



# Kenexa 2x BrassRing<sup>®</sup>

Release 13.3

## Product Update Guide with Configuration

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# Agency Manager - Candidate Stacking Field

Agency Manager can now be configured to use the Candidate stacking field and related Candidate stacking logic schemas that were previously available only for Talent Gateways. This allows clients to use fields such as a passport number in candidate duplicate processing.

<b>Product</b> LDP 166 Release 13.3	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Agency Manager
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.	

## Feature Description

Agency Manager can now be configured to use the Candidate stacking field and related Candidate stacking logic schemas. This allows clients to use fields such as a passport number or SSN in candidate duplicate processing for Agency Managers as well as Talent Gateways.

When the Candidate stacking field is used for an Agency Manager, the AM's contact information tab and the Update candidate information screen both display the new field. The label name of the field can be customized.

### Agency Manager – Contact information

The screenshot shows the 'Verify candidate submission' screen in the Agency Manager interface. The 'Contact information' section contains the following fields:

- \*First name: Andrew
- Middle name: [Empty]
- \*Last name: Testcase
- Address line 1: 1234 East Street
- Address line 2: Bonstow, MA
- Country: United States
- City: [Empty]
- State/Region/Province: Select region
- Zip/Postal code: 01744
- E-mail: [Empty]
- \*Home phone: 781 555 0987
- Work phone: [Empty]
- Other phone (i.e. Mobile): [Empty]
- Fax: [Empty]
- Web address: [Empty]
- \*Candidate stacking field (label can be customized): [Empty]

The 'Work experience' section contains a table with the following data:

Position or job title	Organization name	Responsibilities	Skills	Start year	End year	Most recent
ASSISTANT MANAGER	PAPA JOHN'S PIZZA			2004	2012	<input type="radio"/>
ASSISTANT MANAGER	VOCELLI PIZZA			2003	2004	<input type="radio"/>

An 'Add work experience' button is located below the table. The 'Education' section is partially visible at the bottom.

## Agency Manager – Update candidate information

Welcome | Search jobs & submit candidates | **Active candidates** | Submissions in progress | Rejected submissions | Help | Logout

← Back to Active candidates Print

**Update candidate information:**

**Contact information**

\*First name   
Middle name   
\*Last name   
Address line 1   
Address line 2   
Country   
City   
State, Region, Province   
Zip/postal code   
E-mail address   
\*Home phone   
Work phone   
Other phone (i.e. mobile)   
Fax   
Web address   
**Candidate stacking field (label can be customized)**

**Disclaimer:** By submitting your information, you are indicating your consent to our privacy policy.

## How Do Clients Get this Feature?

The existing client setting **Enable candidate stacking field** must be enabled to use the Candidate stacking field for AMs. The new settings will be available in Add, Edit and Save as new screens for configuration of the AM Candidate stacking field. Please contact your Kenexa Support Team for more information about enabling this feature.

# Kenexa Tasks

Using a configurable Candidate stacking field requires that the “Enable Candidate stacking field” client setting be enabled. When configured to display on an Agency Manager, the field appears on the contact information tab (below the 'Web address' field). You can configure the stacking selection to display as optional or required, and to be encrypted, as well as hidden by user type or UI locale.

To configure Candidate stacking field for Agency Managers:

1. Set “Enable Candidate stacking field” client setting to **Yes**.
2. Set Candidate stacking field attributes (**Tools > Settings > Fields > Candidate profile fields**).
3. Set the stacking logic for the AM (**Tools > Agency Managers > Add new/ Save as new/ Edit Agency Manager > Stacking logic** tab).

## Workbench

### Set Candidate Field Attributes or Customize Candidate Stacking Field Label

#### Tools > Settings > Fields > Candidate profile fields

Text was updated on the **Candidate stacking field** page to reflect the inclusion of the field’s use for Agency Managers (in addition to Talent Gateways).

Set the attributes for the Candidate stacking field, using the information below.

Attribute	Description
Field label	Translate or customize the field label

Attribute	Description
Type	Select from: Numeric, SSN, and Text.
Data length	This is a single-select field with numeric options 5,through 15. The default value is 6. If Type = SSN then <b>Data length</b> is set to 11.
Data validation error message	Supply text to be presented if the field is required and blank, or if the data entered does not meet field data validation rules
Encrypted	The options are Yes and No (the default). If there are transactional data associated with the field OR if the candidate stacking field is being used as an Autofill source, the field is disabled and grayed out.
Hide in 2xB for these user types	Hide for selected client user types
Hide in 2xB for these UI locales	Hide for selected client-purchased recruiter locales

### Set Stacking Logic

Set the stacking logic for the desired AMs.

**Tools > Agency Managers > Add new/ Save as new/ Edit Agency Manager >Stacking logic tab.**

The screenshot shows the 'Edit Agency Manager' interface with the 'Stacking logic' tab selected. On the left, under 'Duplicate stacking logic', a list of logic options is shown, with '16SL: candidate stacking field', '17SL: candidate stacking field AND first name', and '18SL: candidate stacking field AND first name AND last name' highlighted in a red box. On the right, the 'Required contact fields' table is displayed with the following columns: Field name, Display, and Required field. The 'Candidate stacking field' row is also highlighted in a red box, with its 'Display' and 'Required field' checkboxes checked.

Field name	Display	Required field
First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Middle Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last name pronunciation key	<input type="checkbox"/>	<input type="checkbox"/>
First name pronunciation key	<input type="checkbox"/>	<input type="checkbox"/>
Contact e-mail address	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Address line 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Address line 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>
City	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Zip/Postal code	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Country	<input checked="" type="checkbox"/>	<input type="checkbox"/>
State/Region/Province	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Home phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Work phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Other phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Fax	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Web address	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Candidate stacking field	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Select the desired stacking logic at left. When you choose 16SL, 17SL, or 18SL as the logic, “Display” and “Required” are automatically checked for “Candidate stacking field” (and will be grayed out so that they cannot be unselected).

- The standard 15 contact fields (First name, Middle name, Last name, Contact e-mail, Address line 1, Address line 2, City, Zip/Postal code, Country, State/Region/Province, Home phone, Work phone, Other phone, Fax, Web address) are automatically checked (these are not currently configurable and are always displayed).
- If the Agency Manager locale is “Japanese – Japan,” the Last name pronunciation key and First name pronunciation key are checked and disabled. For all other locales, the last name pronunciation key and First name pronunciation key are unchecked and disabled.

# Agency Manager – Selecting Agency Response Form Questions

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Text, Text Area, and Numeric field types from the “Agency Response” candidate form in Agency Manager are now available for selection when questions are added to the form.

<b>Product</b> RDP 673 Release 13.3	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Agency Manager
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in internal <i>Visible Changes</i> document.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic – see details below.	

## Feature Description

**Background:** Currently in the Agency portal, users can select from candidate forms only the active fields that have configured options. Form fields without options configured are not selectable. For the custom “Agency Response” candidate form, clients wanted to be able to select additional field types.

With this feature, Text, Text Area and Numeric field types from the “Agency Response” candidate form in Agency Manager are now available for selection when questions are added to the form in Workbench. Users adding questions to the form can now select those field types in addition to fields that have options (single-select, multi-select, radio button, and so forth).

## Limitations and Known Issues

These field types are available only from (and for) the custom “Agency Response” candidate form.

## How Do Clients Get this Feature?

New field types are available automatically for sites using Agency Manager. Please contact your Kenexa Support Team for more information about enabling this feature.

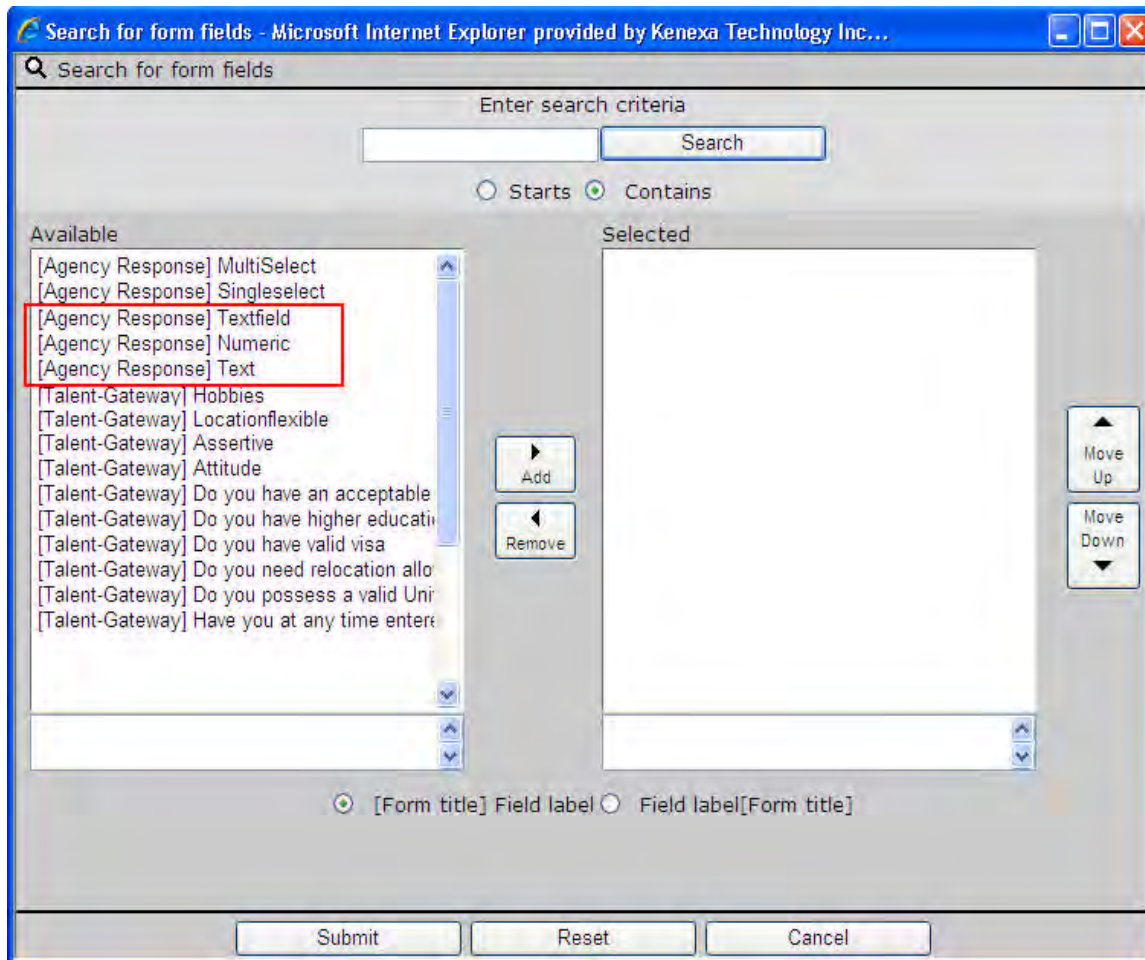


# Kenexa Tasks

## Workbench

Additional field types are now selectable for the “Agency Response” form questions.

