following message: “Attachments have been uploaded successfully.”
7. Click OK to close the window and return to the Attachments tab on the Req details page.

Selecting a Category Type for an Attachment Category

When uploading an attachment to a req, you must select a Category for the attachment. The Attachment Category page for req attachments is the same as for candidate attachments. The list of options available to KRB users in the Select category type field consist of the attachment categories configured for the req form.



Error Conditions

If you try to take various actions with attachments but forget to complete a step, KRB displays the error messages listed below according to the error condition.

Error Conditions for Uploading Attachments

If you ...	You get the error message:
Try to upload an 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]

Try to upload 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.
Try to upload an attachment of an unsupported file type.	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]
Fail to select an attachment category before clicking Continue	Select at least one attachment category.
Click Upload when you haven't yet selected a file to be uploaded	You have not entered file(s) to be uploaded. Please select a file. The options will be "OK"
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]

Deleting Req Attachments

Navigate to the req from which you want to delete the attachment and select the Attachments tab and click the **Edit Attachments** button.

On the Attachments for Req ID page, locate the attachment you want to delete within the Attachments grid and click the Delete icon in its row.

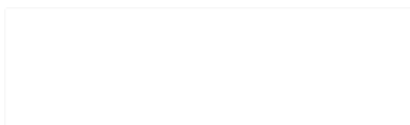
KRB displays the following message: "You have chosen the option to delete this attachment. This will permanently remove this attachment from the system. Click OK to confirm that you want to do this. Click Cancel if you do not wish to delete the attachment."

Click OK to confirm the deletion of the attachment. The Attachment delete confirmation page pops up. Otherwise, click Cancel to return to the Attachments for <req ID> page without deleting the attachment.

eLinking a Req with Attachment(s)

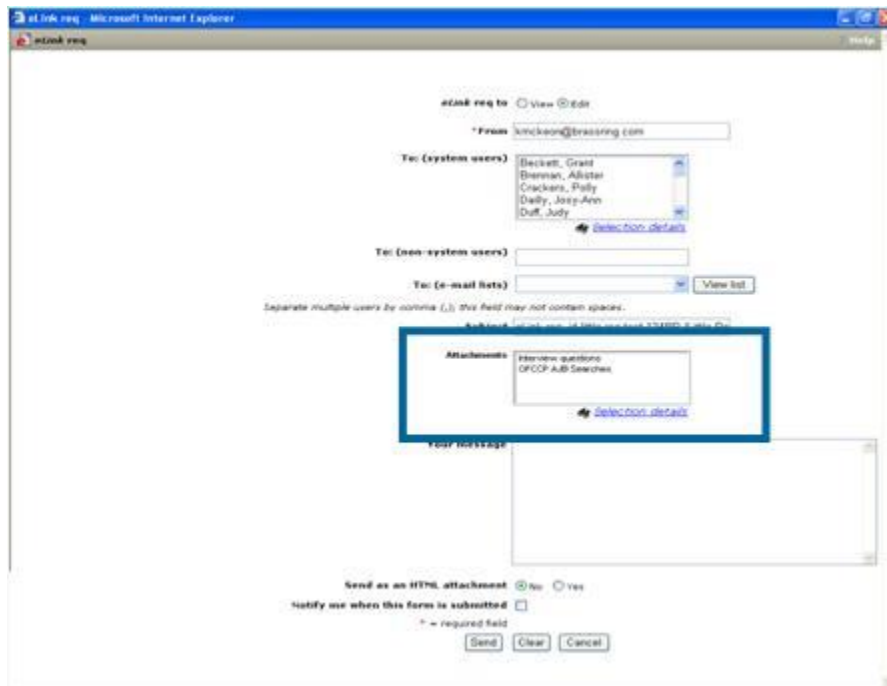
Users with the user type privilege All reqs – attachments view OR My reqs – attachments view turned on can eLink a req with associated attachments.

If a user with one or both of the "view" privileges clicks View while attempting to eLink a req that has associated attachments, the Req eLink page pops up.



Users can select one or more attachments from a list of attachments in the Attachments field. Users see only attachments in the language of the req which they are eLinking.

eLink req Window with Attachments Enabled



Req eLink Recipients

Recipients of eLinked req with attachments can have:

- The attachments view privilege turned off
- The attachments view privilege turned on and the attachments add privilege turned off
- The attachments view privilege turned on and the attachments add privilege turned on

Recipients of eLinked reqs with attachments must be both a member of the Req team and have the “My reqs – attachments view” privilege turned on; or he or she must have the “All reqs – attachments view” privilege turned on.

Reqs Privileges Matrix

For the eLink recipient...	He or she must have the privilege:	Req Team Membership
To view all reqs	All reqs – attachments view	n/a
To add to all reqs	All reqs – attachments add	n/a
To delete all reqs	All reqs – attachments delete	n/a

To view attachments to “my reqs”	My reqs – attachments view	✓
To add attachments to “my reqs”	My reqs – attachments add	✓
To delete attachments from “my reqs”	My reqs – attachments delete	✓

What eLink Recipients See Under Different Conditions

If the recipient is not a member of the req team and does not have the “My reqs – attachments view” privilege turned on, the Attachments tab does not display for that recipient.

If the recipient is a member of the req team but does not have the “My reqs – attachments view” privilege turned on, the Attachments tab does not display for that recipient.

If the recipient has the “All reqs – attachments add” privilege turned on and attachments are included with the eLink, he or she will see the Attachments tab with the hyperlinked attachment(s) on it. If no attachment(s) are included, the empty Attachments tab and the Add Attachments button displays along with the following message: “No attachments have been included for this eLink.”

If the recipient has the “My reqs – attachments view” privilege turned on; is a member of the req team for the req; and attachments are included with the eLink, he or she will see the Attachments tab with the hyperlinked attachments on it.

If the recipient has the “My reqs – attachments add” privilege turned on and is a member of the req team for the req, he or she will be able to add an attachment. If no attachment(s) are included, the empty Attachments tab and the Add button displays along with the following message: “No attachments have been included for this eLink.”

Example: Req Attachments Tab with Add and View Buttons

Open req: 136BR - PMtestjob123 : PMtestjob

Fronterra
BrassRing eLink

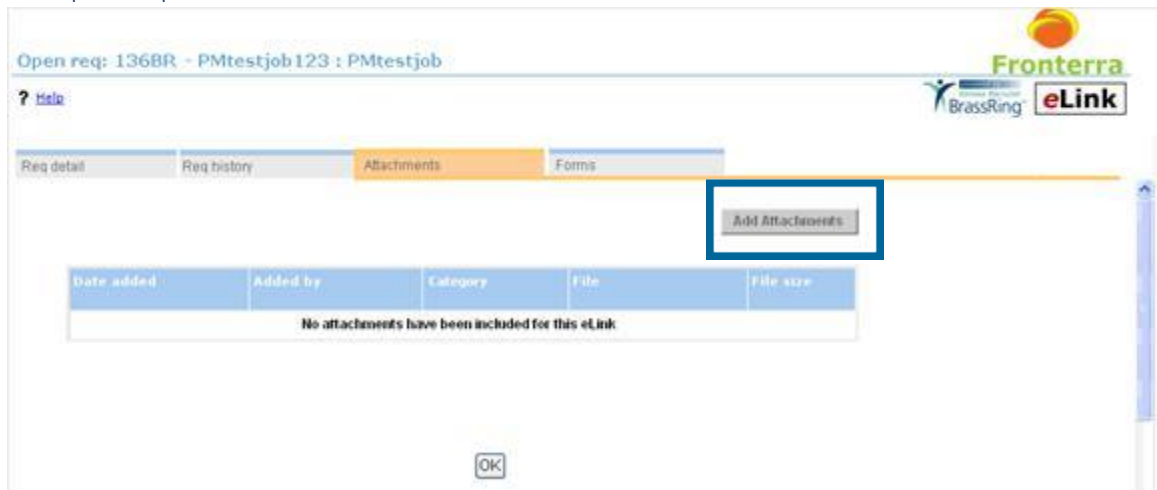
Req detail Req history Attachments Forms

Add Attachments View Attachments

Date added	Added by	Category	File	File size
25-Oct-2004 19:10:20	Jarvis, Harvey	OFCCP searches	A3E Searches	30K
00-Dec-2006 13:23:00	McKiernan, Kelly	Interview questions	Round1_Template.doc	29K

OK

Example: Req Attachments Tab with Add Button but No Attachment



Recruiter Experience - Req Specific Resumes Retain Their Connection to Reqs

With Release 11, when candidates submit their resumes against specific requisitions, the system maintains the connection between the submitted resume and the req. KRB users can forward the req-specific submission via eLink and be sure that the recipient is viewing the intended resume for that position.

KRB users can also view the req-specific submission by looking at the candidate's Talent Record from within the req folder: The resume/PDF corresponding to the specific req submission is displayed by default.

When eLinking and/or e-mailing the candidate's Talent Record from within the Req folder, the resume/PDF corresponding to the specific req submission is sent by default.

When viewing the candidate's Talent Record through an eLink or e-mail, recipients of eLinked and e-mailed Talent Records see the req-specific resume/PDF immediately.

How Resume Submissions are Stored in the System

This section describes how the system stores multiple submissions of resumes. See page 71 for the KRB user's point of view.

With Release 11, when a KRB user views a req folder, he or she can also see the resume/PDF submitted specifically for that req even if the submission is not one of the ten most recent submissions. KRB retains the original connection between the req and the resume submitted by the candidate against that req. Accordingly, the System stores more resumes than can be viewed on the Talent Record.

For example, assume that candidate John Doe has submitted fifteen (15) resumes. Each submission corresponds to a different requisition:

- Submission #1 is for req 123BR (it is "req-specific").
- Submission #2 is not for a specific req (it is "jobless"). The recruiter manually files the candidate to req 456BR.
- Submission #15 is for req 890BR (it is req-specific and it is more recent than the other two submissions)

KRB users cannot access Submission #1 from within the Talent Record because it is not among the last ten (10) submissions for the candidate. However, KRB users can access the resume/PDF associated with Submission #1 from within req 123BR.

KRB users can access Submission #15 from within the Talent Record because it is among the last ten (10) submissions; in fact, it is the most recent submission. KRB users see the resume/PDF submitted for 890BR when he or she views John Doe's Talent Record from within req 890BR.

If the system does not find a req-specific submission, it displays the resume/PDF associated with the candidate's most recent submission.

For example, John Doe's Submission #2 is not associated to a specific requisition. The recruiter subsequently filed the candidate manually into req 456BR. When KRB users view John Doe's Talent from within req 456BR, they see the resume/PDF submitted for Submission #15 (the most recent submission), because the candidate did not submit a resume specifically against req 456BR. Note: This is the behavior for all no-req folders.

Benefits

This enhancement increases usability and accuracy by tying resume submissions to corresponding requisitions. For example, KRB users can send eLinks of the same candidate to two hiring managers at the same time, but for two different requisitions. Each manager will see the resume associated with his or her specific requisition.

Costs

There are no additional costs associated with this feature.

Availability

Release 11

Visible Changes

There are visible changes associated with this feature.

Limitations and Known Interactions

None

Best Practice Recommendations

None

Overview of Implementation

This feature is automatically available to KRB users with the appropriate user privileges.

KRB User Experience

This section describes the experience of the user when working with current, duplicate, and req-specific resumes within KRB.

How Resumes are Listed on the Talent Record's Resume/CV Tab

There is no change in how KRB handles duplicate resumes when KRB users view Talent Records from within the Inbox, Working folder, My candidates, or Search Results, they see the most recent resume/PDF when the Talent Record is launched.

The most recent resume submitted through a Talent Gateway is listed as “Current.” Previously submitted resumes are listed in reverse chronological order as “Duplicate #1,” “Duplicate #2,” and so forth up to “Duplicate #10”:

- Current
- Duplicate #1
- Duplicate #2
- Duplicate #3
- Duplicate #4
- Duplicate #5
- Duplicate #6
- Duplicate #7
- Duplicate #8
- Duplicate #9
- Duplicate #10

ELinking Talent Records

When users eLink or forward a Talent Record through e-mail from within Search Results, Working folders, Inbox, or My candidates, the most recent resume/PDF is sent unless the user explicitly selects a different duplicate to send.

Viewing Resumes from within a Req Folder

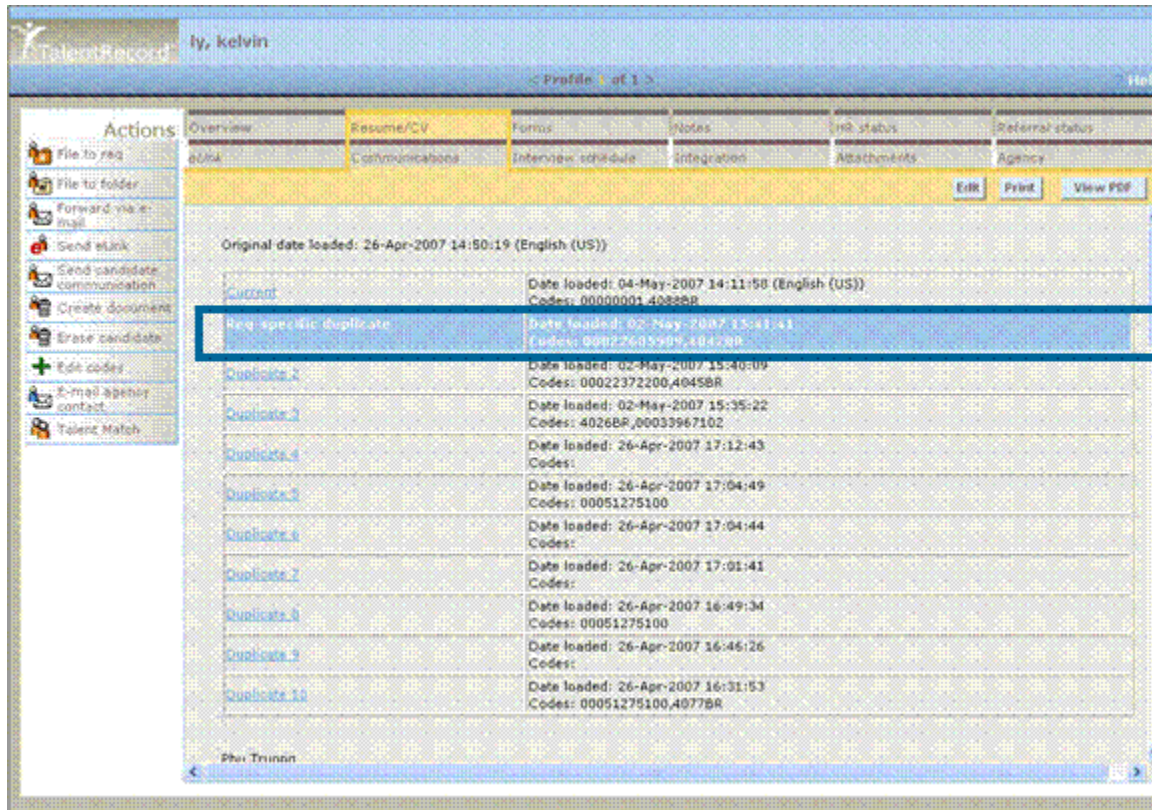
KRB users can encounter two scenarios when viewing the Talent Record from within a req folder. In the first case, the candidate did not make a req-specific submission to the job with which the req is associated, but was filed manually to the req by a recruiter, hiring manager, or other KRB user.

When KRB users view the candidate’s Talent Record from within a req folder under these circumstances, they see the “Working folder” view of the Resume/CV tab. See the previous section for more information about how duplicate resumes display within working folders.

In the second case, the candidate did make a req-specific submission to a job req. Users viewing the Talent Record from within the req folder see the req-specific duplicate displayed as the default resume.

If the req-specific duplicate is among the (ten) 10 most recent submissions for a candidate, the req-specific duplicate link is listed along with the other duplicates (Current, Req-specific duplicate, Duplicate #2, Duplicate #3, and so forth).

Req-specific duplicate stored on Resume/CV tab



Submitted resumes are listed as follows:

- Current: The resume submitted most recently.
- Duplicate #n: Duplicate #1 ... Duplicate #10
- Req-specific duplicate: If there is a req-specific duplicate for this req, it is counted as one of the duplicates. If the req-specific duplicate is the resume submitted most recently, it is listed as a “Req-specific duplicate” in place of “Current”.

Note: If a candidate makes multiple submissions for the same requisition, the Talent Record displays, by default, the most recent resume submitted for that requisition.

ELinking or Forwarding Talent Records from a Req Folder

When the KRB user eLinks or forwards via e-mail the Talent Record of a candidate who submitted a resume from within a specific req folder, the eLinked or forwarded resume/PDF is the one submitted against the requisition.

Recruiter Experience - Req Subsidiary Forms

Req subsidiary forms are configurable forms designed to capture additional information related to requisitions. The functionality in these forms is similar to that of candidate forms but forms of this type are attached to a requisition and not a candidate. The configuration procedure for Req sub forms is almost identical to the configuration procedure for candidate forms.

Benefits

KRB users can include and store additional information (such as sourcing strategy, structure of the interview team, and so forth) with the req that does not fit on the actual req form.

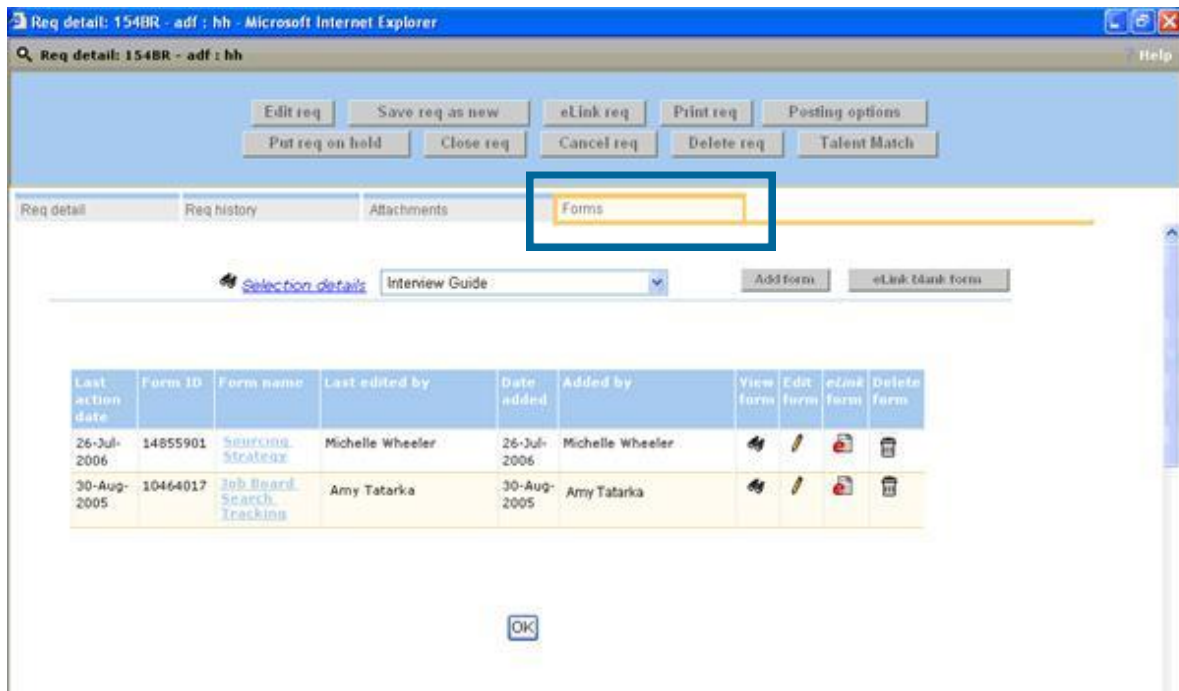
Visible Changes

There are no visible changes for Req subsidiary forms in KRB without configuration. After configuration, KRB users with the requisite user privileges see a `Forms` tab on each requisition.

- The Req sub form functionality is controlled by the Workbench client setting: Req subsidiary forms. When set to “No” (the default setting):
 - The `Forms` tab does not display on the req form in KRB.
 - The associated user type privileges for All Reqs and My reqs are not available for setting and are “grayed” out.

When set to Yes:

- The `Forms` tab displays on the req in KRB for users with applicable user type privileges.
- The associated user privileges for All Reqs and My reqs are enabled.
- If the associated user privileges for All Reqs and My reqs are configured for at least one user type, the “No” is disabled for this setting. An associated Tool tip says: “Setting cannot be set to NO if at least one user has the associated privilege.”
- The Workbench Client setting view page displays the new Req subsidiary forms settings along with whichever option is set for the client: No (the default) or Yes.



Limitations and Known Interactions

Users cannot attach Req sub forms to Talent Gateways, Gateway Questionnaires, or Agency Managers.

Cost

There are no additional costs associated with this feature.

Availability

This feature is available in R11, Build 6 internally. It is available in R11 externally.

Overview of Implementation

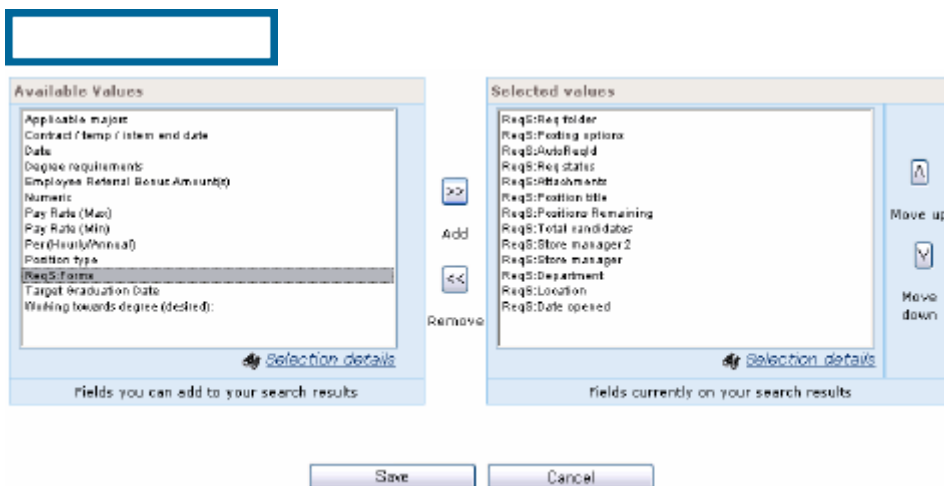
Kenexa must turn on the new client setting, Req subsidiary forms, in Workbench.

Kenexa creates Req subsidiary forms for attachment to requisitions. This includes defining the attributes of the form, and adding and defining attributes and options (where applicable) for fields contained on the form. Certified Workbench Users can administer forms once they are created. The forms are available for KRB users with appropriate privileges to attach to requisitions.

The major steps are:

1. Kenexa Personnel: Enables the client setting Req subsidiary forms in Workbench.

2. Kenexa Personnel: Configures for the client the attributes of the req subsidiary forms that will be used.
3. Kenexa or a Certified Workbench Users: Configure user type privileges for KRB users who will be using req subsidiary forms.
4. Kenexa or a Certified Workbench Users: Administers req subsidiary forms as needed once they are created.
5. KRB Users: Users with the appropriate user type privileges are able to see the Forms tab on requisitions and can work with req subsidiary attachments.
6. Kenexa Recruiter BrassRing users: Edit output fields to include the Forms column on req output grids:
 - a) Navigate to a requisition output grid (for example, select Reqs > View all reqs > Open).
 - b) Click the Edit output fields button.
 - c) The Edit output fields window opens.



Because you have gone through the previous enablement steps for Req subsidiary forms, the field ReqS:Forms is now available for selection in the Available Values list.

- d) Select it and click Add >> to move it to the Selected values list.

Use the up and down arrow keys to position ReqS:Forms in the Selected values list. The first value in the list corresponds to the first column on the req output grid.

- e) Click Save when you are finished.

In Kenexa Recruiter BrassRing, the Forms column is included as a column on the req output grid in the position that you selected for it.

KRB users with the appropriate user privileges can attach the form to one or more requisitions. See page 138 for more information.

Requisition Output Grids

The requisition output grid on all pages that list reqs contains a new Forms column for Req subsidiary forms.

Req Output Grid with Forms Column

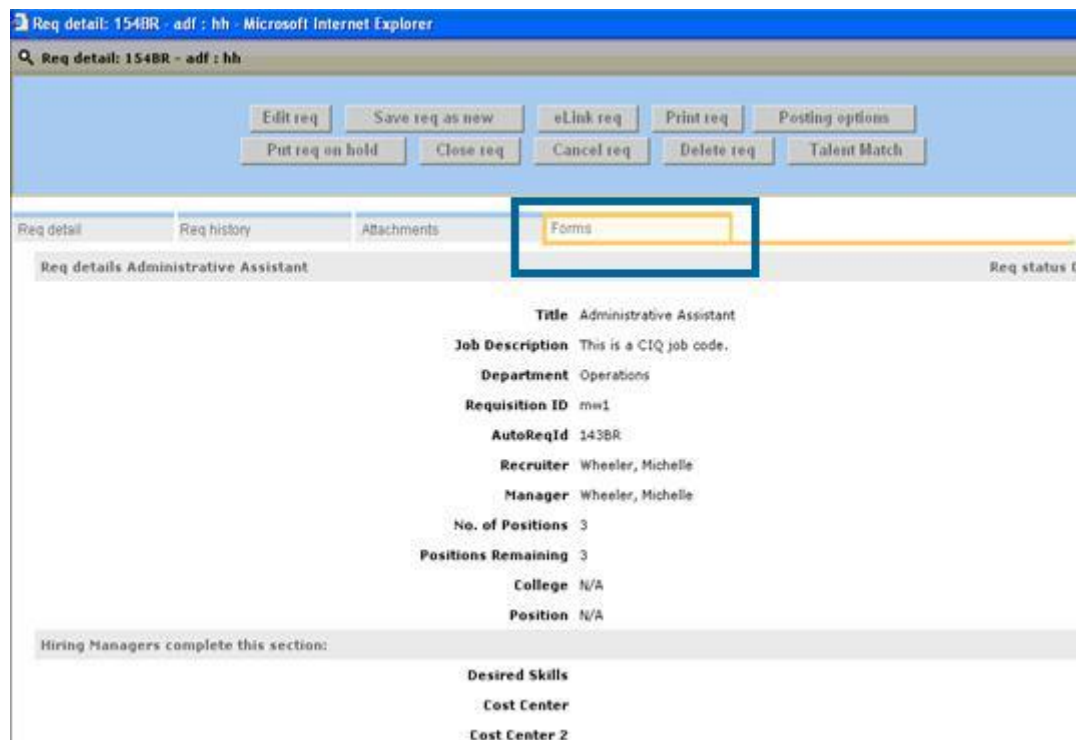
Select all	Req folder	Posting options	AutoReqId	Position title	Attachments	Forms	Positions remaining	Total candidates
<input type="checkbox"/>			157BR	Josy-Ann Test				2
<input type="checkbox"/>			186BR	asdf				0
<input type="checkbox"/>			13HS	TestTitle				0
<input type="checkbox"/>			27HS	test				0
<input type="checkbox"/>			180HS	AutoClose				0
<input type="checkbox"/>			179HS	test of countdown				0

If you have the All reqs – req sub forms view and/or My reqs – req sub forms view privileges turned on, you can see the Forms column on req output grids.

- Click the Forms icon for a req listed in the output grid to view the Forms page for this particular req. **Note:** The Forms icon displays only if forms have been attached to the req.
- Click the Add icon for a req listed in the output grid to add a form to the req.

Req Content and Attachments on Multiple Tabs

KRB Req Details Forms Tab with View Forms Privilege Turned On



KRB Req Form Tab

KRB users with appropriate privileges can see a new tab on the req form when they are viewing a req. The tab is not visible when users are adding or editing a req.

To see the Forms tab:

- The client setting Req Subsidiary Forms must be enabled in Workbench.
- If you have the My reqs – view forms user privilege turned on, you can see the Forms tab when you view a req whose team you are a member of.
- If you have the All reqs – view forms user privilege turned on, you can see the Forms tab for all reqs that you view.

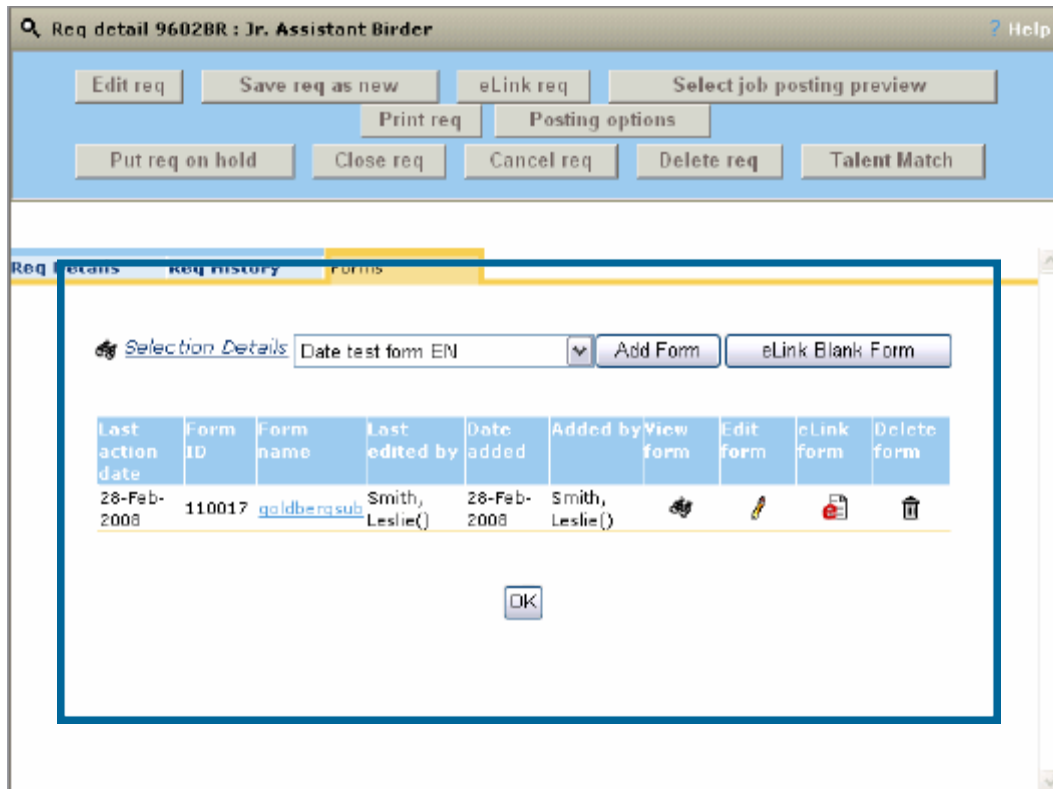
If you do not have one of the “reqs - view forms” privileges turned on, you cannot see the Forms tab when viewing the requisition.

The Req form content displays in the user’s locale.

To see the Forms tab on a requisition:

1. Navigate to the Req details page for the specific requisition you want to work with.
2. Click the Forms tab. On it you can:

- Work with a specific form by selecting it from the dropdown list (once there are req sub forms associated with the requisition). Req sub forms are listed in alphabetical order.
- Add a form (requires My reqs – add req sub form OR All reqs – add req sub form user type privileges)
- eLink a blank form (requires My reqs – add req sub form OR All reqs – add req sub form user type privileges).
- See the list of forms already associated with this requisition on the output grid.



Forms Tab Output Grid

Column	Description
Last action date	The last date the form was edited. The date displays as <dd-mmm-yyyy>. For Japanese locale users the dates displays as yyyy-mmm-dd.
Form ID	System generated unique ID for the form.
Form Name	Name of form, hyper linked. Click on the form link to view the attached form in view mode .
Last edited by	The last user to edit the form in the format <Last name, First name>. For Japanese locale users the name displays as <last name first name> with no comma. The name might include the “same name” differentiator [Last, first (emp ID or phone #)].
Date Added	The date the form was added to the req in the format<dd-mmm-yyyy>. For Japanese locale users the dates displays as yyyy-mmm-dd.

Added by	The user who added the form to the req. The user name displays as <Last name, First name>. For Japanese locale users the name displays as <last name first name> with no comma. The name might include the “same name” differentiator [Last, first (emp ID or phone #)].
View Form	Opens the form in a separate window for viewing only.
Edit Form	Opens the form in a separate window for editing.
eLink Form	Opens the eLink page in a separate window.
Delete Form	Opens the Delete form page in a separate window.

Viewing Req Sub Forms

To view a form that is attached to a req, click the View form icon or click on the hyperlinked form name. The form opens in a separate window and displays data in the user’s locale. If the form is not available in the user’s locale, it opens in the client’s base language. You cannot edit the form.

Note: For Japanese locale users the date displays as yyyy-mmm-dd. The user name displays as<Last Name First Name> with no comma.

View a form attached to a specific Req ID



Adding Forms

This procedure assumes that the client setting, Req subsidiary forms, is enabled and you have the appropriate user privileges turned on.

To add a req sub form to the req:

1. Select the form from the dropdown list.
2. Click the Add forms button.

3. The form opens for that specific req ID in a separate window in the language of your locale. You can complete the form in any purchased language.

Adding a form to a specific requisition




For reqs that have multiple languages associated with them, KRB displays the following message: “This form can only be saved in one language at a time. First select the appropriate language from the options below and then complete and save the form.”

4. You can eLink a blank form of this type from this window.
5. Click **Save** to save your changes and display the confirmation page. Otherwise, click **Clear** to clear the data from all fields and start again. Click **Cancel** to close the window without making any changes.
6. Repeat the “add form” process as necessary for each purchased language.


Editing Forms

To edit a form, you must have the “My reqs – edit req sub forms” user privilege turned on and be a member of the req team to which the req belongs, or you must have the “All reqs – edit req sub forms” user privilege turned on.

If you do not have one of the “reqs - edit forms” privileges turned on, you cannot see the Edit forms  icon when viewing the req.




To edit a form in Kenexa Recruiter BrassRing:


1. Click the Edit forms icon  to edit a Req sub form that is attached to a req. The Forms for <req ID> page opens.

2. Make the desired changes.
3. Click **Save** when you are finished. Otherwise, click **Clear** to clear the data from all fields and start again or click **Cancel** to close the window without saving any changes.

Deleting Forms

 To delete a form, you must meet one of the following criteria:

- have the “My reqs – delete req sub forms” user privilege turned on and be a member of the req team to which the req belongs.
- have the “All reqs – delete req sub forms” user privilege turned on.

If you do not have one of the “reqs - delete req sub forms” privileges turned on, you cannot see the **Delete forms** icon  when viewing the req.

eLinking Req Sub Forms

You can eLink Req sub forms by selecting the eLink icon on the Forms tab. This opens the eLink Req sub form window for a specific Req ID entitled in the following format: eLink <form name> - <ReqID>; for example, eLink Sourcing Strategy – 153BR, as shown in the screen capture below.

Recipient “view” privileges: The recipient of the eLink must have one of the “req - view req sub forms” user privileges turned on to view forms via elink.

Recipient “edit” privileges: The recipient must have one of the “req - edit req sub forms” user privileges turned on to edit forms via elink.

The eLink recipient views forms in the language of his or her locale if the translation is available. If the recipient’s locale language is not available, the form is displayed in your organization’s base language.

eLink a Req sub form attached to a specific requisition

eLink Sourcing Strategy - 152BR -- Microsoft Internet Explorer

eLink Sourcing Strategy - 153BR

eLink form to View Edit

*From amy.tatarka@kenexa.com

To: (system users)

Hiring,Manager
Manager,Entry-level
McKiernan,Kelly
one,test
Pysell,Jason

[Selection details](#)

To: (non-system users)

Separate multiple users by comma (,); this field may not contain spaces.

Subject Please edit the following form: Inte

Send as HTML attachment No Yes

Notify me when these forms have been submitted.

Your message

* = required field

Send Clear Cancel

Receiving and Editing the eLinked Form

A KRB user with appropriate privileges can receive a request to edit an eLinked req sub form.

Recipient user privileges: The recipient must have one of the “req - edit req sub forms” user privileges turned on to edit forms via eLink. If a “req – edit req sub forms” user privilege is turned on, the corresponding “req - view req sub forms” user privilege is turned on automatically.

The eLink recipient views forms in the language of his or her locale if the translation is available. If the recipient’s locale language is not available, the form is displayed in your organization’s base language.

The e-mail message in which the eLinked req sub form is embedded says, “Please edit the following form: <Form name, Req ID>.”