**Tools > Agency Managers > Add/Edit [selected AM] > Form fields > Select form fields**



### Business Rules:

- Text, Text Area, and Numeric type fields are now available in Agency Manager to select **ONLY** from custom form “Agency Response” candidate form, as well as fields that have options configured on this candidate form.
- New fields are available **ONLY** if the candidate “Form name” (Database title) is “Agency Response Form.”
- All existing business rules for “Candidate forms” and “Agency Managers” remain the same.
- Current feature remains same, that is:
  - Form fields for which options are configured are available to select for an Agency Manager.
  - Form fields for which options are not configured are not available to select for an Agency Manager.
  - Form fields are available in Agency Manager **ONLY** if form is Multiple per candidate or Multiple per candidate/req combination.

# Candidate Forms – Autofill Fields as Autofill Source

For increased flexibility in configuration of candidate form fields, you can now choose an Autofill type field as a source for another autofill field. This allows a value to be carried through successive candidate forms throughout the hiring process.

<b>Product</b> LDP 137 Release 13.3	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Specific conditions required – see details below.	

## Feature Description

For increased flexibility in configuration of candidate form fields, you can now choose an Autofill type field as a source for another autofill field, subject to certain rules. This allows for a scenario where:

1. Field inherits a value
2. Value is then changed
3. Changed value is carried through to successive candidate forms.

The list of values available when configuring the the Autofill field automatically includes all Autofill type fields valid as a source for the attribute being configured.

## 2xB User Experience

Users should not see any obvious change in behavior, although having more fields autofilled may provide more convenience and consistency. For Autofill type fields that are filled from other Autofill fields, user type privileges for the current field dictate what field data users can view or edit.

Autofill fields inherit *configuration* attributes from their ultimate source/grandparent, and inherit *data* from their immediate source/parent.

## Communications Templates

Blurb templates present the correct list of options to the user selecting *conditional* criteria. If an Autofill original source is a single select or radio button field, the list of options is obtained from the field's "original source" rather than the "immediate source."

Letter templates also accommodate the population of Autofill fields from other Autofill fields.

## Data Insight Tool

Data Insight presents the correct list of options to the user selecting *reporting* criteria. If an Autofill original source is a single select or radio button field, the list of options is obtained from the field's "original source" rather than the "immediate source."

Autofill fields with options can be used as filters in Data Insight.

## Limitations and Known Issues

Autofill source can be only "one hop" from the autofill field it is filling. Thus it cannot accommodate a scenario where:

1. Req form's **Salary range** field to autofill **Offer Drafting** form
2. Team to approve **Offer Drafting** form
3. **Offer Drafting** form's **Salary range** to autofill **Offer Letter** form (to be used to create the Offer PDF)
4. **Offer Letter** form's Salary range to autofill the **New Hire** form.

This cannot be done because the New Hire form's autofilled Salary range source would be the Offer *Letter* form's autofilled Salary range, whose source is Offer Drafting form's autofilled Salary range. This scenario would be "2 autofill hops" and is not allowed.

## How Do Clients Get this Feature?

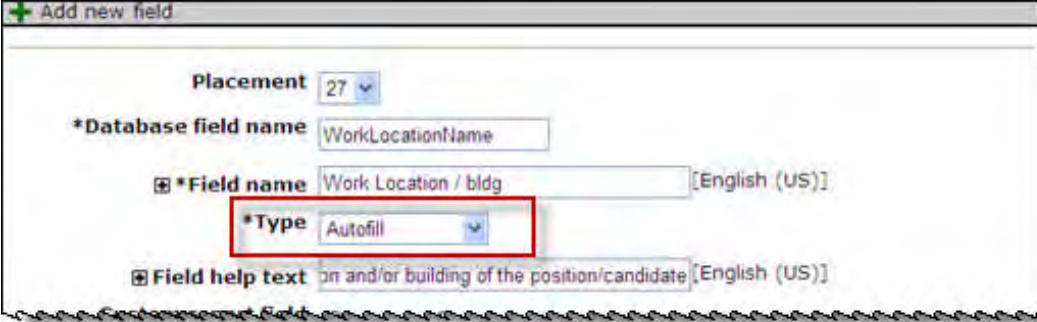
Autofill type fields are available automatically for configuration as source for another autofill field. Please contact your Kenexa Support Team or Certified Workbench User for more information.

### Workbench Self-Service Certified Users

When you administer the use of a candidate form Autofill field as the source for another Autofill field in Workbench:

- "[Autofill from](#)" options list now automatically includes Autofill fields that have a source with a field type *other than Autofill*. That is, the immediate source of the autofill field can be another autofill field, but the source of that field (source once-removed) must be a different type.
- "[Question branching](#)" options list now includes any Autofill fields that themselves have an Autofill source *whose original source is an optionable field*.

**Tools > Forms > Candidate forms > Administer form fields > Edit / Add field > Field type = auto-fill**



The screenshot shows the 'Add new field' configuration interface. It includes the following fields:

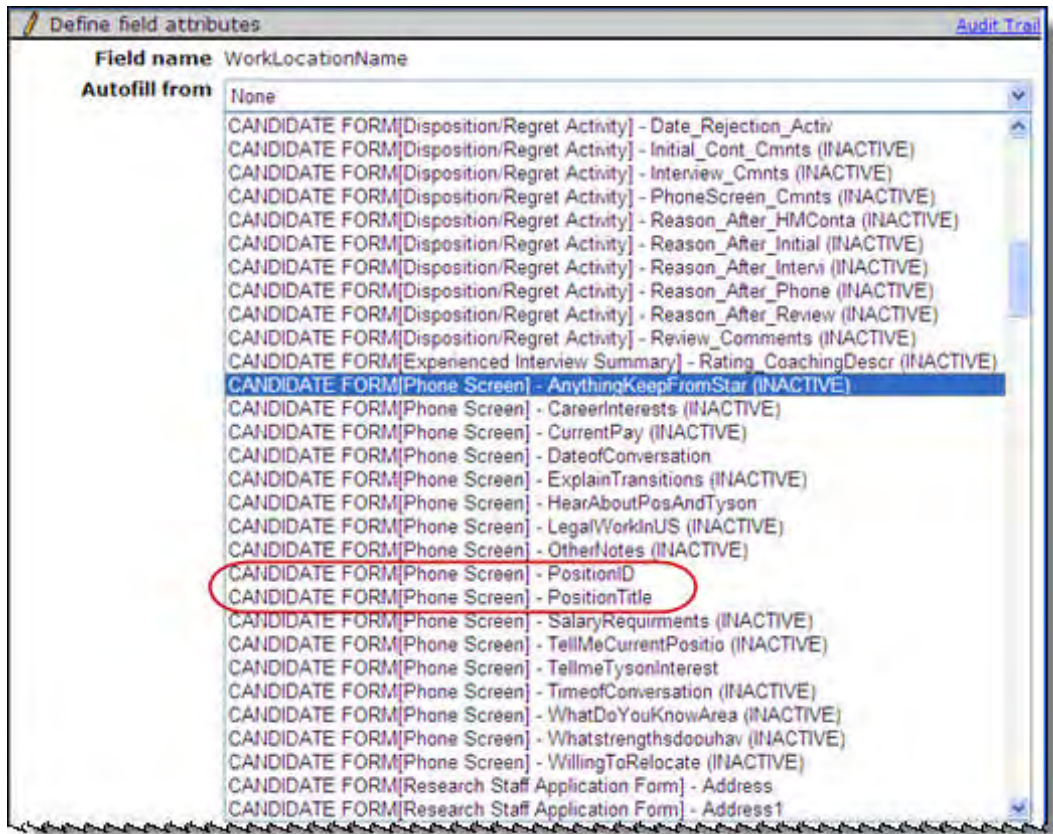
- Placement:** 27
- \*Database field name:** WorkLocationName
- \*Field name:** Work Location / bldg [English (US)]
- \*Type:** Autofill (highlighted with a red box)
- Field help text:** on and/or building of the position/candidate [English (US)]

### Autofill from Attribute

For Autofill from, the immediate source of an autofill field can be another autofill field, but the source of that field cannot be autofill; it must be a different type.

Any autofill fields that you can use as the Autofill from source now appear on the **Define field attributes** screen (second screen when adding/editing a field) when you add or edit a form field, such as the PositionID and PositionTitle fields that appear below.

**Edit/Define field attribute Autofill from**



The field type attributes are inherited from the original Autofill source, as described in the following table.