To edit the req sub form:

1. Click the eLink to open the eLink window.
2. Edit the fields for the eLinked form.
3. Click **Save** to save your changes. The confirmation message displays. Otherwise: Click **Clear** to remove the data from all form fields, or click **Cancel** to close the window without saving any changes.
4. Once the recipient completes and saves the form via eLink, KRB records the date and user.

eLinked Req Sub Form, Recipient's View

Sourcing Strategy - 152BR - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites SnagIt

Links BrassRing Intranet Onyx KenexaNet Workbench QA Workbench

Address https://staging.brassring.com/NetStream/500/Presentation/Template/ASP/Candidate/Forms/ViewF Go

Sourcing Strategy - 152BR **Fronterra**

? [Help](#)

Req ID

Hiring Manager

Recruiter

Campus Visit

* = required field

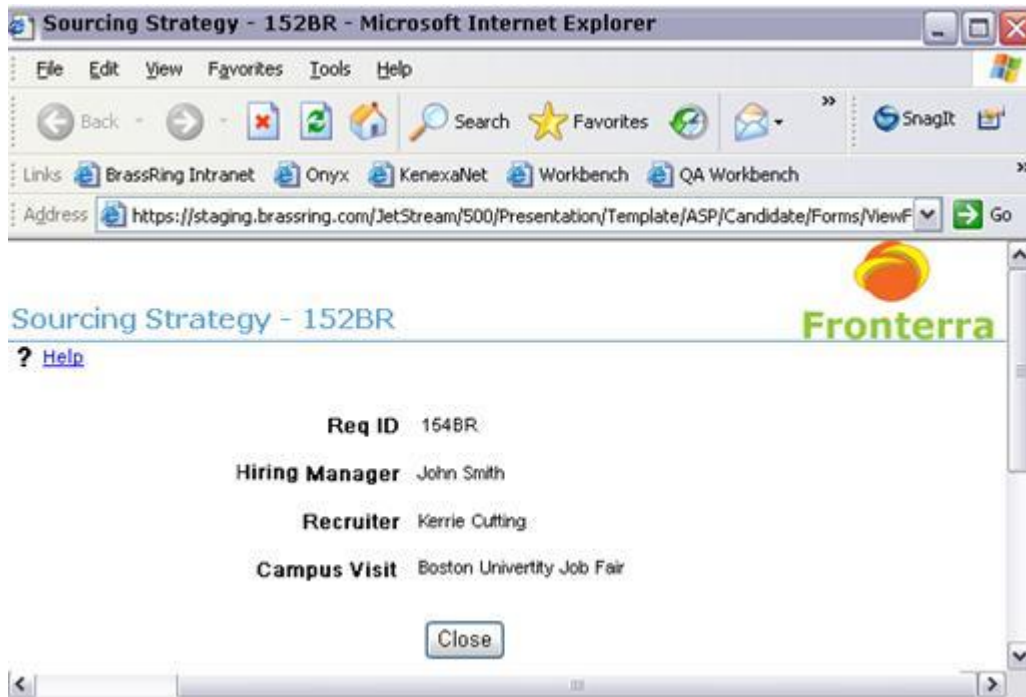
Viewing the eLinked Form

The recipient being asked to review the eLinked form receives an e-mail with the following subject line: “Please review the following form: <Req sub form name> - <reqID>.” (For example, “Please review the following form: Sourcing Strategy – 152BR.”)

To view the req sub form:

1. Click the eLink to open the eLink window.
2. View the Req sub form.
3. Click **Close** to save your changes. The confirmation message displays.

View an eLinked Req Sub Form



Attaching Forms to a Req and eLinking

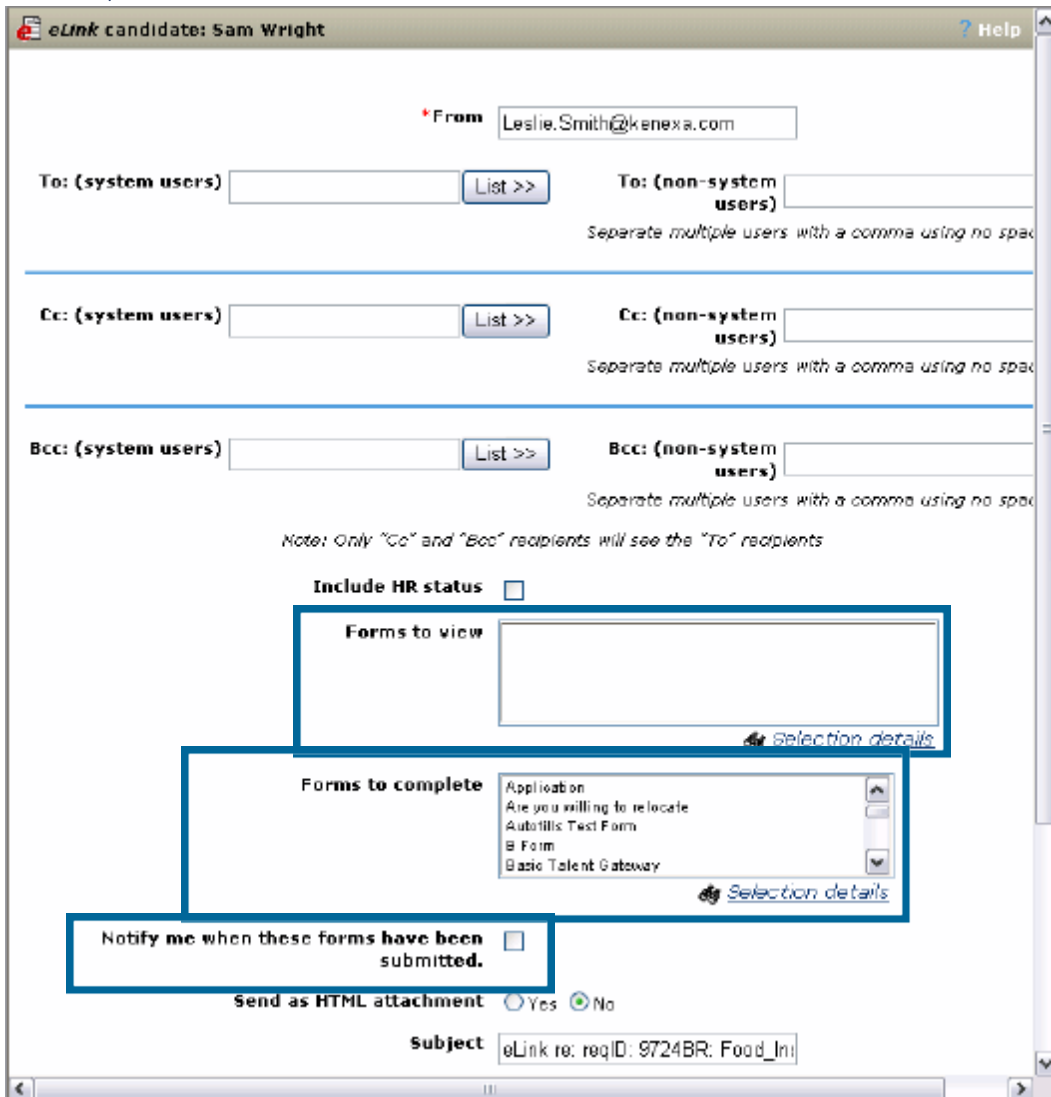
You can now attach req sub forms to a req prior to sending it via eLink. The eLink req window has new fields:

Forms to view

Forms to complete

Notify me when these forms have been submitted

eLink req with new "Forms" fields



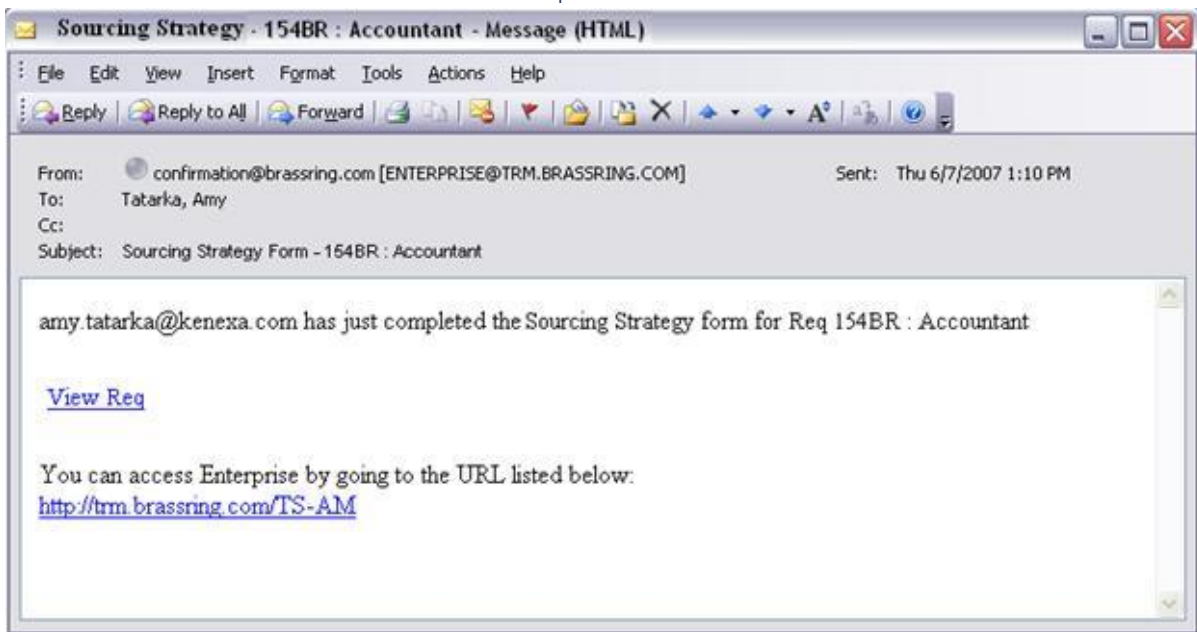
See the table below for more information about these fields.

Elink Req with Form – New Fields Details

Forms to view	<p>Select one or more forms from the list to attach for viewing when you are eLinking a req.</p> <p>User privileges: The eLink recipient must have one of these user privileges turned on to see the Forms to view section on the Req elink page below the Subject field or Attachment field (if Attachments are turned on) and above the Message field:</p> <p>All reqs – req sub forms view</p> <p>My reqs – req sub forms view</p>
---------------	---

Forms to complete	<p>Select one or more forms from the list to attach for completion by the recipient when you are eLinking a req.</p> <p>User privileges: The eLink recipient must have one of these user privileges turned on to see the Forms to complete section on the Req elink page below the Subject field or Attachment field (if Attachments are turned on) and above the Message field:</p> <p>All reqs – req sub forms view</p> <p>My reqs – req sub forms view</p>
Notify me when these form(s) have been submitted	<p>Check this box to have an e-mail notification sent to you when the forms are completed by the eLink recipient. By default, the check box is not selected.</p>

E-mail notification to sender when form is completed



Receiving eLinked Req with Forms

When you click the eLink in your e-mail message to open a req with attached forms, a message at above the Req detail tab informs you that you have a number of forms to complete.

eLinked Req with Forms Attached

Open req: 136BR - PMtestjob123 : PMtestjob

[Help](#)

You have one form to complete

Req details Administrative Assistant Req status Open

Title Administrative Assistant
Job Description This is a CIQ job code.
Department Operations
Requisition ID mw1
AutoReqId 143BR
Recruiter Wheeler, Michelle
Manager Wheeler, Michelle
No. of Positions 3
Positions Remaining 3
College N/A
Position N/A

Click the Forms tab to see forms to view and/or forms to complete.

eLinked Req with forms, Forms tab – Before viewing or completing forms

Open req: 136BR - PMtestjob123 : PMtestjob

[? Help](#)

You have one form to complete

Req detail Req history Forms

Forms to view

Last action date	Form	Last edited by	Date added	Added by
24-May-2007	Sourcing Strategy	Amy Tatarka	24-May-2007	Amy Tatarka

Forms to complete

Last action date	Form	Last edited by	Date added	Added by	Form completed
	Job Board Search Tracking				

Columns for Forms to view and Forms to complete

Column	Description
--------	-------------

Last action date	Note: The format for the date is dd-mmm-yyyy except for Japanese locale users. For Japanese locale users, the date is displayed in the format yyyy-mmm-dd.
Form	Click the hyperlink to view the form.
Last edited by	The name of the user who last edited the form in the format Firstname Lastname. Note: For Japanese locale users the recipient's name is displayed in the format Lastname Firstname with no comma. [Note: If no one has edited the form, this field displays the name of the form creator.
Date added	The date the form was added in the format dd-mmm-yyyy. For Japanese locale users, the date displays as yyyy-mmm-dd.
Added by	The name of the user who added the form to the req eLink in the format Firstname Lastname. Note: For Japanese locale users the recipient's name is displayed in the format Lastname Firstname with no comma.
Form completed (Forms to complete only)	Before completing the form: The column is empty. After completing the form: The column displays a red check mark.

Open req: 136BR - PMtestjob123 : PMtestjob

Fronterra
BrassRing eLink

? Help
You have one form to complete

Req detail Req history **Forms**

Forms to view

Last action date	Form	Last edited by	Date added	Added by
24-May-2007	Sourcing Strategy	Amy Tatarka	24-May-2007	Amy Tatarka

Forms to complete

Last action date	Form	Last edited by	Date added	Added by	Form completed
07-Jun-2007	Job Board Search Tracking	Amy Tatarka	07-Jun-2007	Amy Tatarka	<input checked="" type="checkbox"/>

eLinked Req with Forms tab after viewing or completing forms

Reporting - Associating Codes to Specific Submissions

With Release 11, when adding codes to a candidate's Talent Record, users can select the resume submission to which a code should be associated.

The Add Source Code <# selected candidates> window has been updated:

- The instruction at the top of the page has been updated.
- Candidate names appear next to a select list containing the last 10 submissions for that candidate along with the submission date and any codes already associated with that submission.
- The "Current" resume is selected by default
- In req folders, the req-specific submission, if available, is selected by default.
- When the user clicks Save, the new codes are associated with the selected candidate submission.

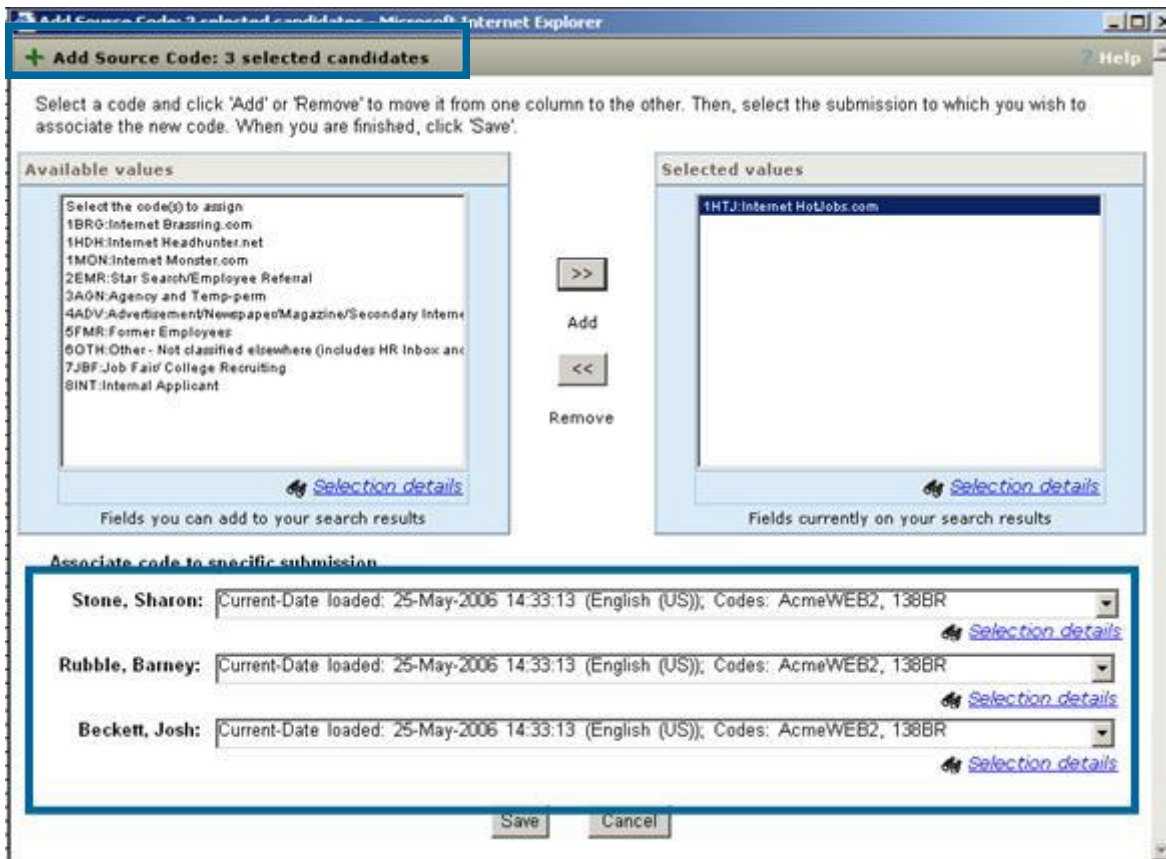
Attaching Source Codes Manually to Candidates

In KRB, you can manually attach a code to an individual candidate submission from several task sequences in the system.

You can add codes for multiple candidates in a single action. Select up to twenty-five (25) candidates from the list. If you add more than 25 codes and click OK, an error message displays.

To attach a source code to one or more specific candidate(s):

1. Access the AddSource Code page from one of several task sequences:
 - From the candidate's Talent Record. Click Edit codes > Add codes.
 - After searching, within your search results, click Add codes in the Actions menu and click the Add codes button OR click the Last codes hyperlink for a candidate and the Add codes button.
 - Within a req, working or inbox folder: Click Add codes in the Actions menu and click the Add codes button OR click the Last codes hyperlink for a candidate and the Add codes button.



2. Select the appropriate code from the Available values list and click the Add button >> to move it to the Selected values list. (If you want to remove a code from the Selected values list, click the Remove button <<.)
3. Select a specific candidate submission from the single-select list (next to the candidate name) under the Associate code to specific submission heading.
4. Click Save.

Add Source Codes Window

Field	Description
Associate code to specific submission	Select the specific submission to which you want to attach the selected code(s).
[New in R11]	<p>Candidate names are listed in the format “Last, First”. In each select list, the name of the “submission” appears followed by the date loaded and any codes already associated with that submission.</p> <p>This information is included for all submissions currently visible within the candidate's talent record.</p> <p>This section follows the rules for displaying candidate submissions, both new and duplicate. See page Error! Bookmark not defined. for more information about how duplicate resumes, including req-specific duplicates, are displayed on the Talent Record from within</p>

req folders. If a candidate submission is no longer visible in the Talent Record in general, it is not available for selection in this field.

The format for submissions is:

<Submission name>-Date loaded: <date/time stamp> <submission language>; Codes: <code>,<code>

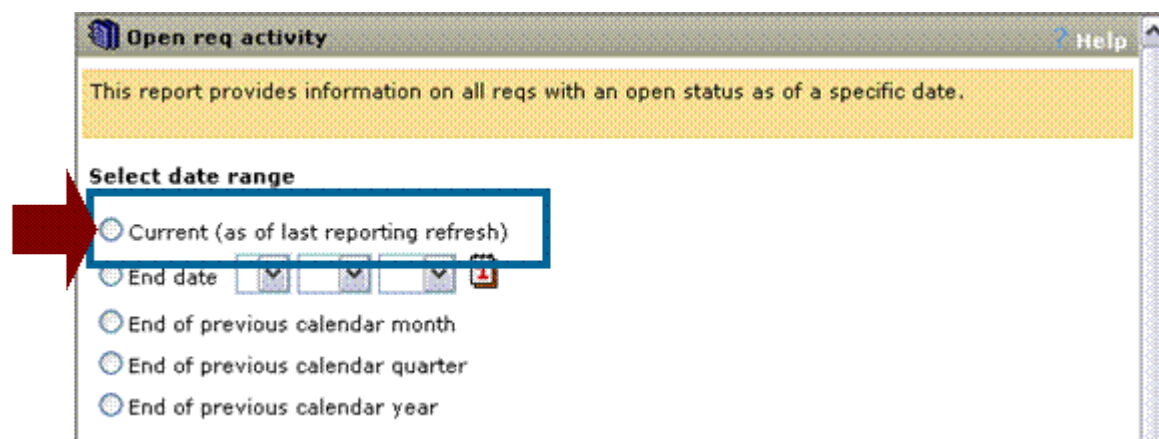
When you access the [Add source code](#) page from within a Talent Record, or from Search results, Working folders, or My Inbox folder, the submissions designated as “Current” in the list are always selected by default. If you do not select a different submission option in the list, the selected codes are attached to any submission labeled “Current” when you click [Save](#).

When accessing this page from with a req folder, the “Req-specific duplicate” submission is always selected by default within the list. If there is no specific submission for a particular req (i.e. the candidate never applied to a specific job but has been manually filed to the req), then the submission designated as “Current” is selected by default.

Reporting - Open Req Activity Report

The Open req activity standard report has a new date filter option of Current. To access the report, log into KRB and select Reports > Standard reports > Open req activity.

With Release 11, clients can set up report schedules for the Open req activity standard report to return a listing of currently open reqs. (“Current” in this context means as of the last refresh of the reporting server.)



Report Output

When users select Current as the date range filter and executes or schedules the report, the report returns data for all reqs in the Open status as of the last reporting server refresh, which takes on a rolling basis between 12 AM and 3 AM ET [GMT/UTC -5 hours]. In the report output the column “As of <current date>” is populated with Today's date in the report output. Note: The data returned also meet any additional filter criteria entered by the user.

Effect on Scheduled Reports

There is no effect on existing scheduled Open req activity reports. Once the Current option is available, users can create new report schedules to take advantage of the Current date option.

Benefits

Users no longer have to supply an end date to determine which open requisitions should be returned in the report. Clients can set up a recurring report schedule for this report to pull current req data because a user would have to change the End date filter each time the report was run.

Cost

There is no additional cost associated with this feature.

Availability

Release 11

Visible Changes

Users with privileges to access this report will see the change automatically in Release 11.

Limitations and Known Interactions

The Open req activity report does not provide real-time data on open requisitions.

Best Practice Recommendations

None

Overview of Implementation

This feature is available without configuration in Release 11.

Reporting - Req Activity Report Enhancements

With Release 11, Kenexa has revamped the Req activity standard report to make it more usable and informative. The report captures original posting date and actual removal date. It uses these dates to calculate the total number of days posted.

The report description on the Standard Reports menu has been updated to reflect changes to the report.

The new Req ID filter within the report works as follows:

- No reqs are selected by default.
- Users can select one or multiple reqs from a list of all the reqs to which they have access.
- User access is based on Org group and My reqs / All reqs user type privileges.

If the user has no access to reqs, the Req ID filter does not display on the report, the user cannot use the filter, and no data are returned for the filter.

- The ReqTrigger client setting determines how the data are derived and the label for the Req ID filter:

If the trigger is set to Auto or No, the field pulls the data and label from Auto req ID.

If the trigger is set to Optional, the field pulls the data and the label from Optional req ID.

- The filter works in conjunction with the Site name filter
- If selected req(s) are not posted to selected site(s), the report does not return any data.

Changes to Report Filters

The report has three (3) new filters:

- Date range
- Req ID (or your organization's label for it)
- Site name

Changes to Sorting/Grouping Options

The report has two new sorting/grouping options:

- Details by Gateway
- Details by requisition

The sorting/grouping option `Active jobs` was removed.

Changes to Report Output

We made the following changes to the report output:

- Added a date filter header.
- Renamed the `Total active` column to `Total active jobs (as of end date)`.
- Removed two columns from the Summary report output that were returning irrelevant data: `Total inactive` and `Total jobs`.
- Added three new output columns: `Original posting date`, `Actual removal date`, and `Total days posted (as of end date)`.
- Revised the output for the following formats and views:
 - Summary report PDF output
 - Gateway detail PDF output
 - Req detail PDF output
 - Excel sortable report output

Changes to the Scheduled Report Notification E-mail

To keep KRB users informed about report changes and the possible effect on report schedules, we updated the scheduled report notification e-mail.

Benefits

Kenexa Recruiter BrassRing captures the original posting date and the posting removal date, and KRB users can generate this information in the Req activity report.

The new report filters help clients target a specific time frame. Clients can accurately determine the length of time a position had been posted to a gateway, thereby averting a potential legal issue should a candidate file a claim that they were not given adequate opportunity to post for a position.

Kenexa removed filters that yielded irrelevant data, such as “Inactive jobs.”

Cost

There is no additional cost for this feature.

Availability

Release 11

Best Practices

The report logic is different for postings done before and after October 1, 2007. Please see the “Limitations and Known Interactions” section below for detailed information about how this affects report results.

Visible Changes

In Kenexa Recruiter BrassRing, the visible changes to the report are:

- Revised description of the report on the Standard Reports menu page
- Revised Req activity filter page – Date, Req ID, Site name
- Revised report output
 - Summary view – PDF output
 - Gateway detail – PDF output
 - Req detail – PDF output
 - Sheets 1, 2, and 3 - Excel sortable output
- Report results e-mail notification

Limitations and Known Interactions

Important! Report Behavior For Data Prior To October 1, 2007: The new data categories are available in the Req activity report at the end of September, 2007. The Req activity report does not capture the information represented by these categories for requisitions posted prior to October 1, 2007.

The data for the revised report are stored in a different database table. That means that if you posted and un-posted a req prior to October 1st, post the req again, and then run some reports, the reports will return data for only the newer record even if your selected date range covers the period of the earlier posting prior to the change to the report structure and report database.

Additionally, if you run the report for a date range spanning a time period which starts before October 1, 2007 and ends after October 1st, 2007, and within this date range a req was posted and un-posted prior to October 1, and then posted again, only the most recently posted req is returned in the results.

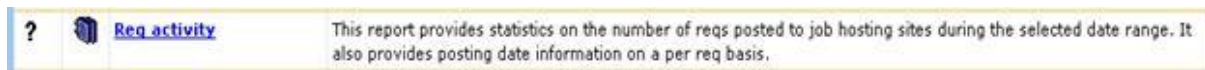
Overview of Implementation

This report is available from the Standard Reports menu page to users with the appropriate privileges.

Report Menu Description Update

The description in the Standard reports menu for the Req activity report has been updated to reflect the report's revised functionality. The new description is, "This report provides statistics on the number of reqs posted to job hosting sites during the selected date range. It also provides posting date information on a per req basis."

To access the reports menu, log in to KRB and select Reports > Standard reports. The Standard reports menu page displays in the browser window.



Req Activity Report Filters

The Req activity standard report has new and changed filters. To access the report:

1. In KRB, select Reports > Standard reports.
2. On the Standard reports menu page, scroll to the Talent Gateway section and click the Req activity report link.
3. The Req activity filter page opens.
4. See the table below this screen capture for information about each filter.

Req activity ?Help

This report provides statistics on the number of reqs posted to job hosting sites during the selected date range. It also provides posting date information on a per req basis.

Select date range

Current (as of last reporting refresh)
 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)

Refine your query by selecting from the filtering options below. If no additional selections are made, a data satisfying the date criteria will be returned.

For filters which support multiple selections, use the [CTRL] key to select multiple options.

Job Category

Site name

Select an output format

Req Activity Report Filters

Filter	Description
Select date range	<p>Select the date range to pull req-specific Talent Gateway posting data for a specific time period.</p> <ul style="list-style-type: none"> ■ Current (as of last reporting refresh) [New in R11] ■ 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)

Details and Limitations

Current returns posting data for the selected reqs and Talent Gateway sites as of the last reporting refresh.

If you select a date range greater than 181 days for the *Begin date / End date* option, you must select either a Req ID or Site name filter.

The purpose of this selection is to ensure that the report will not time out during generation.

Month to date returns data for the selected reqs posted to the selected sites from the 1st day of the current month through the current date. The report does not return data for the current day because reporting servers are refreshed only once per day.

If a req was posted for part of the date range included in the date range filter, it is returned in the report results with the appropriate posting dates even if it is no longer posted.

Previous calendar month returns data for all selected reqs posted to the selected sites for the month prior to the date on which the report is being executed.

Calendar quarter to date returns data for all selected reqs posted to the selected sites from the first day of the existing business 'quarter' to the present. (The data for the current day is not returned in the report because reporting servers are refreshed only once a day.)

Quarters are defined as:

Jan 1 - Mar 31

Apr 1 - June 30

July 1-Sep 30

Oct 1 - Dec 3

Previous quarter (for equivalent time period) returns data for all selected reqs posted to the selected sites for the equivalent time period within the previous quarter as the 'position' of the date on which the report was executed within the current quarter.

For example, if you execute the report on April 30th with this option selected, the report returns data for Jan. 1 to Jan. 30.

Previous quarter (all) returns data for all selected reqs posted to the selected sites for the entire quarter prior to the quarter in which the report is being executed.

Calendar year to date returns data for all selected reqs posted to the selected sites from Jan 1 of the current year to the present. The data for the current day is not included because reporting servers are refreshed only once per day.

Previous year (for equivalent time period) returns data for all selected reqs posted to the selected sites for the equivalent time period within the previous year as the “position” of the date on which the report is being executed in the current year. For example, if the report is executed on April 30th, selecting this option returns data for Jan 1 to April 30 of the previous year.

Previous year (all) returns data for all selected reqs posted to the selected sites for the entire year prior to the year in which the report is being executed.

If you select any of the date range filters Calendar year to date, Previous year (for equivalent time period), OR Previous year (all), you must make selections for the Req ID filter or the Site name filter.

[Date Range Filter Rules](#)

For all of the validations below, the Reports Module displays a pop-up error message when the user clicks Generate report now OR Schedule report. Click OK to close the window and return to the date range filter.

Enter a complete date range in the Begin date and End date fields if you are using this particular date range filter.

Do not enter a date range that includes a day later than the current day's date.

	<p>Enter an End date that is later than the Begin date.</p> <p>Do not enter invalid dates (for example, February 30).</p> <p>Do not enter a date range greater than 366 days in the Begin/End date filter.</p> <p>If you enter more than 181 days in the Begin/End date filter, you must also select Req ID filters or Site name filters.</p> <p>If you select any of the following date range filters, you must also select either a Req Id or a Site name: "Calendar year to date", "Previous year (for equivalent time period)", or "Previous year (all)" .</p>
<p>Req ID</p> <p>[New in R11]</p>	<p>This filter is not required to execute the report.</p> <p>Use this filter to pull posting activity for a specific req or reqs.</p> <p>This is a multi-select list. No reqs are selected by default.</p> <p>You can pull the source data for a specific req or a group of reqs.</p> <p>To select several items as a group, press down the CTRL key and select additional items in the list.</p> <p>You can see a list of specific requisitions [Req IDs or All req IDs] to which you have access (the default selection), according to your user privileges.</p> <p>[Note: The Client Setting Req Trigger determines how req IDs are assigned. If Req Trigger is set to Auto or No, the report displays the KRB AutoReqID. If Req Trigger is set to Optional, the report displays your organization's optional req ID for each requisition.]</p> <p>KRB displays your organization's custom label for the field in the locale of the locale language of the user accessing it. If the translated value is unavailable for the user's locale, the field name displays in the base locale.</p> <p>Org Group Security: You can see only the req IDs associated with the Org Group(s) to which you belong. Org Group membership controls which req templates you have access to.</p> <p>For example, assume that a user is associated with Org Group A and Org Group A has access only to Req Template A. When that user launches this page, he or she sees only the requisitions associated with Req Template A.</p>

	<p>Field Level Security: No security is applied. All users can see this filter.</p> <p>Candidate Type Security: No security is applied.</p> <p>My/All Reqs Security: You can see only the requisition IDs for which you have viewing privileges.</p> <p>If you have access to view My reqs – Open you can see the list of open requisitions for which you are the hiring manager, recruiter, or req team member.</p> <p>Note: This filter works in conjunction with the "Site name" filter. If a selection is made in the "Site name" filter in addition to a Req ID selection, and the selected req(s) have not been posted to that site(s) within the selected date range, then no results will be returned within the report.</p>
Site name	This filter is not required to execute the report.
New in R11	<p>Use this filter to run the report for a specific Gateway or set of Gateways. The list includes the following (all active): Global Talent Gateways, Full Talent Gateways, and Agencies.</p> <p>By default, no site names are selected.</p> <p>You can select one or more sites.</p> <p>The report returns posting data for the sites you select.</p> <p>Limitations:</p> <p>You must select either a single Req ID or a single Site name as a filter if you select one of the following date ranges:</p> <ul style="list-style-type: none"> ■ a date range greater than 181 days (> 181 days) for the Begin date and End date ■ Calendar year to date ■ Previous year (for equivalent time period) ■ Previous year (all)
Select an output format	<p>The output formats available are:</p> <ul style="list-style-type: none"> ■ Acrobat (.pdf) ■ Excel Sortable (.xls)

- Formatted Excel (.xls)
- Extensible markup (.xml)
- Image file (.tif)
- Office web (.mhtml)
- Tab delimited (.csv)

After selecting the filters and output format, click **Generate report now** to create a report immediately. The validation process for the report has been updated to include the new filters and their rules.

Click **Schedule report** to create a report schedule with your current selections. The validation process for the report has been updated to include the new filters and their rules.

Otherwise, click **Clear** to clear all your selections and start again if desired. Click **Cancel** to close the report filter window without generating or scheduling a report.

Report Output: Summary View, PDF

The Summary View of the Req activity report has been updated to reflect the new, removed, and changed filters.

New date range selection option: If the date range filter selection was **Current**, the report output displays **As of: <current date>**.

Columns removed: “Total inactive” and “Total jobs”

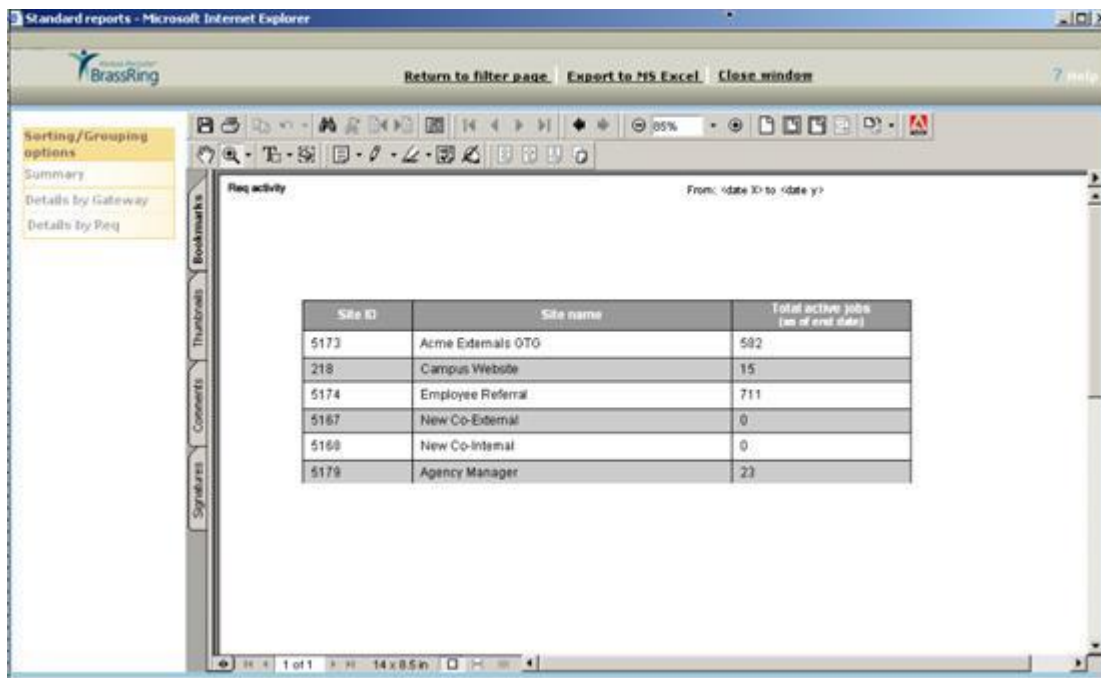
Column renamed: The **Total active** column has been renamed **Total active jobs (as of end date)**. This column returns data for the number of total distinct jobs posted to the gateway as of the end date for the selected date range.

Site ID: The unique ID for the site.

Site name: The name of the site to which req(s) are posted. If your organization uses one or more Global Talent Gateways (GTGs), this field lists them but does not list individual Talent Gateways (TGs). If your organization does not use GTGs, this field lists individual TGs. If the Site name filter was used, the Summary grid returns a count of all active jobs posted to the selected site/sites.

If the Req ID* filter was used, the Summary grid returns the count of all active jobs for all sites to which the selected req(s) are posted. This represents no change from previous functioning.

*In most cases, your organization has renamed the Req ID filter with a custom label.