Field type	Field Attributes that will be from “original” source of Autofill
Autofill	<ul style="list-style-type: none"> <li>• Purge field data via partial purge?   Radio (Yes/No)</li> <li>• Candidate field association                             <ul style="list-style-type: none"> <li>- If the Parent and/or child fields are enabled or disabled (will not inherit if the setting is checked or not.)</li> </ul> </li> </ul>
Checkbox	N/A: unable (at this time) to have a Checkbox field type as an autofill source
Date	<ul style="list-style-type: none"> <li>• Up years (from current year)   Text</li> <li>• Down years (from current year)   Text</li> <li>• Display order of years   Radio (ascending/descending)</li> <li>• Default Today’s Date   Radio (Yes/No)</li> <li>• Purge field data via partial purge?   Radio (Yes/No)</li> <li>• Candidate field association                             <ul style="list-style-type: none"> <li>- If the Parent and/or child fields are enabled or disabled (will not inherit if the setting is checked or not.)</li> </ul> </li> </ul>
Email address	<ul style="list-style-type: none"> <li>• Field length   Text</li> <li>• Purge field data via partial purge?   Radio (Yes/No)</li> <li>• Candidate field association                             <ul style="list-style-type: none"> <li>- If the Parent and/or child fields are enabled or disabled (will not inherit if the setting is checked or not.)</li> </ul> </li> </ul>

Grid	N/A: Grid fields are only on Talent Gateway forms and currently multiple candidate forms cannot be used as Autofill sources
Label	N/A: label fields have no data to Autofill
Multi-select	N/A: unable (at this time) to have a Multi-select as an autofill source
Numeric	<ul style="list-style-type: none"> <li>• Min   Text</li> <li>• Max   Text</li> <li>• Purge field data via partial purge?   Radio (Yes/No)</li> <li>• Candidate field association <ul style="list-style-type: none"> <li>- If the Parent and/or child fields are enabled or disabled (will not inherit if the setting is checked or not.)</li> </ul> </li> </ul>
Radio button	<ul style="list-style-type: none"> <li>• Purge field data via partial purge?   Radio (Yes/No)</li> <li>• Options Source <ul style="list-style-type: none"> <li>- If autofill source field Option source = Maintain custom list, then Autofill will utilize the Autofill source field's list of options.</li> </ul> </li> <li>• If Autofill source field Option source = pull options from existing list, then Autofill will utilize the option list of the selected field.</li> <li>• Candidate field association <ul style="list-style-type: none"> <li>- If the Parent and/or child fields are enabled or disabled (will not inherit if the setting is checked or not.)</li> </ul> </li> </ul>
Single select	<ul style="list-style-type: none"> <li>• Field length   Text</li> <li>• Purge field data via partial purge?   Radio (Yes/No)</li> <li>• Options Source <ul style="list-style-type: none"> <li>- If autofill source field Option source = Maintain custom list, then Autofill will utilize the Autofill source field's list of options.</li> </ul> </li> <li>• If Autofill source field Option source = pull options from existing list, then Autofill will utilize the option list of the selected field.</li> <li>• Candidate field association <ul style="list-style-type: none"> <li>- If the Parent and/or child fields are enabled or disabled (will not inherit if the setting is checked or not.)</li> </ul> </li> </ul>
SSN	<ul style="list-style-type: none"> <li>• Purge field data via partial purge?   Radio (Yes/No)</li> <li>• Candidate field association <ul style="list-style-type: none"> <li>- If the Parent and/or child fields are enabled or disabled (will not inherit if the setting is checked or not.)</li> </ul> </li> </ul>
Text	<ul style="list-style-type: none"> <li>• Field length   Text</li> <li>• Input validation   Single Select</li> <li>• Purge field data via partial purge?   Radio (Yes/No)</li> <li>• Candidate field association <ul style="list-style-type: none"> <li>- If the Parent and/or child fields are enabled or disabled (will not inherit if the setting is checked or not.)</li> </ul> </li> </ul>

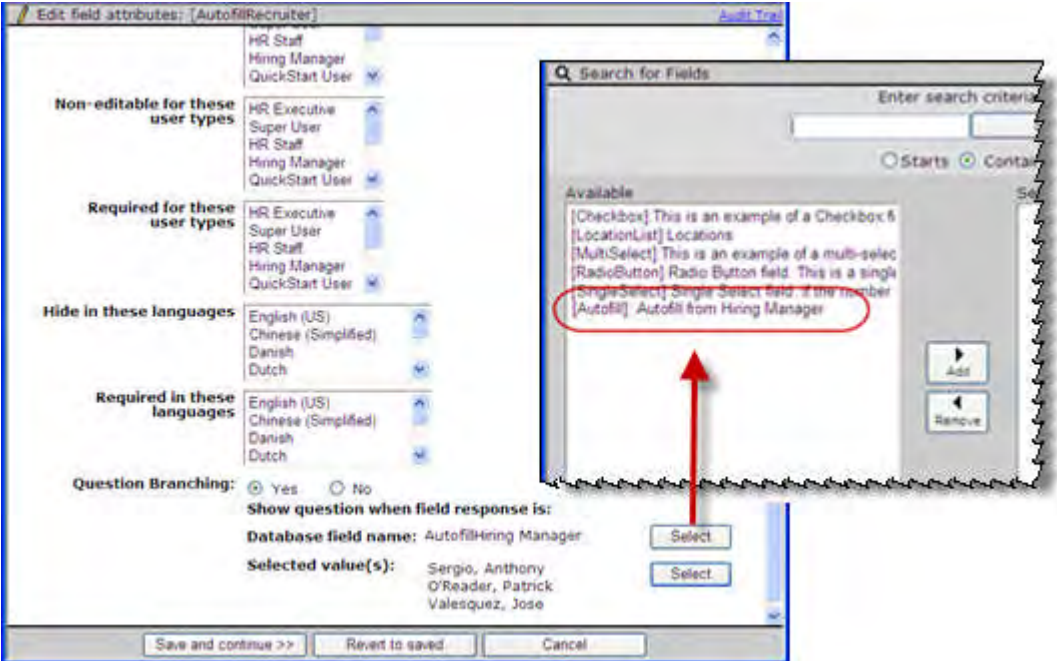
Text area	<ul style="list-style-type: none"> <li>• Field length   Text</li> <li>• Integrated URL   Radio (Yes/No)</li> <li>• Purge field data via partial purge?   Radio (Yes/No)</li> <li>• Candidate field association <ul style="list-style-type: none"> <li>- If the Parent and/or child fields are enabled or disabled (will not inherit if the setting is checked or not.)</li> </ul> </li> </ul>
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**Question Branching Attribute**

Fields that themselves have an autofill source can be used as “parent” fields for question branching when the *original source is an optional field*.

Any autofill fields that you can use as the parent field for Question branching now appear on the **Search for Fields** screen (pop-up screen when selecting the parent question) when you add or edit a form field.

**Edit/Define field attribute Question Branching**



# Kenexa Tasks

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Internal-facing product areas have also been updated to support the Autofill type fields where the source is another autofill field.

## RAM

RAM can autofill from an autofill field. The following areas (all the areas where a field is selected) of Rules Automation Manager support the Autofill type fields where the source is another autofill field, looking to the “original Autofill source” for configuration information such as field type and option validation.

- In Conditions tab
- In conditions in Copy/Move action
- Copy/Move candidate forms
- Populate Field values.

## XML Form Imports and Exports

For XML form imports for integrations, import logic supports the cases where an Autofill original source is a single select or radio button field. The list of options is obtained from the field’s “original source” rather than the “immediate source, so that the correct list is available for validating the imported values into Autofill fields.

For candidate export with forms changes, the export accommodates Autofill fields with an Autofill source by looking to the “original Autofill source” for configuration information where necessary.

# Candidate Forms – Automatic Calculations in Fields

This feature provides automatic calculation of values in candidate forms using preconfigured formulae based on the Candidate Field Associations in the 2xB system.

<b>Product</b>	<input checked="" type="checkbox"/> 2xBrassRing
<b>LDP 162 Release 13.3</b>	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.

## Feature Description

Calculations of numeric values can now be automatically performed and displayed in candidate form fields. Calculations are based on formulae configured for text or numeric child fields of a candidate form, and the field association is imported using Workbench Import process.

In 2xB, when a user selects a value in the parent field of the candidate form, the values for the corresponding child fields are displayed automatically. They are calculated based on the formulae configured for the child fields in association with the option selected in the parent field.

When calculated values are displayed, candidate forms with calculated fields also have a new **Recalculate** button. Users click this button to recalculate the child values when changes are made to the values in any of the child fields or any other form fields that are involved in calculating the values of the child fields.

## Calculated Fields

For example, calculated fields are useful in deriving the components of a candidate's salary, such as Base Salary, House Rent Allowance, Travel Allowance, etc., by providing the candidate's "Total Cost to Company" and the "Salary Band" as inputs. Different formulae to calculate each component based on the different parent selections (salary bands) are inserted in the child field with appropriate syntax. The association information between the parent fields and child fields of the form is imported to Workbench. User provides the Cost to company of a candidate on the form and selects a calculation basis in the parent field. Based on these inputs and the formulae that are imported for the child fields, the rest of the components are automatically calculated and displayed in the child fields.

Each dropdown value for the parent field has a different import profile that associates different mathematical formulae to the associated child fields. The system automatically populates the associated child fields with values per the formula attached to that specific child field in the backend.



Offer Form For Testing1      Microsoft Internet Explorer provided by Kenexa Technology Inc..

City

State

Postal Code

Title

Location

CTC

Salary Calculation Type  [Selection details](#)

Basic  ✓

HRA  ✓

Medical Allowance  ✓

LTA  ✓


PF Employer Contribution  ✓

Adjustments  ✓

Relocation  ✗

\* = required field

A check mark (✓) displays beside each child field that successfully displays a calculated value. Similarly, a red "X" (✗) displays beside each child field that fails validation or that displays a blank value due to a failed calculation. Upon mouse-hover, a tool tip displays a description of the error that occurred of the error indicator.



The system calculates a value by applying the BODMAS (parenthesis or brackets, exponents and roots, division and multiplication, addition and subtraction) rule to determine the order of operations in the assigned formula to the fields. If a formula is preceded by one operator and followed by another, the left-most operator on the BODMAS list is applied first.

Users can make changes to the value in a child field after the calculation, or manually provide a value if the child field is left blank due to invalid formula or a failed validation.

## 2x BrassRing Users

2xB users can now get calculations done automatically and the values displayed within the candidate forms instead of manually performing the calculations and inserting them into the forms. The following are the key points that a user should observe while working with those fields.

- The fields with calculations are displayed blank along with a cross mark next to them in the following scenarios:
  - Value in the candidate form field that is used in the formula for the child fields is blank.
  - Candidate-form field or a calculation field that is used in the formula for another calculation field(s) is selected to be hidden due to question branching/User type/language in Workbench.
  - Candidate form field that is used in the formula for the child fields is either inactivated or deleted.
  - Value of a candidate form field that is used in the formula for a child field has text string
  - System cannot render a value based on the formula imported for a child field.
  - Candidate form field or calculation field used in the formula for another calculation field is placed after this field on the candidate form.
- When a blank field or a field with a cross mark is displayed, users can enter values manually into the form fields. However, if any of those form fields is selected as non-editable for that user's user type, then the user cannot change the value manually.
- If the value of a form field was not populated due to incorrect formula or failed calculation, and if any other child field is calculated based on that value, then the other form field will also be displayed as blank with a cross mark.
- If the value in the candidate form field that is used in the formula for calculating any of the form fields is changed after the values in the form fields are calculated and displayed using one of the options in the parent field, then the change will not impact the values in the form fields.
- In order to calculate the values in the child fields based on the new value in the candidate form field, the user needs to either reselect the parent field option or click the new '[Recalculate](#)' button on the candidate form.
- If the user manually changes the value in the candidate form field that is used in the formula and does not recalculate the values, a warning message is displayed upon clicking "Save" or "Save and send for approval" on the candidate form informing that changes have been made and asking for confirmation to save without recalculations.