Site ID	Site name	Total active jobs (as of end date)
5173	Acme Externals OTO	582
218	Campus Website	15
5174	Employee Referral	711
5167	New Co-External	0
5169	New Co-Internal	0
5179	Agency Manager	23

Report Output: Details by Gateway PDF

The Details by Gateway view displays Req activity for the selected date range for each Global Talent Gateway or Talent Gateway (if your organization does not use GTGs). Through this sorting/grouping option, the user can view specific posting activity grouped at an individual site level.

For each GTG or TG site, this report view lists the Req ID, the Original posting date, Last updated on, Planned removal date, Actual removal date, and Total days posted (as of end date) for all reqs that were active on the site in the selected time frame.

To see the Details by Gateway view:

1. Select the report filters on the Req activity report filter page.
2. Select the output format for the report (in this case Acrobat .pdf).
3. Click Generate report now.
4. The Sorting/Grouping options display in the report generation window as the report is generating. The report automatically generates in the Summary view by default.
5. Click the Details by Gateway link in the report generation window to refresh the report.
6. The report displays in the view for the selected sorting/grouping option.
7. You can open the report on the spot to view it immediately or save it to your hard drive for later use.

8. Once you have finished you can click links to return to the filter page, export to MS Excel, or close the window.

[New in R11] A new footnote has been added to report: “Please note: For reqs posted prior to 01-Oct-2007, Original posting date, Actual removal date, and Total days posted data are not available and therefore these columns will be blank within the report output.”



Column headers:

- Req ID
- Original posting date
- Last updated on
- Planned removal date
- Actual removal date

Report Output: Details by Gateway PDF

Reference Table: Report Output: Details by Gateway PDF

Field	Description
Date range	The report lists the date range for which the report results are valid in the report header.
New in R11	
Site name	The report lists the individual site name for each site for which data are returned in the report.
Under each Site name, a row is returned for each Req ID posted to the site within the specified date range. Each row contains the columns listed below.	
Req ID	<p>The unique ID of each req posted to the specific Gateway during the selected time frame.</p> <p>This column displays either the auto req ID or optional req ID based on the client's configuration.</p> <p>[Note: The Client Setting Req Trigger determines how the req IDs are assigned. If Req Trigger is set to Auto Or No, the report displays the KRB AutoReqID. If Req Trigger is set to Optional, the report displays your organization's optional req ID for each requisition.]</p> <p>The Req ID column label displays the client's custom label for either the AutoReqID or optional req ID in the language of the user's locale. If the translated value is unavailable for the user's locale, the label for the base locale is displayed.</p> <p>Each req that was posted to the listed Gateway, within the selected date range, is listed in this grid even if the req is no longer posted to the gateway as of the range's end date.</p>

	Reqs are sorted in ascending alphanumeric order under each site name.
Original posting date	The original posting date for a requisition to each specific site to which it was posted in the format dd-mmm-yyyy.
[New in R11]	<p>If the req was posted prior to October 1, 2007, this column will be blank for that req.</p> <p>This is a new column in the Req activity report. It is replacing the "Added on" column which appeared on the "Active jobs" view.</p> <p>Previously, when a req was posted to a Gateway, we captured the posting date but if that posting was updated for any reason, the original posting date was overwritten with the date the req was updated. As of October 2007, a back-end change has been made to capture and preserve the original posting date.</p> <p>This back-end change is being made visible in KRB through this report.</p>
Last updated on	The date that the posting was last updated for the selected site should be returned in the format dd-mmm-yyyy.
[Updated name in R11]	This column's name was changed to reflect that only the most recent update to the posting is listed in this column.
Planned removal date	The date that the posting was scheduled to be removed from the Gateway in the format dd-mmm-yyyy.
[Updated name in R11]	This column's name was changed to reflect that this is the planned removal date but not necessarily the actual removal date.
Actual removal date	The actual removal date for the requisition to each specific site to which it was posted in the date format "dd-mmm-yyyy."
[New in R11]	<p>The column is blank if the req has not yet been removed from the site.</p> <p>Note: This column is blank for any reqs returned in the report that were posted before October 1, 2007.</p>
Total days posted (as of end date)	The total number of days a requisition was posted to a specific site as of the selected end date for the report.
[New in R11]	<p>Note: If the report is run for a time frame ending before today's date and the req is still posted to a Gateway, the Total days posted is calculated up to and including the report end date.</p> <p>For example, a req was posted to a site on July 1st. You run a report on September 15th. If you select Previous calendar month (which in this example is August) for the Select date range filter, the Total days posted is 62. [To calculate Total days posted, add the number of days in July (31) and the number of days in August (31) for a total of 62.]</p>

If you select **Current** for the date range option, **Total days posted** is 7.

Note: Both examples assume that the req was posted continuously during selected date range.

If a requisition was posted to a site and removed, and then reposted, the data for each separate posting are returned in a separate row for that requisition. If the req was posted prior to October 1, 2007, this column is blank for that req. because the original posting and actual removal date were not captured.

Report Output: Details by Req PDF

The **Details by Req** view displays Req posting data for each gateway the req was posted to at the individual req level.

For each Req ID site, this report view lists the Site name, the Original posting date, Last updated on, Planned removal date, Actual removal date, and Total days posted (as of end date) for all sites to which the req posted in the selected time frame.

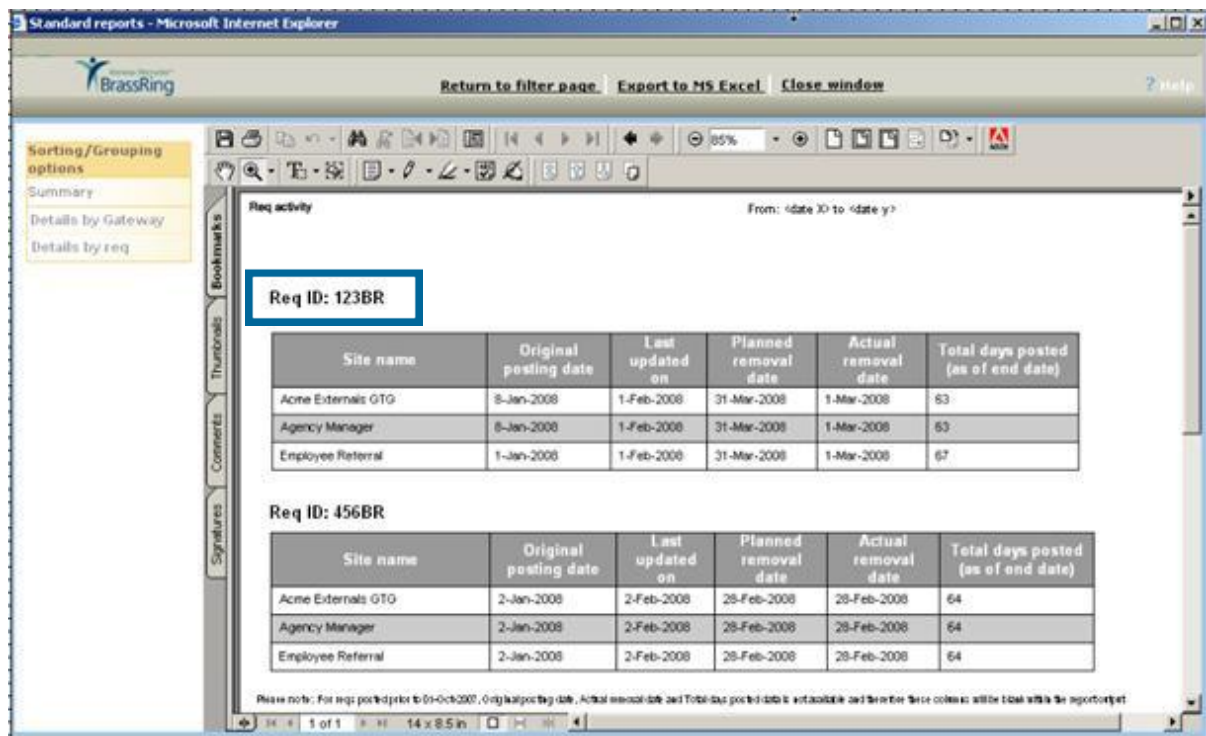
To see the **Details by Req** view:

1. Select the report filters on the Req activity report filter page.
2. Select the output format for the report (in this case Acrobat .pdf).
3. Click **Generate report now**.
4. The sorting/Grouping options display in the report generation window as the report is generating. The report automatically generates in the Summary view by default.
5. Click the **Details by Req** link in the report generation window to refresh the report.
6. The report displays in the view for the selected sorting/grouping option.
7. You can open the report on the spot to view it immediately or save it to your hard drive for later use.
8. Once you have finished you can click links to return to the filter page, export to MS Excel, or close the window.

For information about each field in the report, see page 226.

[New in R11]

The following footnote has been added to report: *“Please note: For reqs posted prior to 01-Oct-2007, Original posting date, Actual removal date, and Total days posted data is not available and therefore these columns will be blank within the report output.”*



The data are listed separately (grouped) under each Req ID. For each Req ID, the data are sorted by Site name: For example, Site name A, Site name B, Site name C.

Reference Table: Details by Req / Sorting by Site

Column	Description
Site name	The label and data are based on your organization’s client settings.
Original posting date	The date the req was first posted to site.
Last updated on	The date the posting was most recently updated.
Planned removal date	The date on which the posting is set to expire.
Actual removal date	The date the req was actually removed from the site. If the req is still posted, this column is blank.
Total days posted (as of end date)	The number (#) of days the req appeared on site as of the selected report end date. The req may still be posted.
Footnote	Reqs posted prior to 10/1/2007 will not have data in some columns

Report Output: Excel Sortable - Sheet 1

The Excel Sortable output for Sheet 1 includes the report name and filters selected (Select date range filter option, Req ID, and Site name) on the report filter page.

A	
1	
2	Req activity
3	
4	From: <date x> to <date y>
5	Req ID:
6	
7	Site name:
8	
9	Please note: For reqs posted prior to 01-Oct-2007, original posting date, actual removal date and total days posted data is not available and, therefore, these columns will be blank within the report output.
10	

Note: For reqs posted prior to 01-Oct-2007, Original posting date, Actual removal date, and Total days posted data is not available and therefore these columns will be blank within the report output.

Report Output: Excel Sortable - Sheet 2

The Excel Sortable output for Sheet 2 includes columns for Site ID, Site name, and Total active jobs (as of end date).

Kenexa removed the columns Total inactive and Total jobs and updated the name of an existing column [Total active jobs (as of end date)].

	A	B	C
2	Site ID	Site name	Total active jobs (as of end date)
3	5173	Acme External GTG	582
4	5179	Agency Manager	23
5	218	Campus Website	15
6	5174	Employee Referral	711
7	5167	New Co-External	0
8	5168	New Co-Internal	0

Reference Table: Excel Sortable – Sheet 2

Column	Description
Site ID	The unique identifier for this site.

Site name	The name of the site which the requisitions are posted to. If your organization uses Global Talent Gateways (GTG), individual Talent Gateways are not listed. Only the GTGs are listed.
Total active jobs (as of end date)	As of R11, this column has been renamed and its calculation method has been changed.
[Renamed column name in R11]	<p>This column returns data for the number of total distinct jobs posted to the gateway as of the end date for the selected date range.</p> <p>If the Req ID filter is used, this column still returns a count of all active jobs for all sites to which the selected req/reqs are posted.</p> <p>If the Site name filter is used, this column returns a count of all active jobs posted to the selected site/sites.</p>

Report Output: Excel Sortable - Sheet 3

The Excel Sortable output for Sheet 3 includes columns for Site name, Req ID (your organization’s label), Original posting date, Last updated on, Planned removal date, Actual removal date, and Total days posted (as of end date).

	A	B	C	D	E	F	G
	Site name	Req ID	Original posting date	Last updated on	Planned removal date	Actual removal date	Total days posted (as of end date)
2	Acme External	123BR	8-Jan-2008	1-Feb-2008	31-Mar-2008	1-Mar-2008	53
3	Acme Internal	123BR	1-Jan-2008	1-Feb-2008	31-Mar-2008	1-Mar-2008	60
4	Agency manager	123BR	8-Jan-2008	1-Feb-2008	31-Mar-2008	1-Mar-2008	53
5	Acme External	456BR	2-Jan-2008	2-Feb-2008	28-Feb-2008	28-Feb-2008	54
6	Acme Internal	456BR	2-Jan-2008	2-Feb-2008	28-Feb-2008	28-Feb-2008	54
7	Agency manager	456BR	2-Jan-2008	2-Feb-2008	28-Feb-2008	28-Feb-2008	54

Reference Table: Excel Sortable – Sheet 3

Column	Description
Site name	The label and data are based on your organization’s client settings.
Req ID	
Original posting date	The date the req was first posted to site.
Last updated on	The date the posting was most recently updated.
Planned removal date	The date on which the posting is set to expire.
Actual removal date	The date the req was actually removed from the site. If the req is still posted, this cell is blank.
Total days posted (as of end date)	The number (#) of days the req appeared on site as of the selected report end date. If the req is still posted, this cell may still be posted.

Effect on Scheduled Reports

Important! Previously, the Req activity report did not have any report filters. Scheduled reports were run based on current posting data.

To insure that users with previously scheduled Req activity reports are not adversely affected by the addition of filters to this report, Kenexa has set the date range filter for those reports to Current.

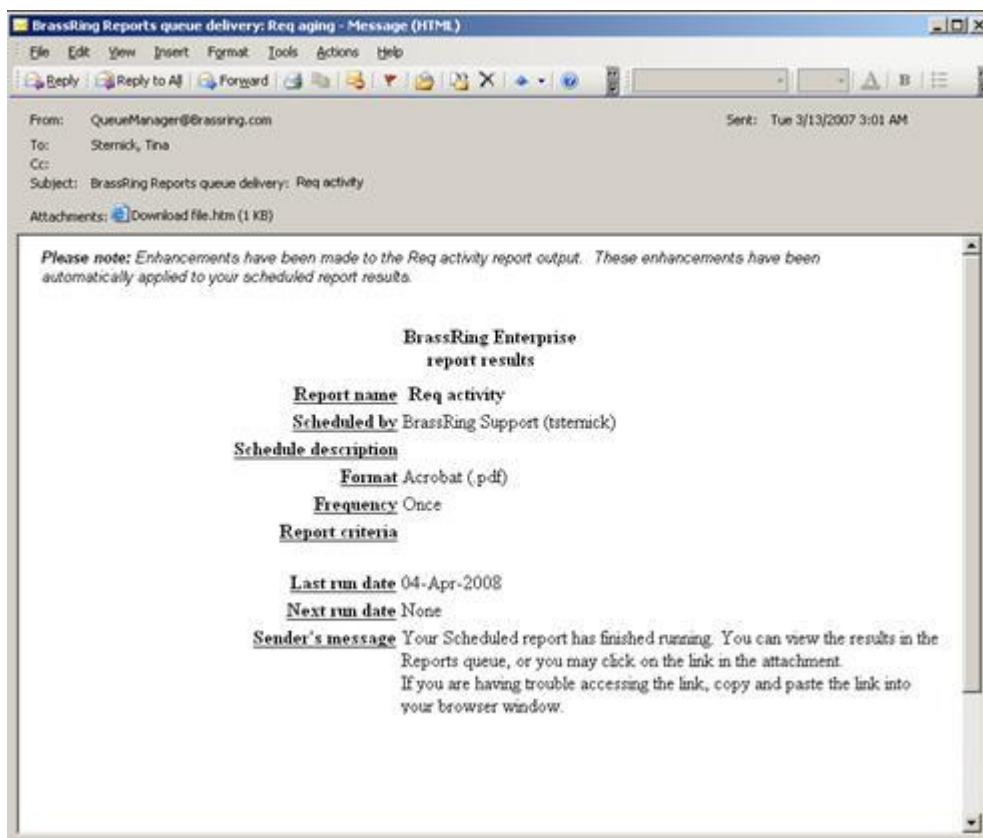
Report Results E-mail Notification Change

[New in R11]

When the Req activity enhancements are put into production, all users with existing report schedules will automatically see the new report output in the scheduled report e-mail results. Because the changes being made to the report affect the actual report output and not the filter criteria used to generate the report, it will not be necessary to void the existing schedules.

Because not all scheduled report recipients may be aware of the report enhancements, we are adding the following format change notification at the top of the results email to insure recipients are not surprised by the changes within the report output: *“Please note: Enhancements have been made to the Req activity report output. These enhancements have been automatically applied to your scheduled report results.”*

Report Results E-mail Notification



Report Results for Date Ranges Before and After 01 October 2007

The database was changed in late September of 2007 to capture complete posting history. Accordingly, there will be no data in the following columns of the new report output for

requisitions posted prior to October 1, 2007: Original posting date, Actual removal date, and Total days posted.

The posting history is captured in a new table. This affects which instances of a posting will appear in the report output. Reqs posted multiple times to the same site will be returned on multiple rows.

For example, assume a req is posted from 01 July 2007 to 31 July 2007, and then posted again from August 2, 2007 to August 10, 2007.

The database structure in existence before 01 October 2007 allowed only one row of data per posting. Therefore, only the most recent posting record is stored and each previous posting record is overwritten.

If the report is run for the date range of 01 July 2007 to 31 July 2007, no record of this req would be returned in the report results.

If the report is run for the date range 01 August 2007 to 10 August 2007, the req will be returned in the report. However, the Original posting date, Actual removal date, and Total days posted columns will be blank because at the time the req was posted, the data that would populate those three columns was not captured in the system. Therefore, only the Last updated on and Planned removal date columns will contain data.

Scenario #1: Req posted for 1st time after 10/1/07

All output columns will contain data, and the Total days posted can be calculated.

In this scenario, when running the report for any date range (assuming October is included), all output columns, including Original posting date, Actual removal date and Total days posted contain data because KRB is capturing the data for all reqs posted after October 1, 2007.

Scenario #2: Req posted for 1st time after 10/1/07; req is un-posted; req is re-posted

In this scenario, the report returns multiple rows for a single req: One row for each time the req is posted and un-posted.

If the report is run for the date range 01 October 2007 to 30 November 2007, two (2) rows will be returned for this requisition and all three columns are populated.

	Original posting date	Actual removal date	Total days posted
Row 1	1-Oct-2007	31-Oct-2007	30
Row 2	2-Nov-2007	10-Nov-2007	8

If the report is run for a time period 1st October to 1st November, one (1) row will be returned for this requisition.

	Original posting date	Actual removal date	Total days posted
Row 1	1 October 2007	31 October 2007	30

If the report is run for a time period 1st November to 30th November, one (1) row will be returned for this requisition.

	Original posting date	Actual removal date	Total days posted
Row 1	2 November 2007	10 November 2007	8

Scenario #3: Req posted before 10/01/2007 and Stays Posted

In this scenario, when running the report for any date range (assuming that the req was posted at some point during the selected range), the report returns no data for this requisition in the Original posting date, Actual removal date, and Total days posted columns because at the time the req was posted, that data was not captured in the system. Only the Last updated on and Planned removal date columns will contain data.

Scenario #4: Req posted and un-posted before 10/01/2007; req reposted after 10/01/2007

Within the revised report logic, the system first looks up the Req ID in the new table. If the Req ID is found in the new table, only the posting history from 1st October and forward will be returned.

If the req has no posting history after October 1st, the system looks up previous posting history. In this case, the posting data prior to October 1st will be returned. The new columns in the report output, Original posting date, Actual removal date, and Total days posted columns will be blank.

Scenario #5: Req posted, un-posted, re-posted, and un-posted prior to 10/01/2007

If the report is run for the date range of 01 July 2007 to 31 July 2007, it will return no results because it does not exist in the posting history table within this date range. The posting history table during that period stored only the most recent posting data.

If the report is run for 02 August 2007 to 08 August 2007, the req will be returned in the report but only the columns Last updated and Planned removal date contain data.

[Summary view](#)

The Summary view returns total number of reqs posted during date range per individual site, even if the Req ID filter is used.

The Details by Gateway and Details by Req views return data only

Details by Req views will only return data for specific filter selections

No enhancements have been made to Posting options page or DEW at this time

Reporting - Site Activity Report Enhancements

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
- Provided a new column definition 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. The enhanced report retrieves more detailed site activity data and more targeted output. Clients can calculate drop-off rates using the Total submissions results.

Costs

There is no additional cost for this feature.

Availability

This feature is available in R10.5 as of November 30, 2007.

Visible Changes

There are no configuration settings for this report. All users with access to report will see the new filters and output format. This report has the following visible changes:

- An updated description on the [Standard Reports Menu page](#): “The report returns activity statistics for the selected Gateway site(s), or for specific requisitions posted to Gateways.”
- New filters on the report filters page.
- New sorting/grouping option for Req ID
- New output captures submissions for Global Talent Gateways, Talent Gateways, Agency Managers, and Req IDs.
- Changes to the presentation of the data to reflect the expanded and changed functionality

Limitations and Known Interactions

Please see the detailed description in these notes.

Overview of Implementation

The new report format is automatically available in Release 10, Build 5 on November 30, 2007.

Site Activity Report Details

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, Sitename, 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.

Site Activity Report Filters

Site activity Help

This report returns activity statistics for the selected Gateway site(s), or for specific requisitions posted to Gateways.

Select date range

Select month(s)

2007-July
2007-June
2007-May
2007-April
2007-March
2007-February
2007-January

[Selection details](#)

Month to date
 Previous calendar month
 Calendar quarter to date
 Previous quarter (all)
 Calendar year to date
 Previous year (all)

Refine your query by selecting from the filtering options below.

Use the [CTRL] key when selecting multiple filters.

Req ID

GTG name

All
Acme GTG
College GTG

[Selection details](#)

Site name

All
Acme External TG
Acme Internal TG
Agency portal
College TG

[Selection details](#)

Site language

All

[Selection details](#)

Select an output format

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.

Site Activity Report Filters

Filter	Description
Select date range	<p>Select months</p> <p>Select up to six (6) months at a time for a report. To select multiple months, hold down [Ctrl].</p> <p>Note: The totals are combined rather than separated by month. [New in R10.5 (December, 2007)]:</p> <p>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.</p> <p>Month to date</p> <p>Previous calendar month</p> <p>Calendar quarter to date</p> <p>Previous quarter (all)</p>
	<p>Calendar year to date</p> <p>[New in R10.5]</p> <p>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.”</p> <p>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).</p>
	<p>Previous year (all)</p> <p>[New in R10.5]</p> <p>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.”</p> <p>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).</p>
Req ID	<p>[New in R10.5]</p> <p>This filter pulls site activity data for a specific req or group of reqs. The default selection is “All.”</p>

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.

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.

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	<p>It groups the data by Site name.</p> <p>The Submissions column indicates number of submissions per site.</p> <p>The Total row does not display.</p>
Yes	<p>It groups the data by GTG name, (Global Talent Gateway name), and then by member Site name.</p> <p>The Submissions column indicates number of submissions per site.</p> <p>The Total row indicates number of submissions per GTG. (For sites not associated with a GTG, the report does not return a “total” row.)</p>

Site Activity Report: Summary View (All languages, all jobs, two (2) GTGs, and all sites)

Set by: GTG name							
GTG name: Global Gateway - ENUK/SPFR							
Site name	Search page hits	Detail page hits	Apply page hits	Submissions	Returned profiles	Search agents assigned	Jobs e-mailed to clients
1111 Plumb	3	0	1	1	0	0	0
Global Inc. - French	15	0	2	3	0	0	0
Global Inc. - Spanish	4	1	1	1	0	0	0
Global Inc. - UK English	2	0	0	0	0	0	0
Total	24	1	5	5	0	0	0
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 clients
Global Inc. - US English	3	0	5	2	0	0	0
Total	3	0	5	2	0	0	0

Graph

Note: The Graph sorting/grouping option, or view, does not return GTG data or req-specific data.

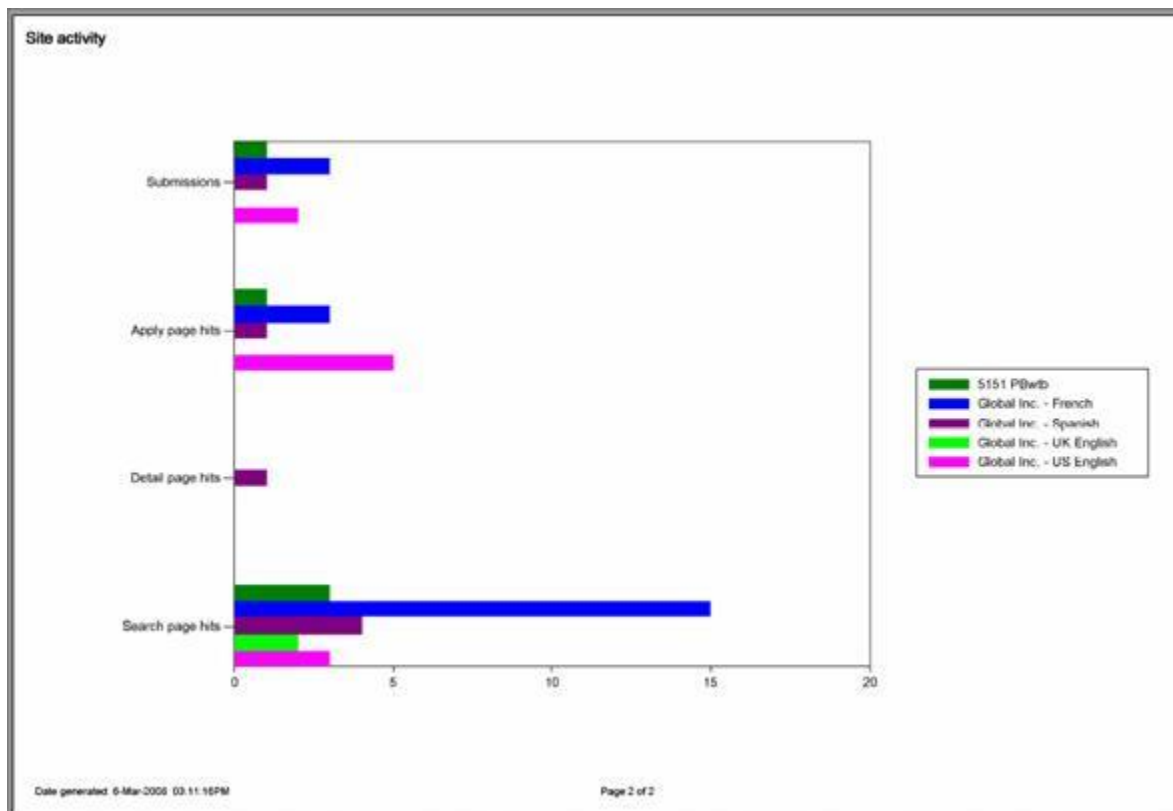
The Graph Sorting/Grouping Option breaks out activity for specific sites.

- Vertical axis | : Displays individual activities
- Horizontal axis — : Displays the counts for each activity, broken down by site

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

Site Activity Report: Graph View (All languages, all jobs, two (2) GTGs, and all sites)



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).

Site Activity: Group by Req ID, Sort by GTGs

Standard reports - Microsoft Internet Explorer

Return to filter page | Export to MS Excel | Close window

Sorting/Grouping options
 Summary
 Graph
 Req-specific

Bookmarks
 Thumbnails
 Comments
 Signatures

Site activity
 Sort by: Req ID

Req ID: 1238R

GTG name: Acme GTG

Site name	Search page hits	Detail page hits	Apply page hits	Submissions
Acme Internal	740	637	100	62
Acme External	500	425	125	120
Total	1240	1062	225	202

GTG name: College GTG

Site name	Search page hits	Detail page hits	Apply page hits	Submissions
Acme Internal	1240	1005	521	501
Acme External	627	715	625	370
Total	2030	1720	1146	871

GTG name:

Site name	Search page hits	Detail page hits	Apply page hits	Submissions
Agency	374	362	351	325
Employee	405	372	245	200

Req ID: 456BR

GTG name: Acme GTG

Site name	Search page hits	Detail page hits	Apply page hits	Submissions
Acme Internal	65	60	55	50
Acme External	135	125	115	105
Total	200	185	170	155

14 x 8.5 in

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].

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.

Site activity

Date range: Oct 2007, Nov 2007, Dec 2007
Site language: English
GTG name: Global Gateway
Site name: ALL
Requisition #: ALL

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. This data is available at a site level only.
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 assigned	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.

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.

[Site Activity Report, No GTGs, PDF Output, Summary View](#)

Field	Description
Report header	Site activity
[new in R10.5]	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]	<p>The <i>Submissions</i> 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.</p> <p>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.</p> <p>Each individual submission per req is counted in the req detail section of the report.</p> <p>To calculate the drop-off rate for each individual site, you can compare data in the “hit” columns with the data in the <i>Submissions</i> column.</p> <p>Important! This means that the submissions total on the summary and detail portions of the report may not match.</p>

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

Site activity
Sort by: Req ID

Req ID: 123BR

Site name	Search page hits	Detail page hits	Apply page hits	Submissions
Asma Internal	748	637	100	82
Asma External	500	426	125	120
Agency	374	302	351	325
Employee Referral	425	372	245	200

Req ID: 456BR

Site name	Search page hits	Detail page hits	Apply page hits	Submissions
Asma Internal	65	60	55	50
Asma External	135	125	115	105

Site Activity Report, No GTGs, PDF Output, Req-Specific View

Field	Description
Report header	<p>Site activity</p> <p>Sort by: [Req ID]</p> <p>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.</p>
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]:

The report returns:	
■ Site name	■ Submissions
■ Search page hits	■ Returned profiles
■ Detail page hits	■ Search agents created
■ Apply page hits	■ Jobs e-mailed to friends

[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 [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 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.
[new in R10.5]	The data in this section are not summed because each site captured in this part of the report is in its own category.

PDF Output: GTGs Implemented / Req-Specific View

[new in R10.5]

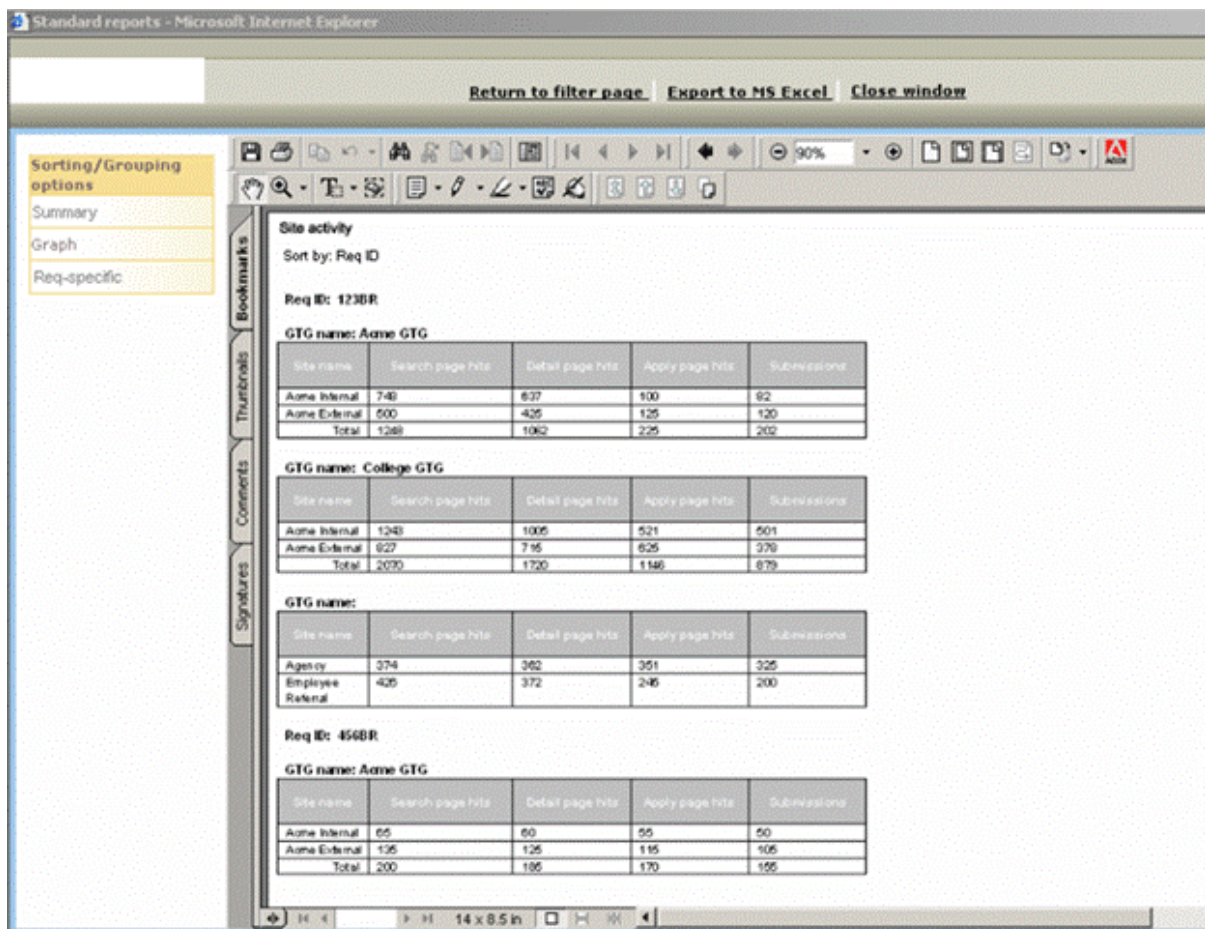
Users with appropriate privileges can use this sorting/grouping option to see site activity broken down by specific requisition.

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

Site Activity Report: PDF / GTGs / Req-Specific View



Site Activity Report, GTGs Implemented, PDF Output, Req-Specific View

Field	Description
Report header	<p>Site activity</p> <p>Sort by: [Req ID]</p> <p>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.</p>
Req ID [New in R10.5]	<p>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.</p>
Report content: GTG Title and output grid	<p>The data are broken down by specific GTG site: TG site to which the job has been posted.</p> <p>When is a site counted under a GTG?</p> <p>A site is counted under a GTG if it meets the following two conditions:</p>

	<p>1. At the time a candidate action is tracked, the site is a member of a GTG, AND</p> <p>2. At the time the report is run the site is still a member of that GTG.</p> <p>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.</p>
Submissions	<p>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.</p> <p>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.</p> <p>Each individual submission per req is counted in the req detail section of the report.</p> <p>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.</p> <p>Important! This means that the submissions total on the summary and detail portions of the report may not match.</p>
Total row	The data are summed for each column in this row.
GTG name: <blank>	<p>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.</p> <p>The data in this section are not summed because each site captured in this part of the report is in its own category.</p>
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.

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: No GTGs / Sheet 2: Site-Specific Data: No GTGs Implemented / Sheet 2: This sheet organizes the data by Site name.

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

Running a Site Activity Report

To select filter criteria for the Site activity report follow these steps:

See page 235 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.

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.

Reporting - Source Tracking UI Enhancements

With Release 11, Kenexa significantly improved the ability to track sources at the level of the individual requisition in the Source yield standard report (see page 235 for more information). In addition, the report now includes the four standard configurable filters and output fields available in several other standard reports: Department, Location/Division, Manager, and Recruiter.

To support the source tracking improvements, we made it possible to manually attach codes to specific resumes from within several task sequences within Kenexa Recruiter BrassRing. (In previous releases, source codes were attached to only the most recent submissions.)

Benefits

These enhancements improve the capture of source code data which is used for reporting. Your organization can more easily ascertain the efficacy of different candidate sources at the level of the individual requisition. In the Source yield report itself, your organization can customize filters and output fields based on organizational requirements.

Cost

There is no additional cost associated with this feature.

Availability

Release 10

Visible Changes

KRB users with the appropriate privileges will see changes in filters, sorting/grouping options, and output.

Limitations and Known Interactions

None

Overview of Implementation

KRB Users: When working from within several task sequences, KRB users can manually attach a code to an individual candidate submissions or to multiple candidates at once.

Reporting - Source Yield Report

This report provides data regarding the effectiveness of your sourcing tools, by volume and by hires produced. The two measurements of sourcing effectiveness are:

- Ratio of hires by total volume for the source
- Percentage (%) of hires for that source out of the total volume for that source on a per req basis, unless sorted by one of the other sorting/grouping options.

Kenexa Recruiter BrassRing provides three options for designating the source for a candidate. Your organization selects one of them at implementation time:

- The initial source from which the candidate was received
- The last source from which the candidate was received
- The source designated on a specific form for a candidate by a user of Kenexa Recruiter BrassRing.

Your organization's Source yield report tells you which method your organization uses to determine source directly below the report descriptions on the report filter page: "Your organization currently uses method #*n*.(where *n* = 1, 2, or 3)."

Changes to Report Filters

Kenexa added Req ID and additional req field-based filters, permitting clients to retrieve detailed data at the level of the individual requisition.

Note: All field-based filters display the client's custom label for that standard field, if it exists.