## The Recalculate Button

- The 'Recalculate' button is displayed on a candidate-form with calculation fields in the following scenarios:
  - If the parent field is an auto-fill field from another candidate form field and the value is pre-populated during the initial page load, then the 'Recalculate' button will be added to the form on the initial page load.
  - If a user adds a form and selects the parent option and saves the form as draft, then the 'Recalculate' button is displayed when the user tries to add this form to a candidate.
  - When a user tries to edit a form that is saved after selecting an option in the parent field, then the 'Recalculate' button is displayed.
- If a parent field has two options, one with calculation fields and other without calculations fields, then the 'Recalculate' button is displayed only when the option with calculation fields is selected and will not be displayed when the option without calculation fields is selected.

## Limitations and Known Issues

- Data base Field name or syntax of the formulae is not validated by the system during import.

- This feature is not implemented in Talent Gateways. Consequently, when calculated fields or forms containing calculated fields are displayed in Talent Gateways, the selection of an option in a parent field will result in displaying the formulae as text instead of values in the child fields.
- Formulae with recursive comparative operators are not supported. Example: #Max [(Min (Max (<value>)))]#

## How Do Clients Get this Feature?

For each form that requires calculated fields, a CFA import needs to be performed. Please contact your Kenexa Support Team for more information about this Import process.

# Kenexa Tasks

## Workbench

When calculated fields are required on a candidate form, a Field Association (Candidate forms and Document Subsidiary forms) Import must be performed in Workbench.

	A	B	C	D	E	F	G	H	I	J
	Update	Parent Option	Parent Option Description (English (US))	Parent Option Sort Order	Parent Option Status	Child Type	Child Question	Child Option	Default Selection	Child Text (English (US))
1	Action	Code	(English (US))	Order	Status	Child Type	Child Question	Option	n	Child Text (English (US))
2	update	Band 1	Salary banding	1	Active	Candidate	Basic		No	#[CTC@*20%]#
3	update	Band 1	Salary banding	1	Active	Candidate	HRA		No	#[CTC@*20/100]#
4	update	Band 1	Salary banding	1	Active	Candidate	Medical		No	#[CTC@*20/100]#
5	update	Band 1	Salary banding	1	Active	Candidate	LTA		No	#[CTC@*20%]#
6	update	Band 1	Salary banding	1	Active	Candidate	PF Employer Contribution		No	#[CTC@*15%]#
7	update	Band 1	Salary banding	1	Active	Candidate	Adjustments		No	#[CTC@-(@Basic@+@HRA@+@Medical@+@LTA@+@PFEmployerContribution@)]#

### Business Rules to follow while preparing Formulae for calculated fields CFA

- Assigning formulae is permitted only for numeric or text type candidate form fields.
- In the CFA import file, a formula needs to be assigned in the Child Text column for the Child field in all the client-purchased locales in the following format: **#[<formula>]#**.
- Either numeric values or database field names can be used to construct formulae.
- The database field name needs to be enclosed in @ symbols. For example: **#[@DBFieldName1@\*10/100]#**.
- These arithmetical operators are permitted: “+”, “-”, “\*”, “/”, and “%” in the formulae.
- These comparative operators are also permitted: **Min**, **Max** and **Between**.
- Open parenthesis “(“ and closed parenthesis “)” are permitted to specify the order of operation.
- Min, Max and Between operators are used in a formula to validate the value entered in a child field.
- The Min Operator checks if the child field value is greater than or equal to the value given in the formula.
  - The syntax for a formula using the “Min” operator needs to be as follows: **#[Min(@DBFieldName1@)]#** or **#[Min(<value>)]#**
- The Max Operator checks if the child field value is less than or equal to the value given in the formula.
  - The syntax for a formula using the “Max” operator needs to be as follows: **#[Max(@DBFieldName1@)]#** or **#[Max(<value>)]#**
- The Between Operator checks if the child field value falls within the range of values provided in the formula, inclusive of the lower and upper limit values.
  - The syntax for a formula using the “Between” operator needs to be as follows: **#[Between(@DBFieldName1@, @DBFieldName2@)]#** or **#[Between(<value1>, <value2>)]#**.
- These operators can also be used to calculate as well as restrict the output value in a child field at the same time.
  - The syntax for such formulae needs to be as follows: **#[Max(@DBFieldName@):1000+1400-1250]#**
- Candidate form field against which the child field is validated needs to be present on the candidate form in an active status; else, the validation will be unsuccessful.
- The database field names of candidate form fields of type numeric or text only need to be used in the formula and they should be present on the candidate form in an active status in order to calculate the value.

- Formulae involving a candidate form field must include the Database field name for the candidate form field to allow the formula to work without any errors. Multiple candidate form fields can be used in a single formula. For example: `#[@DBFieldName1@+@DBFieldName2*@DBFieldName3@]#`
- Candidate form fields used in the formula of a calculation field or calculation field used in the formula for another calculation field should be placed before this field in order to calculate and render the values successfully. For example, if the field name 'Basic' is used in the formula to calculate the value for the field 'HRA' on the 'Offer Form', then the field 'Basic' should be placed before the field 'HRA' on the Offer Form.
- The values in the child fields of type numeric are rounded to the nearest integer and the values in the child fields of type text will be rounded to two decimal points. Clients who require decimal values in the form fields need to configure text type fields for calculated fields.

# Candidate Forms – Enhancements to Multiple Forms List

The Multiple Forms List screen, which displays different candidate forms, is enhanced to make form search and actions easy and more intuitive.

<b>Product</b>	<input checked="" type="checkbox"/> 2x BrassRing
<b>LDP 130 Release 13.2</b>	
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document sent for each release build.
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic – see details below.

## Feature Description

Prior to this project, the Multiple Forms list was sorted based on the “Last action date” column. There were no other sort options. Users needed to scroll through the list of forms to find a required form. Locating a specific form was difficult in cases where the number of forms is high.

Last action date	Form ID	Form name	Last edited by	Date added	Added by	Form approval	View form	Edit form	eLink form	Delete form
02-Jul-2012	63302	<a href="#">KAS Assessment-282BR:Payable Coord</a>	pevan.atun@kenexa.com	28-Jun-2012	Submission, System					
28-Jun-2012	63307	<a href="#">KAS Overall Result-282BR:Payable Coordinator</a>	Submission, System	28-Jun-2012	Submission, System					
28-Jun-2012	63308	<a href="#">KAS Overall Result-281BR:Assistant</a>	Submission, System	28-Jun-2012	Submission, System					
28-Jun-2012	63309	<a href="#">KAS Overall Result-280BR:Asst to CEO</a>	Submission, System	28-Jun-2012	Submission, System					
28-Jun-2012	63306	<a href="#">KAS Overall Result-283BR:Payable Coord</a>	Submission, System	28-Jun-2012	Submission, System					
28-Jun-2012	63303	<a href="#">KAS Assessment-282BR:Payable Coordinator</a>	Submission, System	28-Jun-2012	Submission, System					
28-Jun-2012	63304	<a href="#">KAS Assessment-281BR:Assistant</a>	Submission, System	28-Jun-2012	Submission, System					
28-Jun-2012	63305	<a href="#">KAS Assessment-280BR:Asst to CEO</a>	Submission, System	28-Jun-2012	Submission, System					
28-Jun-2012	63301	<a href="#">Talent-Gateway-look.submit.and.grab</a>	Submission, System	28-Jun-2012	Submission, System					
28-Jun-2012	63300	<a href="#">KAS Assessment-ACES Driver Selector-283BR:Payable Coord</a>	AVKD, Sivakumar	28-Jun-2012	AVKD, Sivakumar					
28-Jun-2012	63299	CFA_Calc	Submission, System	28-Jun-2012	Submission, System					
28-Jun-2012	63298	<a href="#">KAS Overall Result-282BR:Payable Coord</a>	Submission, System	28-Jun-2012	Submission, System					

With this feature, the Candidate Forms screen has a complete new look. Users can choose the way in which the forms list is presented using multiple options like:

- The number of forms that are displayed per page.
- The column on which the list is sorted.

## New Features

The following new features are added to this screen:

- [Pagination](#)
- [Sorting](#)
- [Filtering](#)
- [Quick Search based on text](#)
- [Auto complete Add Form/e-Link blank Form selection](#)
- [View multiple forms](#)

- [e-Link multiple forms](#)
- [Approve/Decline on behalf of approver from the listing page for Sequential approval](#)

## Pagination

The Multiple Forms List screen is now paginated. Pagination depends upon the number of forms a candidate record contains and the number of forms you want displayed on the screen (the default is 25 forms).

Multiple Forms List for: ramuk. antar [?Help](#)

Select form  Add Form eLink Blank Form

Show 10 forms Showing 1 to 10 of 16 forms Filter Search

Selected: 0 First Previous 1 2 Next Last

Actions	<input type="checkbox"/>	Last Edited Date	Form ID	Form Name	Last Edited By	Date Added	Added By	Form Approval	Edit	eLink	Del
<input type="checkbox"/>	<input type="checkbox"/>	24-Jan-2013	66419	<a href="#">KAS Overall Result - 318BR: Rama Bypassed Button1 job</a>		24-Jan-2013	Submission, System				
<input type="checkbox"/>	<input type="checkbox"/>	24-Jan-2013	66418	<a href="#">KAS Assessment - 318BR: Rama Bypassed Button1 job</a>		24-Jan-2013	Submission, System				
<input type="checkbox"/>	<input type="checkbox"/>	24-Jan-2013	66417	<a href="#">Offer Form - 318BR: Rama Bypassed Button1 job</a>		24-Jan-2013	Submission, System				
<input type="checkbox"/>	<input type="checkbox"/>	24-Jan-2013	66416	<a href="#">Talent-Gateway- Look.submit and grab</a>		24-Jan-2013	Submission, System				

## Sorting

Sort the list of forms based on any one of the columns that contain information like 'Last Edited Date', 'Form ID' etc. By default, the list is sorted based on Last Edited Date in descending order, displaying the last edited form first.