- Req ID
- Department
- Location/Division
- Manager
- Recruiter
- Include % Diverse hires within report output?

Changes to Report Output

The Source yield report now returns requisition-specific source data.

The default view for the report output is grouped by Req ID. Each row in the report displays source data for a specific req. The grid below the individual requisition data lists the

candidate sources for that requisition and the following counts: Total volume, Total not interested, Total hired, and overall percentage data. The report returns totals in these categories for each requisition. The % Diverse Hires output column is calculated and displays on the report output only if you select Yes for Include % Diverse hires within report output? on filter page.

Note: Your organization can elect to configure HR statuses to be included under the designation of “Not interested” statuses. Kenexa personnel configure these settings in Workbench. The “Not interested” statuses apply to the Source yield report only for Release 11. The HR statuses which are designated as “not interested” statuses are reflected in the Not interested report columns. Clients cannot designate an HR status to be both a “Not interested” status and a “Hired” status.

Source Yield Report Output:

Req Id	Total volume	Total Not interested	Total hired	% Not interested	% Total Hired	% Diverse Hires
	25	24	1	96%	4%	0%
	6	3	3	50%	50%	33%

Changes to Sorting / Grouping options:

Req Id replaces Source code and is the default sorting option.

Location / Division, Department, Manager, and Recruiter are new sorting / grouping options and output columns.

The "Total Not Interested" column replaces the "Total viewed" column.

The "% Not interested" column replaces the "Volume:hires ratio" column.

Changes to Sorting/Grouping Options

The sorting/grouping options were changed as follows:

- The “Req ID” sorting/grouping option replaces the “Source code” sorting/grouping option. “Req ID” is the default sorting option for the report.
- The “Total volume,” “Total viewed,” and “Total hired” sorting/grouping options have been removed from the report.

- Four new sorting/grouping options have been added to the report to correspond to the new requisition-field based filters and output fields.

Changes to Report Columns

The following columns were changed in the Source yield report:

- The “Total Not Interested” column replaces the “Total viewed” column.
- The “% Not interested” column replaces the “Volume:hires ratio” column
- The “% Duplicates” column has been removed from the report output.

Changes to the Source Yield Graph

The Source yield graph was changed as follows:

- It displays aggregated data for all sources returned in the report.
- The Total viewed column was removed and three (3) new columns, Total Not interested, % Total Not interested, and % Diverse hires, were added.
- When you use one of the new sorting/grouping options, this graph updates and displays the aggregated numbers based on the sorting/grouping selection.

Source	Total volume	Total Not interested	Total hired	% Total Not interested	% Total hired	% Diverse hires
Other	2	0	0	0%	0%	0%
Agency	0	0	0	0%	0%	0%
Campus Recruiting	0	0	0	0%	0%	0%
Employee Referral	0	0	0	0%	0%	0%
Internal	0	0	0	0%	0%	0%

Source Yield Graph Columns

Field	Description
Total volume	Represents total number of resume/CV submissions received from the source. Note: If the same candidate has come in via multiple sources, he or she will be attributed to each source he/she has come in from.
Total Not interested [new in R11]	Returns, per source, the total number of candidates moved to one of the “Not interested” statuses designated with the WB report setting within the selected time frame.

Total hired	Represents total number of candidates hired for the specified date range. Note: This is defined based on your organization's designated "Hired" HR statuses.
% Total Not interested	Return, per source, the % of candidates moved to the client-designated "Not interested" statuses.
[New in R11]	
% Diverse hires	Returns, for each source, the % of hired candidates that meet the client's definition of a 'diverse' candidate as configured for the "Diversity hires" report setting.
[New in R11]	
	The calculation is # of total hires / # of diverse hires. [(Number of total hires) divided by (Number of diverse hires)] (Note: This column was previously available in the report results but not in the graph.) This column displays only if you select Yes in the "Include % Diverse hires column in report output?" option on the report filter. If you selected No for this filter, the column does not appear in the report output.

Changes to the Source Yield Panel

Source	Total volume	Total not interested	Total hires	% Total hired
U.S. English Gateway	16852	8929	27	10%
Internal Gateway	85	71	10	3%
Employee Referral	160	100	23	8%
Internet - Hotjobs	39	28	0	0%
Internet - Monster	372	155	1	0%

The Total not interested column replaces the "Total viewed column.

The Total Not interested column returns, for each source, the total number of candidates moved to one of the Not interested statuses (configured in Workbench for the client as part of the Report settings) within the designated date range for the panel..

Run the Source Yield Report

To configure and run this report:

1. In KRB, select Reports > Standard Reports.

2. On the Standard reports menu page, click Source yield in the TRM dashboard reports area.
3. Select the date range filter.
4. Select the other filters.
5. Select the output format.
6. Select Generate report now. The default sorting/grouping option for the Source yield report is Req ID (the client's unique identifier for each requisition).
7. The report results are displayed in the output format you selected on the Report filter page.
8. Once the report is generated, you can select a different sorting/grouping option and the report results will be redrawn to group the data by that selected option.
9. You can click Return to filter page to re-filter the report with another filter, Export to MS Excel, OR Close window.

You can also configure and set up a schedule for the report to run once or on a regular schedule. See the Kenexa Recruiter BrassRing online Help for more information.

Report Filters

With Release 11, the Source yield report includes a set of standard filter fields which are exchangeable for other req fields: Department, Location/Division, Recruiter, and Hiring manager. KRB users with access to this report will see the new standard filter fields.

Once Release 11 ships, clients must work with their Kenexa Technical Consultant to configure other req fields in the place of the standard ones.

Filter Options	Description
Select date range	<p>The date range criteria are the same as for most other Standard reports.</p> <ul style="list-style-type: none"> ■ Begin Date / End Date ■ Month to date ■ Previous calendar month ■ Calendar quarter to date ■ Previous quarter (for equivalent time period)

	<ul style="list-style-type: none"> ■ Previous quarter (all) ■ Calendar year to date ■ Previous year (for equivalent time period) ■ Previous year (all)
<p>Req ID [or client's custom label]</p> <p>[New in R11]</p>	<p>This filter is not required to execute the report.</p> <p>This is a multi-select list.</p> <p>You can pull the source data for a specific req or a group of reqs. Press down the Ctrl key and select each additional item in the list.</p> <p>You can see a list of specific requisitions to which you have access according to your user privileges.</p> <p>[Note: The Client Setting Req Trigger determines how the req IDs are designated. If Req Trigger is set to Auto or No, the report displays the KRB AutoReqID. If Req Trigger is set to Optional, the report displays the client's optional req ID for each requisition.]</p> <p>KRB displays your organization's custom label for the Req ID field in the locale of the user accessing it. If the translated value is unavailable for the user's locale, the field name displays in the base locale.</p> <p>Org Group Security: You can see only the req IDs associated with the Org Group(s) to which you belong. Org Group membership controls which req templates you have access to.</p> <p>For example, assume that a user is associated with Org Group A and Org Group A has access only to Req Template A. When that user launches this page, he or she sees only the requisitions associated with Req Template A.</p> <p>My/All Reqs Security: You can see only the requisition IDs for which you have the appropriate viewing privileges.</p> <p>If you have access to view My reqs – Open you can see the list of open requisitions for which you are the hiring manager, recruiter, or req team member.</p> <p>Note: If you do not have access to view any requisitions, this filter will be hidden and the report will return only generic source data not tied to requisitions.</p>

Department [or exchanged field]

[New in R11]

This filter is not required to execute the report. It is always a multi-select list, regardless of the field type of the form field it pulls data from.

Use this filter to restrict the report results to a specific department(s), or the data category your organization uses in place of department.

The Filter Label: The label for this filter is pulled from the “Department” Reporting Label report setting in Workbench. Your organization may have exchanged “Department” for a different field, in which case the filter label would reflect that change. [In Workbench, select Tools > Settings > Reports > Shared settings tab. Scroll to the Custom requisition fields section.]

If no label is specified in the Workbench setting, KRB Standard Reports displays the first 25 characters of the configured field's label for this filter.

KRB displays the label in the user’s locale. The translated values come from the Workbench Reporting Label report setting.

If no translation is available, KRB Standard Reports display the first 25 characters of the field label in your organization’s base locale (if that specific field label has not been translated).

The data pulled by this filter: This filter pulls data from either the standard requisition “Department” field, or from a custom requisition form field configured for your organization.

Org Group Security: If your organization uses the standard “Department” requisition field with this filter, there is no security impact because “Department” must appear on all req templates.

If your organization uses a custom req field for this filter, this filter option is visible only to users who belong to the Org group associated with the req template in question. In other words, if the field is not available on the req template assigned to your Org group, it does not display as a filter option on this report.

Field Level Security: If your organization uses the standard “Department” requisition field with this filter, there is no security impact because “Department” must appear on all req templates.

	<p>If your organization uses a custom requisition field for this filter, this filter option is visible only to users with User Type privileges to see this field on requisitions.</p>
<p>Location / Division</p> <p>[New in R11]</p>	<p>This filter is not required to execute the report.</p> <p>Use this filter to restrict the report results to specific location(s)/division(s), or to a category represented by a custom requisition field. The default selection is “All.”</p> <p>This filter is always a multi-select list, regardless of the field type of the form field it pulls data from.</p> <p>The filter label: The label for this filter is pulled from the “Location/Division” Reporting Label report setting in Workbench.</p> <p>Your organization may have exchanged “Location/Division” for a different field, in which case the filter label would reflect that change. [In Workbench, select Tools > Settings > Reports > Shared settings tab. Scroll to the Custom requisition fields section.]</p> <p>If no label is specified in the Workbench setting, KRB Standard Reports display the first 25 characters of your organization’s custom field label (from your organization’s req template) for this filter.</p> <p>KRB displays the label in the language of the user’s locale. The translated values come from the Workbench Reporting Label report setting.</p> <p>If no translation is available, KRB Standard Reports displays the first 25 characters of the field label in the organization’s base locale (if that specific field label has not been translated).</p> <p>The data pulled by this filter: The data for this filter is pulled either from the standard “Location/Division” requisition field or from a custom requisition form field specified by your organization.</p> <p>Org Group Security: If your organization uses the standard “Location/Division” req field for this filter there is no security impact because “Location/Division” must appear on all req templates.</p> <p>If your organization has replaced this field with a custom req field on a req template, KRB users can use it as a filter only if they belong to the Org group associated with the req template in question.</p>

	<p>If the field is not available on the req template assigned to your Org group, it does not display as a filter option on this report.</p> <p>Field Level Security: If your organization has replaced this field with a custom req field, users can use it as a filter option only if they have User Type privileges to see this field on the requisition.</p>
<p>Manager</p> <p>[New in R11]</p>	<p>This filter is not required to execute the report.</p> <p>Use this filter to restrict the report results to specific manager(s), or to a category represented by a custom requisition field. The default selection is “All.”</p> <p>This filter is always a multi-select list, regardless of the field type of the form field it pulls data from.</p> <p>The filter label: The label for this filter is pulled from the “Hiring Manager” Reporting Label report setting in Workbench. Your organization may have exchanged “Hiring Manager” for a different field, in which case the filter label would reflect that change. [In Workbench, select Tools > Settings > Reports > Shared settings tab. Scroll to the Custom requisition fields section.]</p> <p>If no label is specified in the Workbench setting, KRB Standard Reports display the first 25 characters of your organization’s custom field label (from your organization’s req template) for this filter.</p> <p>KRB displays the label in the language of the user’s locale. The translated values come from the Workbench Reporting Label report setting.</p> <p>If no translation is available, KRB Standard Reports displays the first 25 characters of the field label in the organization’s base locale (if that specific field label has not been translated).</p> <p>Org Group Security: If your organization uses the standard “Hiring manager” req field for this filter, there is no security impact because “Hiring manager” must appear on all req templates.</p> <p>If your organization has replaced this field with a custom req field on a req template, users can use it as a filter option only if they belong to the Org group which can use the req template in question.</p> <p>If the field is not available on the req template assigned to your Org group, this filter option does not display for this report.</p>

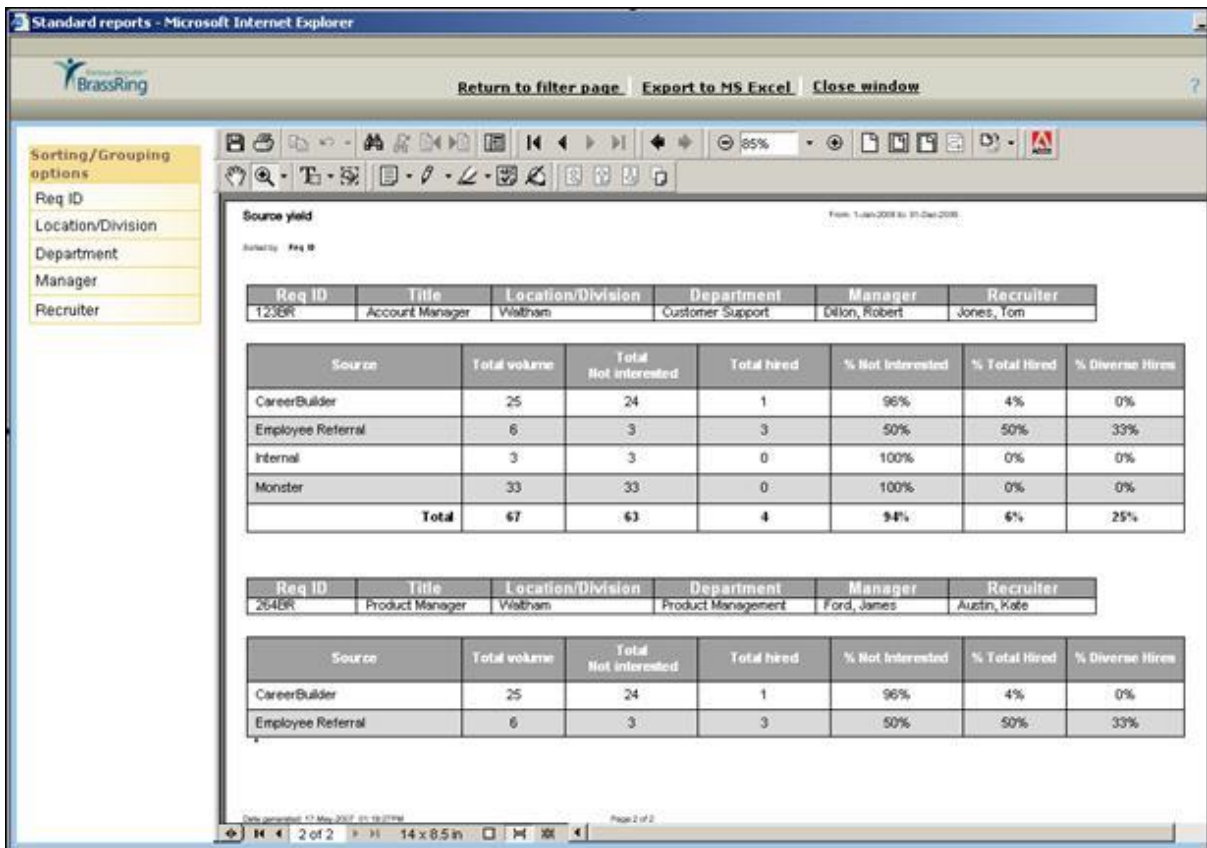
	<p>Field Level Security: If your organization has replaced this field with a custom req field, users can use it as a filter option only if they have User Type privileges to see this field on the requisition.</p>
<p>Recruiter</p> <p>[New in R11]</p>	<p>This filter is not required to execute the report.</p> <p>Use this filter to restrict the report results to specific recruiter(s), or to a category represented by a custom requisition field. The default selection is “All.”</p> <p>This filter is always a multi-select list, regardless of the field type of the form field it pulls data from.</p> <p>The filter label: The label for this filter is pulled from the “Recruiter” Reporting Label report setting in Workbench. Your organization may have exchanged “Recruiter” for a different field, in which case the filter label would reflect that change. [In Workbench, select Tools > Settings > Reports > Shared settings tab. Scroll to the Custom requisition fields section.]</p> <p>If no label is specified in the Workbench setting, KRB Standard Reports displays the first 25 characters of your organization’s custom field label (from your organization’s req template) for this filter.</p> <p>KRB displays the label in the language of the user’s locale. The translated values come from the Workbench Reporting Label report setting.</p> <p>If no translation is available, KRB Standard Reports displays the first 25 characters of the field label in the organization’s base locale (if that specific field label has not been translated).</p> <p>If the field is customized and it pulls data from the KRB user table, you can select and order of “Last, First” or “First, Last” for user names. If pulled from elsewhere, all data displays as it does in KRB.</p> <p>The data pulled by this filter: The data for this filter is pulled either from the standard “Recruiter” requisition field or from a custom requisition form field specified by your organization.</p> <p>Org Group Security: If your organization uses the standard “Recruiter” field on the requisition, there is no security impact because “Recruiter” must appear on all req templates.</p> <p>If your organization has replaced this field with a custom req field on the req template, KRB users can use it as a filter only if</p>

	<p>they belong to the Org group associated with the req template in question.</p> <p>If the field is not available on the req template assigned to your Org group, it does not display as a filter option on this report.</p> <p>Field Level Security: If your organization has replaced this field with a custom req field, users can use it as a filter option only if they have User Type privileges to see this field on the requisition.</p>
<p>Include % Diverse hires within report output? (Selecting “Yes” may increase report generation timeframe.)</p> <p>[New in R11]</p>	<p>By default, No is selected</p> <p>When No is selected, the % Diverse hires column is not included in the report output.</p> <p>When Yes is selected, the % Diverse hires column is the last column in all formats of the report output and in the report graph.</p> <p>Because of the data-intensive nature of the calculation to determine diverse candidates, selecting Yes may have a performance impact when generating the report.</p>

Report Output

The output formats for this report are:

- Acrobat (.pdf)
- Excel Sortable (.xls)
- Formatted Excel (.xls)
- Extensible markup (.xml)
- Image file (.tif)
- Office web (.mhtml)
- Tab delimited (.csv)



Each output format contains the fields listed below except where exceptions are noted.

Report Output Field	Description
Req ID	By default, the Source yield report is sorted by Req ID.
[new in R11]	<p>The Req ID column is controlled by [ReqTrigger] a client setting. If the [ReqTrigger] client setting is set to “Auto” or “No”, the report pulls and displays requisition data using the KRB AutoReqID.</p> <p>If the [ReqTrigger] client setting is set to Optional, the report pulls and displays requisition data using the client's optional req ID.</p> <p>The report pulls this column's label from the client-defined label for either AutoReq ID or Optional Req ID based on the ReqTrigger client setting.</p>
Title	The client-defined label for the standard “Title” field on the requisition. The column displays the job title associated with the listed requisition.
Department	Your organization can use the standard “Department” req field or exchange this standard field for either another standard req field or custom req field.
[new in R11]	Your organization's configuration of the requisition fields report settings determines what data displays in this field and how it is labeled.

	<p>Org Group Security: If your organization uses the standard “Department” requisition field there is no security impact because “Department” must appear on all req templates.</p> <p>If a custom requisition field is substituted for this field, only those users who belong to the Org Groups for which the source field is visible on the requisition can see the data in this field.</p> <p>If this field is not available on the requisition template associated with the user's assigned Org Group, then the data in this column are replaced with the “*” character.</p> <p>Field Level Security: If your organization uses the standard “Department” requisition field with this field, there is no security impact because “Department” must appear on all req templates.</p> <p>If your organization uses a custom requisition field for this field, this field is visible only to users with User Type privileges to see this field on requisitions.</p> <p>If this field is not visible for the user's assigned User Type, then the data in this column are replaced with the “*” character.</p>
<p>Location / Division [new in R11]</p>	<p>Your organization can use the standard “Location/Division” req field or exchange this standard field for either another standard req field or custom req field.</p> <p>Your organization’s configuration of the requisition fields report setting determine what data displays in this field and how it is labeled.</p> <p>Org Group Security: If your organization uses a custom req field for this filter, this filter option is visible only to users who belong to the Org group associated with the req template in question. If a custom requisition field is substituted for this field, the data within the field should appear only for users belonging to the Org Groups in which the source field is visible on the requisition.</p> <p>If this field is not available on the requisition template associated with the user's assigned Org Group, then the data in this column are replaced with the “*” character.</p> <p>Field Level Security: If your organization uses a custom requisition field for this field, this field is visible only to users with User Type privileges to see this field on requisitions.</p> <p>If this field is not visible for the user's assigned User Type, then the data in this column are replaced with the “*” character.</p>

<p>Manager</p> <p>[new in R11]</p>	<p>Your organization can use the standard “Manager” req field or exchange this standard field for either another standard or custom req field.</p> <p>Your organization’s configuration of the requisition fields report settings determines what data displays in this field and how it is labeled.</p> <p>Org Group Security: If your organization uses the standard “Hiring Manager” requisition field there is no security impact because “Hiring Manager” must appear on all req templates. The Hiring Manager name displays in “Lname, Fname” format.</p> <p>If a custom requisition field is substituted for this field, only those users who belong to the Org Groups for which the source field is visible on the requisition can see the data in this field.</p> <p>If this field is not available on the requisition template associated with the user's assigned Org Group, then the data in this column are replaced with the “*” character.</p> <p>Field Level Security: There is no security impact for this field if the standard Hiring Manager field on the requisition is used because this field must appear on all req. templates.</p> <p>If your organization uses a custom requisition field for this field, this field is visible only to users with User Type privileges to see this field on requisitions.</p> <p>If this field is not visible for the user's assigned User Type, then the data in this column are replaced with the “*” character.</p>
<p>Recruiter</p> <p>[new in R11]</p>	<p>Your organization can use the standard “Recruiter” req field or exchange this standard field for either another standard or custom req field.</p> <p>Your organization’s configuration of the requisition fields report settings determines what data displays in this field and how it is labeled.</p> <p>Org Group Security: If your organization uses the standard “Recruiter” requisition field there is no security impact because “Recruiter” must appear on all req templates. The Recruiter name displays in “Lname, Fname” format.</p> <p>If a custom requisition field is substituted for this field, only those users who belong to the Org Groups for which the source field is visible on the requisition can see the data in this field.</p>

	<p>If this field is not available on the requisition template associated with the user's assigned Org Group, then the data in this column are replaced with the “*” character.</p> <p>Field Level Security: There is no security impact for this field if the standard Recruiter field on the requisition is used because this field must appear on all req. templates.</p> <p>If your organization uses a custom requisition field for this field, this field is visible only to users with User Type privileges to see this field on requisitions.</p> <p>If this field is not visible for the user's assigned User Type, then the data in this column are replaced with the “*” character.</p>
Total Not interested [new in R11]	<p>For each source listed, the report column displays the total number of candidates moved to one of the client-designated “Not Interested” statuses within the selected data range. (This is configured within the “Not Interested Statuses” report setting in Workbench.)</p> <p>Note: Candidates who have been moved to multiple “Not interested” statuses within the selected time frame are counted only once per source.</p>
% Not interested [new in R11]	<p>This column displays, for each source listed, the % of candidates moved to one of the designated “Not interested” statuses.</p> <p>The calculation is (Total Not interested/Total volume *100).</p>
% Diverse hires [Renamed in R11]	<p>This column returns the % of hired candidates (for that source) that are considered “diverse” based on the client-defined diversity identifiers.</p> <p>The definition of a “diverse” candidate is configured within the report settings in Workbench.</p> <p>The % Diverse hires column displays if you selected Yes for the filter Include % Diverse hires column in report output? on the report filter page.</p> <p>If you selected No for that filter, this column does not appear in the report output.</p>
Total row [new in R11]	<p>This row totals categories for each individual req returned in the report, either as a total number or a total percentage (%) value.</p> <p>For example, to calculate “Total % Not Interested”:</p> <p>Total % Not Interested = Total not interested (63)/Total volume (67) * 100 (94%)</p> <p>This is calculated in the Diverse hires column as follows: Total # of diverse hires / the total # hires *100.</p>

Note: The “# of diverse hires” is not visible within the report; it is the result of an internal calculation.

How is Security Applied to the Report Output?

Users can see report results based on their specific User Type and Org group privileges that determine data access.

Org Group Security: Only requisition data associated with Org Groups to which the user has access privileges are returned in the report results. For example, Org Group A has access to req. template A. When a user belonging to only Org Group A executes this report, only data for Org Group A requisitions is returned in the results.

Field Level Security: This report does not apply field-level security.

My/All Req Security: Only data associated with requisitions to which the user has viewing privileges are returned in the report results.

Based on the user's User Type My/All req. privileges, the report displays data for requisitions for which the user is a team member, recruiter or hiring manager. If the user has an “All reqs” privilege selected, then all requisitions in that status appear in the report results. If the user does not have privileges to view any requisitions, then this report does not return any data.

For example, User Type C only has privileges to view My Open reqs. When a user associated with User Type C runs this report, only data for that user's Open reqs are returned in the report results.

Sorting/Grouping Options

The sorting/grouping options for the report, prior to configuration, are: Req ID (the default), Department, Location/Division, Manager, and Recruiter.

You have access to sorting/grouping options for which you have the appropriate privileges and group memberships of various types. You do not see sorting/grouping options in the list if you do not have privileges for the specific field that relates to a particular sorting/grouping option.

To use a sorting/grouping option that you do have access to:

1. Click one of the sorting/grouping options in the list.
2. The report results refresh and re-display the report data grouped by the sorting/grouping option you selected.

The default sorting/grouping option is Req ID. This option breaks out the source data by individual requisition. When you select a different sorting/grouping option, the report sorts and groups all of the source data anew using the selected alternative sorting/grouping criterion.

The Location/Division sorting/grouping option breaks out the data by location/division. The report returns all of the sources associated with the candidates by one or more specific location/divisions (based on the requisitions to which the candidates are filed.). See the example report in the screen capture below.

Example: Location/Division Sorting/Grouping Option

Standard reports - Microsoft Internet Explorer

Return to filter page | Export to MS Excel | Close window

Sorting/Grouping options

- Req ID
- Department
- Location/Division
- Manager
- Recruiter

Source yield

Location/Division: Waltham

Source	Total volume	Total Req interested	Total hired	% Req interested	% Total hired	% Decrease firm
CareerBuilder	25	24	1	96%	4%	0%
Employee Referral	6	3	3	50%	50%	33%
Internal	3	3	0	100%	0%	0%
Monster	33	33	0	100%	0%	0%
New York Times	9	7	2	78%	22%	50%
Website	82	81	1	99%	1%	0%
Workforce magazine	3	2	1	67%	33%	100%
Total	161	153	8	95%	5%	38%

How Security is Applied to Sorting/Grouping Options

Org Group Security: There is no security impact for the Department, Manager and Recruiter sorting/grouping options if the standard requisition fields on the requisition are used because these fields must appear on all Req templates.

If a client has configured another requisition field in place of Department, Manager, and/or Recruiter, the sorting/grouping options related to each source field appear only for users belonging to Org Groups for the applicable source field is visible on the Req template.

The Location/division sorting/grouping option appears only for users belonging to Org Groups for which the source fields is visible on the Req template.

Field Level Security: If a client has configured another requisition field for Department, Manager, and/or Recruiter, the sorting/grouping options related to each source field appear only for users with User Type privileges which make the source field(s) visible on the Req template.

The Location/Division sorting/grouping option appears only for users with User Type privileges which make the source field visible on the Req template.

Labels for the sorting/grouping options match labels for the filter and output column labels based on each client’s configuration.

Where Does the Report Pull Source Data From?

The Candidate source report setting configuration in Workbench determines how the source data how the Source yield report derives the report data. The report works slightly differently depending on which source option your organization selects for the Candidate source report setting. The source options are:

- Pull source from forms:
 - Single per req
 - Multiple per req
 - Single per candidate
 - Multiple per candidate
- Pull source from code type

Pulling a Source from a Form Field

If the Workbench report setting for Candidate source is set to Pull source from form, the report pull the source from the form field designated by the client, as long as the form field has been completed or populated.

Single-per-req Forms

In the first example, the candidate is filed to two reqs and the single-per-req form is completed for both reqs.

Candidate A

REQ	123BR	456BR
Form type	Single per req form attached	Single per req form attached
Form (from which candidate source pulls source data)	Application data record	Application data record
Form field	“How did you hear about us?”	“How did you hear about us?”
Completed / Not completed	Completed	Completed
Data pulled	Monster	CareerBuilder

What happens in the report?	Candidate is counted in the “Monster” source row for Req 123BR	Candidate is counted in the “CareerBuilder” source row for Req 456BR
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In the second example, the candidate is filed to two reqs, but the single-per-req form is complete for only one req. A candidate filed to a req who has not completed the specific form for the req is counted in the None column for that req.

Candidate B

REQ	123BR	456BR
Form type	Single per req form attached	Single per req form attached
Form (from which candidate source pulls source data)	Application data record	Application data record
Form field	“How did you hear about us?”	“How did you hear about us?”
Completed / Not completed	Completed	Not completed
Data pulled	CareerBuilder	None
What happens in the report?	Candidate is counted in the “CareerBuilder” source row for Req 123BR.	Candidate is counted in the “None” source row for Req 456BR

Multiple-per-req Forms

If the form field data is pulled from a multiple per-req type form, then the most recent specific correlated response for that requisition will be counted in the report.

That is, if the candidate has multiple forms completed for req 123BR, the source data is calculated based on the most recent form completed for req 123BR.

If a candidate is filed to a req but does not have that specific form completed for that req, then that candidate is counted in the “None” column for that req.

For example, a Candidate source is configured to pull source data from the multiple per-req “Interview” form field = “How did you hear about us?” Candidate A has this form completed three times for req 123BR. The 123BR responses = “Monster”, “CareerBuilder” and “Website”, with “Monster” being the response from the most recently completed form. When the report is run, and req 123BR is returned, a source row for “Monster” would be returned for 123BR.

Single-per-candidate Forms

If the form field data is pulled from a single per candidate form, then the same source data would be returned for all reqs within the report. This is not a recommended configuration because source data is not being captured on a per req basis and the report would have inaccurate information.

Multiple-per-candidate Form

If the form field data is pulled from a multiple per candidate form, then the most recent response for the configured source field would be returned for all reqs within the report. This is not a recommended configuration because source data is not being captured on a per req basis and the report would have inaccurate information.

Pulling a Source from a Code Type

If the client is pulling source codes from code types, the code for the code type selected in the Candidate source configuration accompanies the candidate's submission against a specific requisition.

For example, a Candidate source is configured to pull source data from the Specific Source code type. When Candidate A applied to req 123BR, the specific source passed with the candidate = "Website" and when they applied to req 456BR, the specific source passed with the candidate = "Hot Jobs". Within the report results, for req 123BR, the candidate is counted against the "Website" source and, for Req 456BR, the candidate would be counted against the "Hot Jobs" source.

When electing to "Pull source from code type", clients can also designate which instance of a code should be considered for reporting, "First" or "Most recent." This attribute now is applicable only if the candidate made multiple submissions for the same requisition.

Example 1

- Candidate source pulls source data from the "Most recent" specific source code type.
- Candidate A applied three (3) times to Req 123BR.

Submission No.	Source Selection
1st	"Monster"
2nd	"CareerBuilder"
3rd	"Website"

- The candidate is counted against the source "Website" in the report results.

Example 2

- Candidate source pull its source data from the "First" specific source code type.
- Candidate A applied three (3) times to Req 123BR.

Submission No.	Source Selection
1st	“Monster”
2nd	“CareerBuilder”
3rd	“Website”

- The candidate is counted against the source “Monster” in the report results.

Counting Jobless Submissions

The report pulls candidates based on their submission date. The candidate’s submission must have both a requisition ID and a source code attached in order to be counted in the report under a specific source for a specific requisition.

If a candidate did not apply to a specific position, but is later filed to a requisition, then the candidate is reported against the source selected at time of submission, but is not reported against a specific requisition. The candidate will appear under the “Req ID = <blank>” section in the report unless a KRB user manually assigns a req code to the submission.

As of Release 11, KRB users can manually associate codes to specific candidate submissions. See below on page 235 for more information.

Best Practice Recommendation: One Source Code Per Submission

Kenexa recommends that clients do not permit the assignment of more than one source code to a single submission.

In the case where clients are passing more than one source code with individual submissions, those submissions are counted for each source code passed. This means that totals within the report will not be accurate.

For example, assume a client on their Talent Gateway is auto-passing a source called “Internal” and allowing the candidate to select a source from a question “How did you hear about us?”

Within the report, for that specific req, the candidate would be counted against both sources since both came in with the submission. If that candidate ends up getting hired, the report displays a “hired” count for the candidate against both sources as well. For this reason, it is advised that clients do not pass multiple codes of the same code type within a single submission.

Use Web Enabled Mobile Devices for Approvals

With Release 11, Kenexa Recruiter BrassRing extends the ability to work with requisitions and candidate forms using web-enabled mobile devices. Mobile device users can take an extended set of actions on requisitions and candidate forms from their mobile device.

The total number of fields that can be designated for display on mobile devices is 200 (100 req standard fields and 100 custom fields).

Note: There are currently only twenty-nine (29) standard fields in the system. The additional space allocated to standard fields will allow the set of standard fields to grow in the future.

Req custom fields: Clients can configure up to one hundred (100) fields for display on mobile devices. These fields are common to all requisitions.

Candidate form fields: Clients can configure up to one hundred (100) fields per candidate form. For example, if your organization has ten (10) forms defined, each of those 10 forms can have up to 100 fields configured for display on the mobile device.

Benefits

Enabling form approvals for mobile devices will increase efficiencies and decrease approval cycle times by allowing processes to continue even when approvers are away from the office.

Costs

There is no additional cost associated with this feature.

Availability

Release 11

Visible Changes

There are no visible changes associated with this project.

Limitations and Known Interactions

Users must enable Javascript on their mobile devices so that the OK button works properly in the Confirmation page which displays after the user approves the req.

The field order differs for mobile devices. The display groups standard fields at the top, followed by custom fields underneath.

The View req link does not work for mobile devices. Users designated to receive notifications of approvals still receive the eLinked notification of approval e-mail.

To ensure the proper user experience, elinks should be sent to an inbox that uses a mobile device email client application such as Outlook or the Blackberry email client.

Some devices are not able to launch the html page from the e-mail. In this case, clients may wish to change their settings to send the link via an attachment. This change affects all eLinks.

The system's business rules for eLink expiration apply to eLinks accessed via mobile devices.

The system's eLink authentication rules work the same for Mobile device approvals.

Clients with Single Sign On (SSO) enabled cannot use mobile approvals.

Clients who use only elink authentication and not full SSO can use mobile approvals without issue.

Mobile device users cannot edit form fields from their mobile devices.

Mobile devices users cannot use the mobile device to re-route approvals.

Rules for Form Fields on Mobile Devices

If the Req decline client setting is turned on, and a req is declined, addendum forms which typically accompany req declines are not available to mobile approvals. For forms declined through a mobile approval, there is no associated addendum form.

The "Decision reason" text field, which is a required field associated with candidate form approvals, can be included as a field for Mobile approvals. The default text for this field is: "Responded via Mobile Device." Mobile device users can override the default text and add their own reason.

The user privileges associated with req approvals are maintained.

Forms are displayed in the user's locale, if the users locale is not available the form displays in the clients base language.

Overview of Implementation

Kenexa personnel must enable, at a minimum, the client setting Mobile device approvals. Clients may also configure the Mobile Device Display ELink Logo setting if desired.

Certified Workbench Users must configure standard and custom req fields and candidate form fields for display on web-enabled mobile devices.

The major configuration steps for this feature are:

1. Kenexa personnel: Enable the client settings.
2. Kenexa personnel or Certified Workbench Users (Tiers 2 and 3 only): Define Standard req fields for display on mobile devices. See the Workbench 11 Release Notes or the Workbench 11 Manual (available April 6, 2008) for more information.

3. Kenexa personnel or Certified Workbench Users (Tiers 2 and 3 only): Define Custom req fields for display on mobile devices. See the Workbench 11 Release Notes or the Workbench 11 Manual (available April 6, 2008) for more information.
4. Kenexa personnel or Certified Workbench Users (Tiers 2 and 3 only): Define Candidate form fields for display on mobile devices. See the Workbench 11 Release Notes or the Workbench 11 Manual (available April 6, 2008) for more information.
5. KRB Users: Verify configured display in a mobile device.

KRB User Experience

When using the new mobile device features, user will see a screen similar to the one depicted in the screen capture.

Forms are displayed based on how the user accesses them, either through a standard PC interface or through a mobile device.

If the user accesses the form through a standard PC, the full form displays with full functionality. If the user accesses the form through a mobile device, the form displays the fields defined for mobile devices.

From their mobile devices, users can:

- View req forms for approval
- Take approve actions on req forms
- Take decline actions (if the “Req decline” client setting is turned on)
- View candidate forms for approval
- Take approve actions on candidate forms