Multiple Forms List for: ramuk. antar [?Help](#)

Select form  Add Form eLink Blank Form

Show 25 forms Showing 1 to 16 of 16 forms Filter Search

Selected: 0 First Previous 1 Next Last

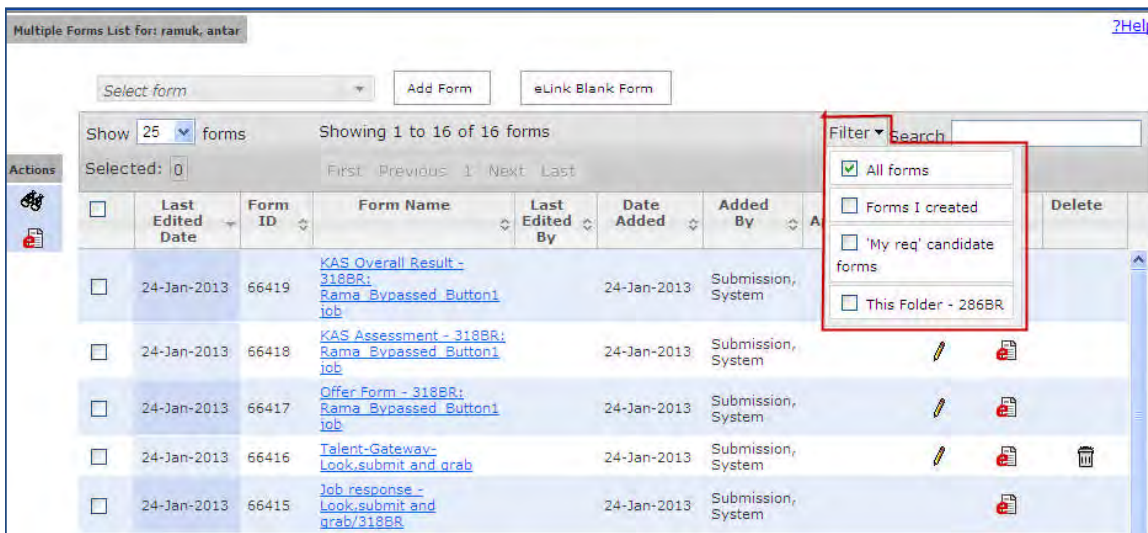
Actions	<input type="checkbox"/>	Last Edited Date	Form ID	Form Name	Last Edited By	Date Added	Added By	Form Approval	Edit	eLink	Delete
<input type="checkbox"/>	<input type="checkbox"/>	24-Jan-2013	66419	<a href="#">KAS Overall Result - 318BR: Rama Bypassed Button1 job</a>		24-Jan-2013	Submission, System				
<input type="checkbox"/>	<input type="checkbox"/>	24-Jan-2013	66418	<a href="#">KAS Assessment - 318BR: Rama Bypassed Button1 job</a>		24-Jan-2013	Submission, System				
<input type="checkbox"/>	<input type="checkbox"/>	24-Jan-2013	66417	<a href="#">Offer Form - 318BR: Rama Bypassed Button1 job</a>		24-Jan-2013	Submission, System				

## Filtering

Filter the list based on several criteria like form type, who has created the form, etc.

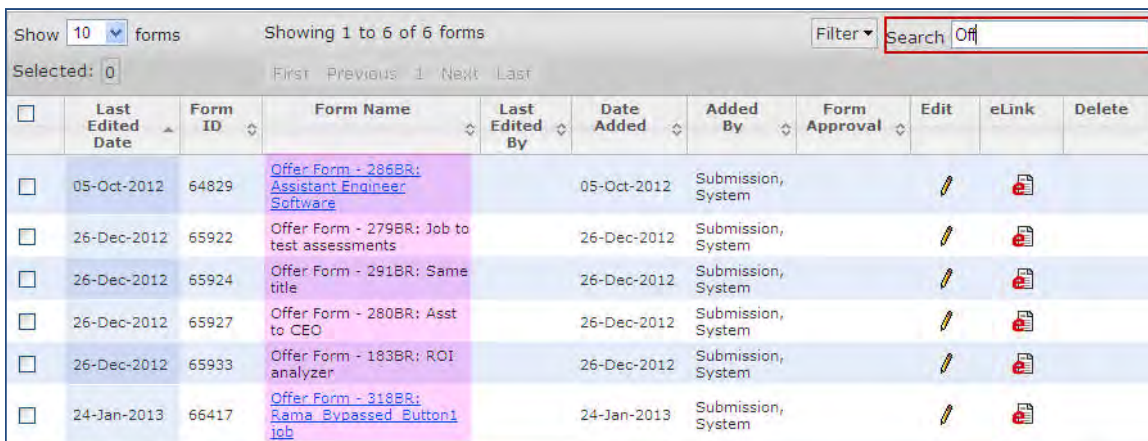
- **All forms** – shows all forms that the user has access to see (that are NOT secured via Secure Req or Restrict Talent Record functionalities)
- **Forms I created** – shows all forms that the *user* has *created*
- **'My req' candidate forms** – shows forms associated to a requisition that the user has a 'my req' relationship with (single / candidate / req and multiple / candidate / req)
- **This folder** – **<Auto req id>** - shows all forms associated with the req folder from which the form screen or Talent Record was launched

- If the forms screen or Talent Record was launched from a working folder or a candidate search, this filter is grey and disabled
  - Only single / candidate / req and multiple / candidate / req forms are displayed
  - Forms grid refreshes each time a new filter is selected, and the grid is sorted by current sort that the user has selected.
  - If all the filters of **Forms I created**, **'My req' candidate forms**, and **This folder - <autoreqid>** are unchecked, then **All forms** filter is automatically selected.
  - Multiple filters can be selected simultaneously
  - Combination of the filter results will be displayed.
- Example: if **Forms I created** and **This Folder – 286BR** filters are checked, then all forms associated with the req folder from which the form screen or Talent Record was launched AND all forms that the user created would be displayed.



### Quick Search based on Text

As you enter a text string into Search, the list of forms displays only those forms that have the text in their names. From the following figure, you can observe that when the user entered "Off" in Search, only those forms that have the string "Off" in their names are displayed in the list.

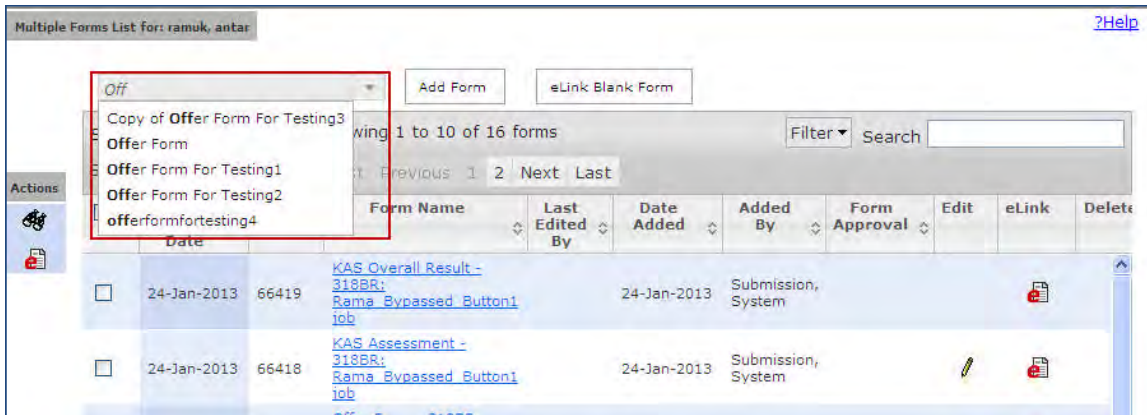



**Note:** Search returns only such forms that the user's user type has the privilege to Add/View/Modify.



## Auto complete Add Form/e-Link blank Form selection

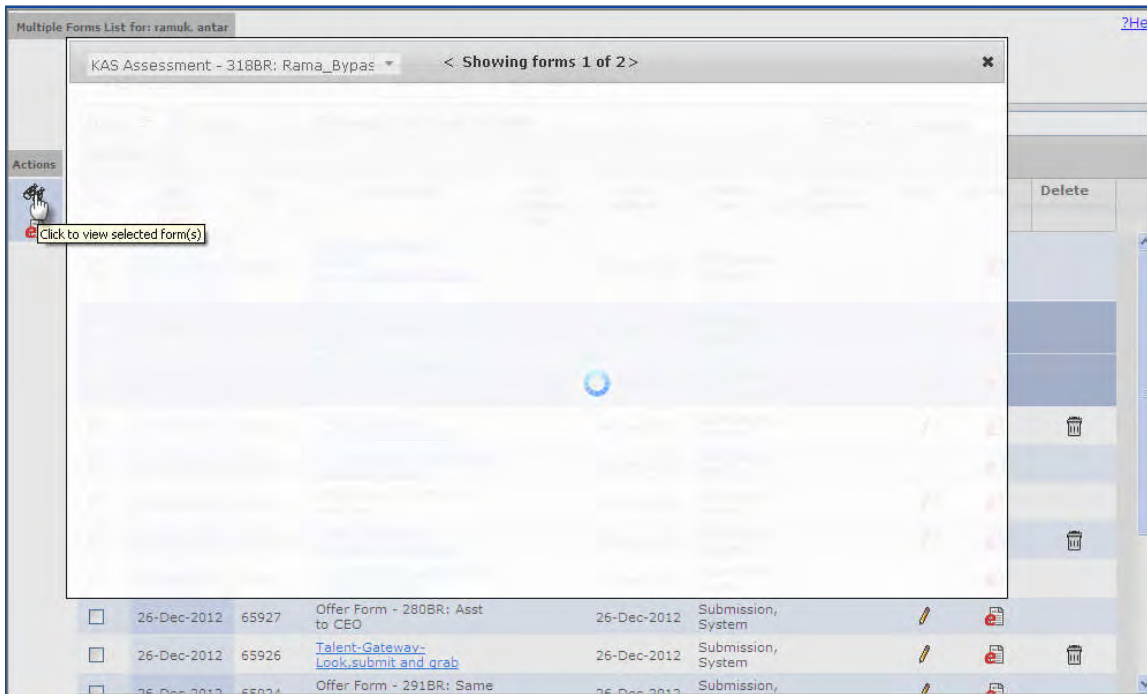
Start typing in the name of the form in the Select Form drop-down and form names that match the keyed in characters are presented as predictions. You can select the form of your choice by clicking the form name.



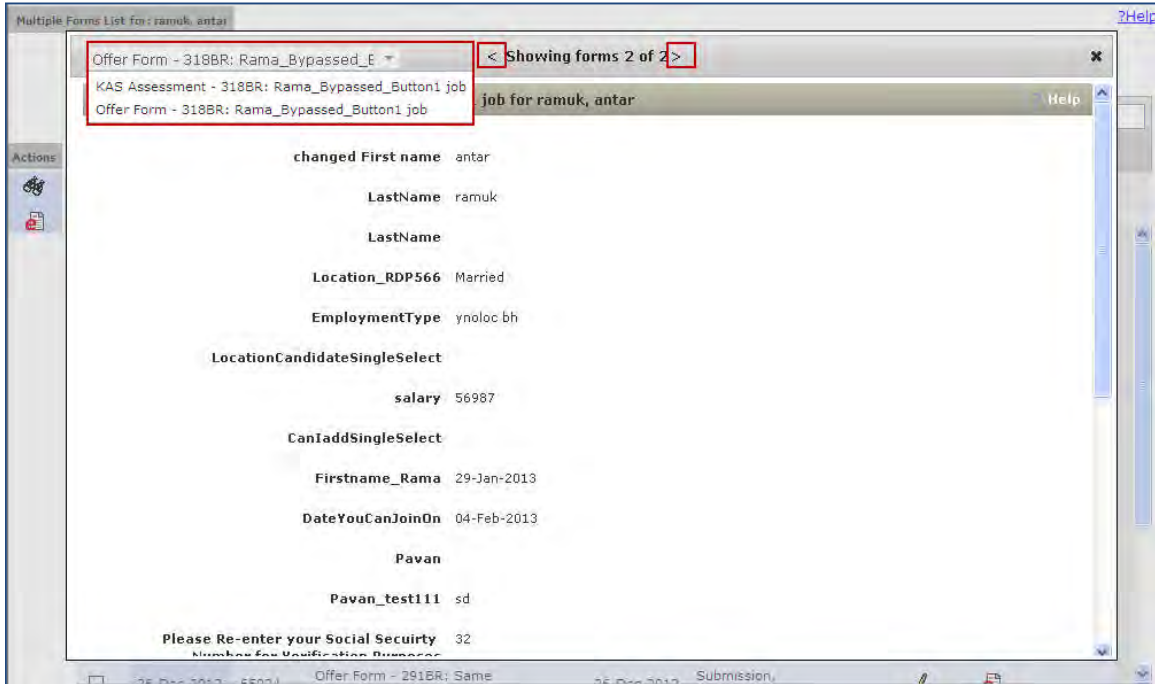
 **Note:** Forms drop down displays only such forms that the user's user type has the privilege to Add/View/Modify.

## View Multiple Forms

Select multiple forms using the check boxes and click **View** from the Actions panel. This opens a new pop-up within the Multiple forms screen.



You can then view each form you have selected either from the drop-down menu or by clicking the right/left pointers at the top of this pop-up window.



## e-Link Multiple Forms

Select any number of forms from the list using check boxes and click **e-Link** from the Actions panel to open a pop-up window for e-linking the forms.

Privileges to eLink with multiple forms selected:

- **View** is available if the user has VIEW privileges to ALL of the forms selected
- **Edit** is available if the user has EDIT/MODIFY privileges to ALL of the forms selected
- **Approve** is NOT available when multiple forms are selected.

## Approve/Decline on behalf of approver from the listing page for Sequential approval

If a form is pending approval, and you have appropriate privileges, you can approve or decline the form. Clicking the hyperlink opens a pop-up window with radio buttons to approve or to decline the form along with a text box for comments. After you approve or decline and add comments, click the 'Submit' button to complete the action.



**Note:** The forms list can be sorted based on the Form Approval column. However, search cannot be performed based on the form approval status (Pending, Approved, etc.).

## Limitations and Known Issues

In the Form Approval column, approval is allowed only when the approval routing is sequential. If it is rule based or parallel, form approval by the user is not allowed in this window.

## How Do Clients Get this Feature?

This feature is available automatically without configuration. Users with user type privileges to add, view or modify forms see this list. This enhancement is available to all 2xB users that have access to candidate's forms.

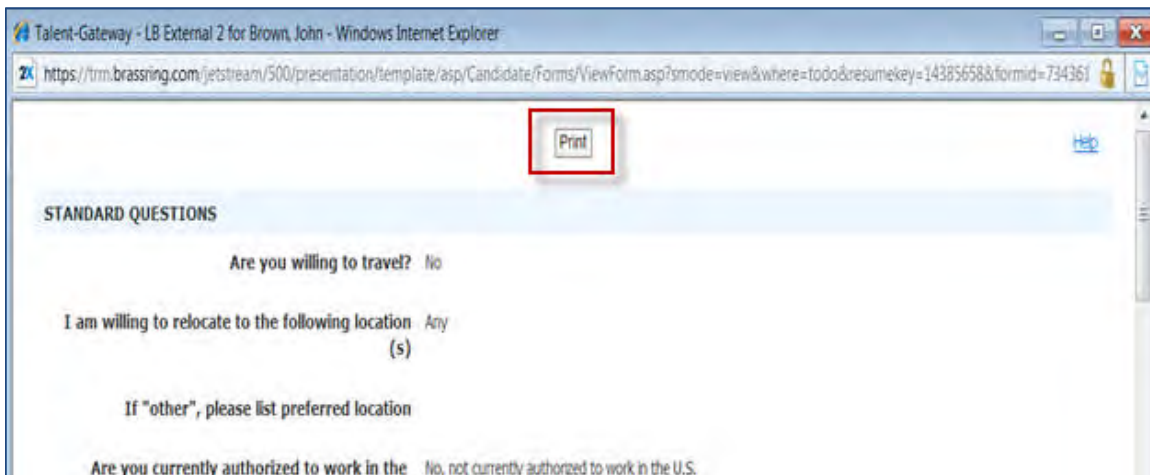
# Candidate Forms – Print while Viewing

Privileged users can now easily print candidate forms, including Talent Gateway and Gateway Questionnaire job response forms. No special formatting will be applied, forms print as displayed.

<b>Product</b> RDP 878 Release 13.3	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Specific conditions required – see details below.	

## Feature Description

A new user type privilege allows 2xB users to print candidate forms, including Talent Gateway and Gateway Questionnaire job response forms, for which they have view privileges. Users with the privilege see a “Print” button on candidate forms.



No special formatting will be applied, forms print as displayed (similar to browser's print functionality).

## How Do Clients Get this Feature?

This feature is controlled by a new user type privilege. Please contact your Kenexa Support Team or Certified Workbench User for more information.

## Configuration by Workbench Self-Service Certified Users

The new **Candidates – Forms “Print” button** user type privilege is a **Candidate Actions 3** function:

**Tools > Users > User types > Edit type permissions > Set privileges [Candidate Actions 3 > Candidates – Forms “Print” button**

Edit Entry Level Manager step 2: Set Candidate Actions 3 privileges  
Step 1: Set name and functions Step 2: Set privileges

**"Candidate Actions 3" privileges**

Select All  
Clear All

**Set privileges**

- Candidates - 'Forms - my drafts' menu
- Candidates - 'View image PDF' button on forms
- Candidates - copy per req forms
- Candidates - Forms "Print" button
- Candidates - Post to candidate portal
- Candidates - Reinstate from Evergreen archive folder (un-archive)
- Onboarding - Hiring Manager access
- Onboarding - Onboarding specialist access
- Onboarding - Recruiter access
- Restrict start HR status when filing to Req

Done Revert to Saved Cancel

There are no dependencies with the privilege; it is not tied to any client setting, nor other user type privileges. It can be turned on/off at any time.

# Candidate Portal – Posting Enhancements

The feature enhancement introduces a Candidate Portal Posting page for posting standalone items and document packets to the candidate portal. The Candidate Portal Posting page workflow also includes the use of email communication templates to notify candidates when documents post to their portal.

<b>Product</b>	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Talent Gateways
<b>LDP 145 Release 13.3</b>	<input checked="" type="checkbox"/> Workbench Self-Service	
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.	

## Project Summary and Background Information

This feature introduces the following functionality:

- New action on candidates from within the Req context (panel, folder, Talent Record) 'Post to Candidate Portal'.
- New page 'Post to Candidate Portal' for posting attachments, generated documents, and/or candidate forms from one page, and for launching the document packet creation workflow.
- New page 'Post to Candidate Portal Confirmation'
- New setting to select a communications template on the Document Packet Posted confirmation page.
- New log 'Candidate Portal Posting History'.
- Updates to existing logs (Attachments, Communication History, and Action log).
- New posting behavior on the Candidate Portal.
- New functions added to the Candidate API.

### Post to Candidate Portal Action

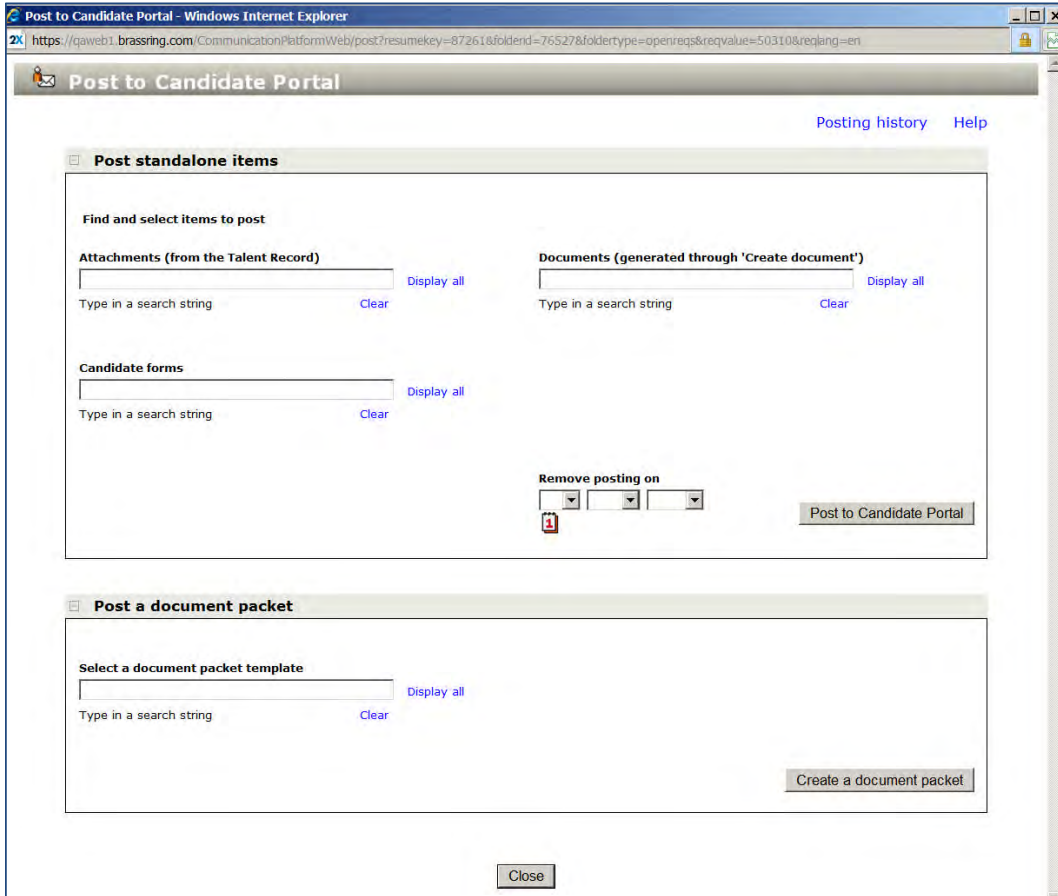
For 2xB users who have the 'Candidates – Post to Candidate Portal user privilege', the Candidate Portal Posting page is accessible via the Actions menu in these locations:

- Candidate Results Panel (accessible from clicking the number link in the Total column of a Req listing panel)
- Req folder page via the Actions menu
- Talent Record accessed from inside a Req folder. (If TR is accessed outside of a Req folder, user can see the new action but it is grayed out and disabled.)

Clicking the link on the Actions menu launches the Post to Candidate Portal Page.


### Post to Candidate Portal Page

On the Post to Candidate Portal Page you can search for and select standalone items for posting or launch the document packet creation workflow.



Standalone items you can post to the Candidate Portal for one or multiple candidates.

- Attachments – attachments stored on the attachments grid of the Talent Record that have a Source of 'Enterprise' for the selected candidate
- Generated documents – documents generated using the Create Document workflow.
- Candidate forms – all Candidate forms configured for the system are displayed.


 Candidate forms do not include req forms, req subsidiary forms, or doc subsidiary forms.

When one candidate is selected, you can take these additional actions:

- Click 'Display all' to list standalone items or document packets.
- Click 'Posting history' to see the 'Candidate Portal Posting History' page for that candidate.

When one or multiple candidates are selected, you can:

- Search for and select one or multiple standalone items of each type. The search field supports a string of up to 50 characters and retrieves up to 50 results.

 Text string search supports all alphanumeric and special characters. Text string search is limited to 50 characters.

- Use the 'Clear All' hyperlink for each document category to clear all search results and select document lists.

Use the **Remove posting on** date field to specify a date to remove postings of standalone documents (optional) and document packets. The selected date refers to all items selected for posting.



When retrieving generated documents from the text string search or when 'Display all' is clicked, if the generated document has the "Restricted offer letter" doc template attribute, the user type and Req team access privileges are respected. The Req team is defined as the Req initiator, the Recruiter, the Hiring Manager, and anyone who has a My Req relationship to the Req.

## Post to Candidate Portal Confirmation Page

This page provides detailed information for all standalone items selected for posting.

The posting confirmation page for standalone items displays messages for successful and unsuccessful posting and Talent Gateway profile errors (if any). You can select a communications template and send the previously selected candidate(s) notification of the posted item(s).

## Document Packet Posted confirmation page

On the existing Document Packet Posted confirmation page, users can select a communications template and send an email on the spot to the selected candidate(s), if desired.

## Candidate Portal Posting History page

When posting documents for one candidate, you can click the Posting History hyperlink to view the candidate's posting history. Viewing posting history for multiple candidates from this page is not available, but you can click the Portal Posting history hyperlink to view a history of updates of attachment, document, and document packet postings.

## Updates to logs (existing and new)

After posting to the candidate portal, the following logs are updated:

- Action Log – all standalone items and document packets
- Attachments log – attachments and generated documents
- Communication History document packets; emails sent from the Post to Candidate Portal Confirmation page and the Document Packet Posted confirmation page.
- Forms – forms posted to the candidate portal
- Candidate portal posting history (accessible via the Candidate Portal Posting Page when one candidate was selected for the Post to Candidate Portal action) – all items and document packets that can be posted to the candidate portal from within any workflow.

The target users for this feature are 2xB users who post items and/or document packets to the candidate portal throughout the duration of the hiring process, and candidates who log into their candidate portals to retrieve documents.

## Candidates - Post to Candidate Portal User Privilege

2xB users must have the new **Post to Candidate portal** privilege and the related Communication user privileges in order to access all Candidate Portal Posting features. (See [WBSS Users](#) section for detailed information on this user privilege, client settings, and others privileges associated with this feature.)

## 2xB User Experience

The following is an example of a typical Post to Candidate Portal workflow for a 2xB user with the required user privileges. The Candidate Portal Posting process can be initiated from either a Req folder or a Talent Record. This workflow demonstrates the path from the Req Folder and represents a typical workflow for posting and diverges when you post either standalone documents or posting document templates.



When posting to the Candidate Portal, the system does not permit duplicate items to be posted if they have already been posted, nor does it allow a candidate form to be posted if the form has already been submitted by the candidate.

2xB user navigates to a Req folder:

1. Clicks the Candidate name.  
The Candidate's Talent Record displays.
2. Clicks the Action menu and selects Post to Candidate Portal.  
The Post to Candidate Portal page launches.

The screenshot shows the 'Post to Candidate Portal' web application interface. The browser window title is 'Post to Candidate Portal - Windows Internet Explorer'. The URL is 'https://qaweb1.brassing.com/CommunicationPlatformWeb/post?resumekey=87261&folderid=76527&foldertype=openreqs&reqvalue=50310&reqlang=en'. The page has a header with 'Post to Candidate Portal' and links for 'Posting history' and 'Help'. The main content area is divided into two sections: 'Post standalone items' and 'Post a document packet'. The 'Post standalone items' section includes three search boxes: 'Attachments (from the Talent Record)', 'Documents (generated through 'Create document')', and 'Candidate forms'. Each search box has a 'Type in a search string' label, a 'Clear' button, and a 'Display all' button. Below these is a 'Remove posting on' section with three dropdown menus and a 'Post to Candidate Portal' button. The 'Post a document packet' section has a 'Select a document packet template' search box with a 'Type in a search string' label, a 'Clear' button, and a 'Display all' button, and a 'Create a document packet' button. A 'Close' button is located at the bottom center of the page.

From the Posting Portal Page the 2xB users can post [standalone items](#) or [launch the Send Communication workflow for document packets](#). To Post standalone items, continue with Step 3 in [Posting Standalone Items](#). To post document packets, continue with Step 3 in [Posting Document Packets](#).





2xB Administrators can restrict the posting of document packets when configuring the Candidate Portal. If a 2xB user does not have the user privilege to post document packets, the Post a Document Packet section (shown at the bottom of the preceding figure) does not display and is not actionable on the Candidate Portal Page.

## Posting Standalone Items

When one candidate is selected, you can click Display all to select from the list of all attachments, generated documents, or forms available for that candidate. Alternatively, you can perform a search in each item type's search field and retrieve items that match your search terms. You can select one or multiple items from each standalone item type.

You can also use the **Remove Posting On** date option to set a removal date for standalone items posted to the Candidate portal. Standalone items types are:

- Attachments
- Candidate Forms (fillable)
- Generated Documents

You can post one or multiple standalone documents to one or more candidate portals.



Generated document types must be created from document templates with the attribute 'Allow posting to Candidate portal' checked.

<p>Select attachment category for generated documents:</p> <p>Select <input type="text"/></p> <p><a href="#">Selection details</a></p>	<p><b>Candidate Portal</b></p> <p><input checked="" type="checkbox"/> Allow posting to Candidate portal</p> <p>Document subsidiary form <input type="text"/></p>	<p><input type="checkbox"/> Restricted Offer Letter</p> <p>Active document template</p> <p><input checked="" type="radio"/> Yes <input type="radio"/> No</p>
--	--	--

Templates and 2xB users used in this workflow must be assigned to Org groups.

2xB user uses this procedure to post standalone items (continued):

3. Clicks **Display all** in the Candidate forms sections.
4. Selects one or multiple candidate forms from the display list.
5. (Optional) Completes the date field for **Removal Posting On**.
6. Clicks **Post to Candidate portal**.

The Post to Candidate Portal Confirmation page launches displaying detailed posting information.

**Post to Candidate Portal Confirmation**

Please review the 'Unsuccessful Candidate Portal Postings' and 'TG Candidate Profile Errors' sections and, if desired, take appropriate action before selecting a Communications template and clicking 'Go'. Clicking 'Go' closes the Confirmation page.

[-] **TG Candidate Profile Errors**

No TG candidate profile errors

[-] **Unsuccessful Candidate Portal Postings**

No posting errors

[-] **Successful Candidate Portal Postings**

Attachment
Attachment List
Attachment and Title List

Notify candidate(s)?

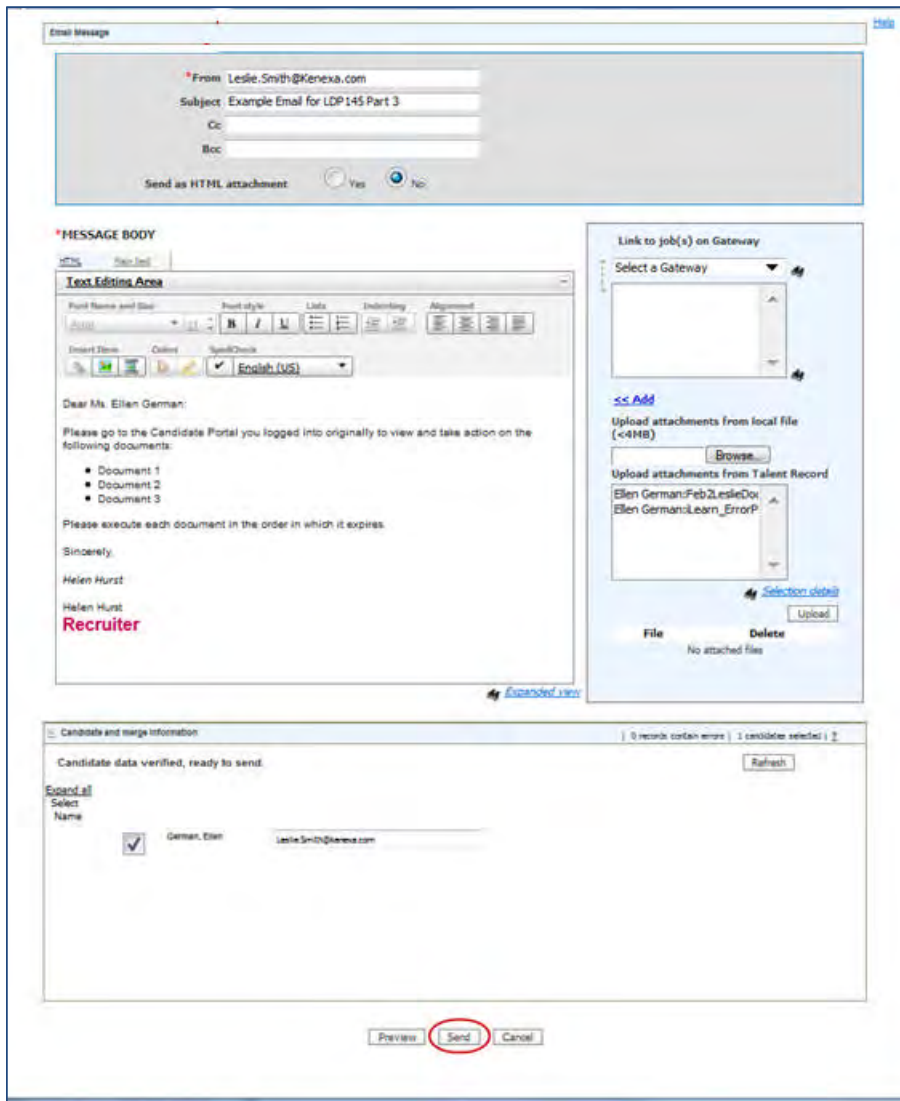
Select a communications template

When items post to the Candidate's portal, detailed posting information is updated on the following pages:

- Candidate portal posting history
- Talent Record Attachments grid
- Talent Record Action Log


7. Clicks **List >>** on the Post to Candidate Portal Page to select an email communication template to send to candidate.

The email template displays:




8. Completes the email template and clicks **Send**.  
The following logs are updated:

- Action Log
- Communications History

 If the save correspondence option on the email template is set to yes, a hyperlink to the email is saved and can be launched from the Communication History grid and the Actions Log.

9. Clicks **Close** on the Portal Confirmation.  
10. Clicks the **Posting History** hyperlink on the Candidate Portal Page.  
The page reflects the posting history of the currently selected candidate.

 Posting History hyperlink is only available when posting for one candidate. If posting to multiple candidate portals, the Posting History link is grayed out

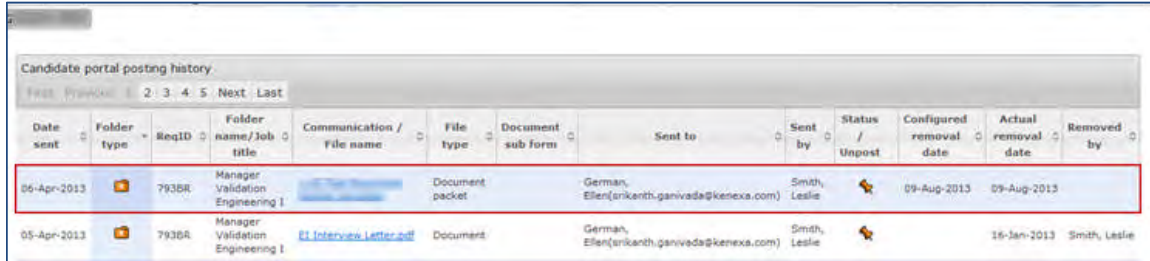
11. Clicks **Close** to close the Portal History Page.

12. Clicks **Close** to close the Candidate Portal Posting Page

### To Unpost Items Manually

To unpost items manually, 2xB user accesses the Candidate Portal Posting History page and:

1. Clicks the orange push-pin for the posted document and then click **OK** to unpost. The document is unposted and the orange pushpin changes to white.




The screenshot shows a table titled "Candidate portal posting history" with columns: Date sent, Folder type, ReqID, Folder name/Job title, Communication / File name, File type, Document sub form, Sent to, Sent by, Status / Unpost, Configured removal date, Actual removal date, and Removed by. Two rows are visible, both with orange pushpin icons in the Status column.

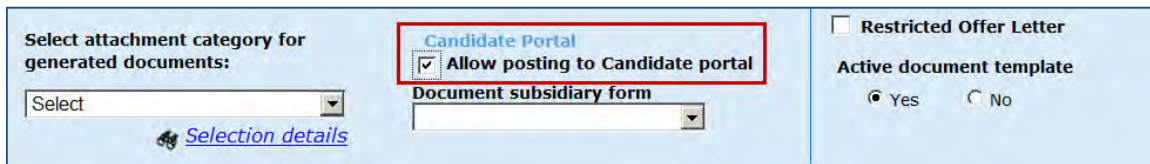
Date sent	Folder type	ReqID	Folder name/Job title	Communication / File name	File type	Document sub form	Sent to	Sent by	Status / Unpost	Configured removal date	Actual removal date	Removed by
06-Apr-2013		79358	Manager Validation Engineering I		Document packet		German, Ellen(ellen.kent@kenexa.com)	Smith, Leslie		09-Aug-2013	09-Aug-2013	
05-Apr-2013		79366	Manager Validation Engineering I	Interview Letter.pdf	Document		German, Ellen(ellen.kent@kenexa.com)	Smith, Leslie			16-Jan-2013	Smith, Leslie

- 2. Clicks **Close** to close the Portal History Page.
- 3. Clicks **Close** to close the Candidate Portal Posting Page.

### Posting Document Packets


When posting document packets to the Candidate portal, you can click **Display all** to select available document packet templates (when one candidate is selected); or search for a document packet template, select a document packet template and then launch the existing Send communication (document packet) workflow. You can post one document packet only to the candidate portal in one posting operation (but it can be for one or multiple candidates).

 Document included in Document Packets must be created from document templates with the attribute 'Allow posting to Candidate portal' checked.



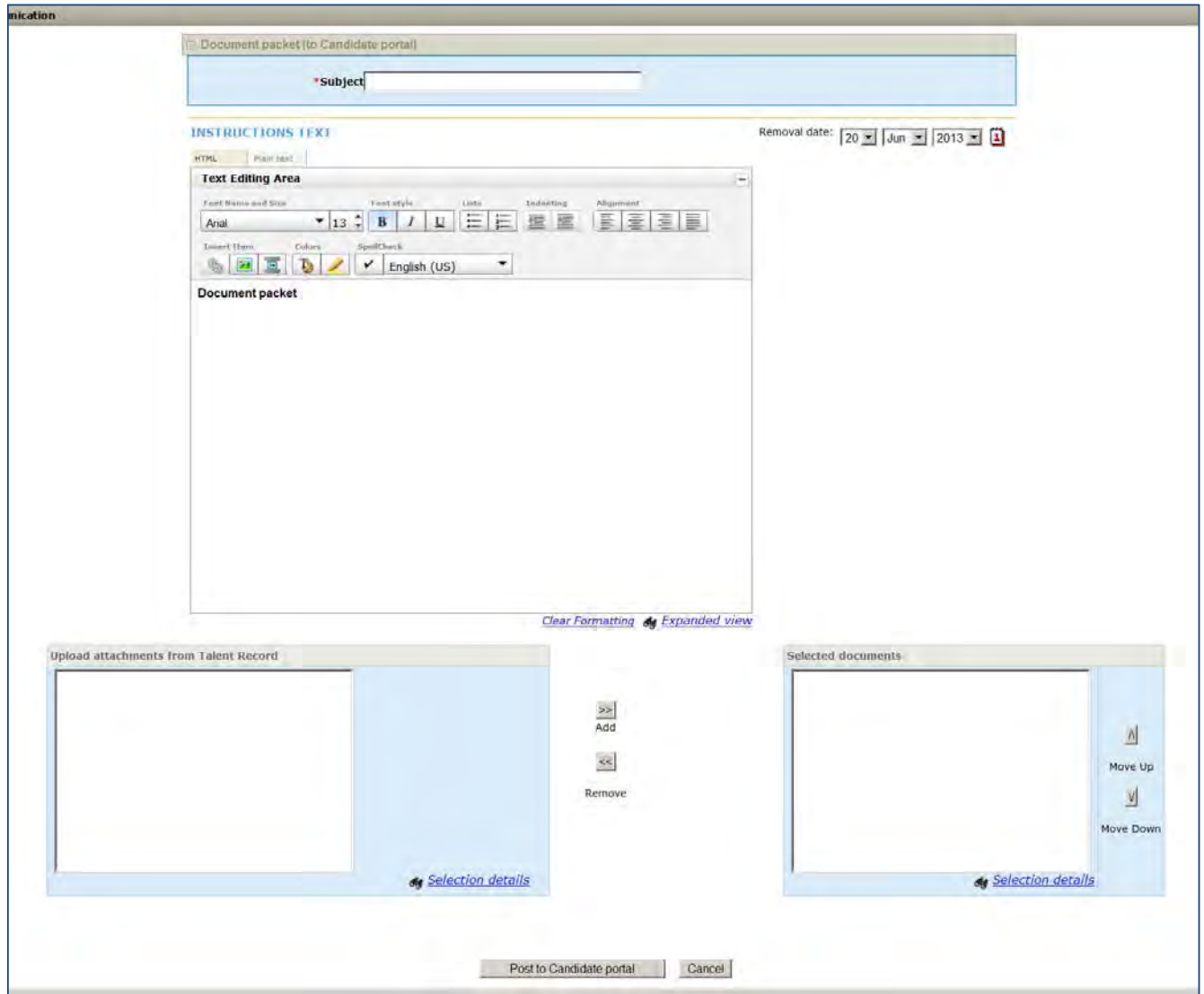
The screenshot shows a form for selecting attachment categories. A dropdown menu is set to "Select". A red box highlights the "Candidate Portal" section, which includes a checked checkbox for "Allow posting to Candidate portal" and a "Document subsidiary form" dropdown. To the right, there is a "Restricted Offer Letter" checkbox and an "Active document template" section with "Yes" and "No" radio buttons.

- 3. Clicks **Display all** in the Document Packet section.
- 4. Selects a Document Packet Template.
- 5. Clicks **Create a Document Packet**.

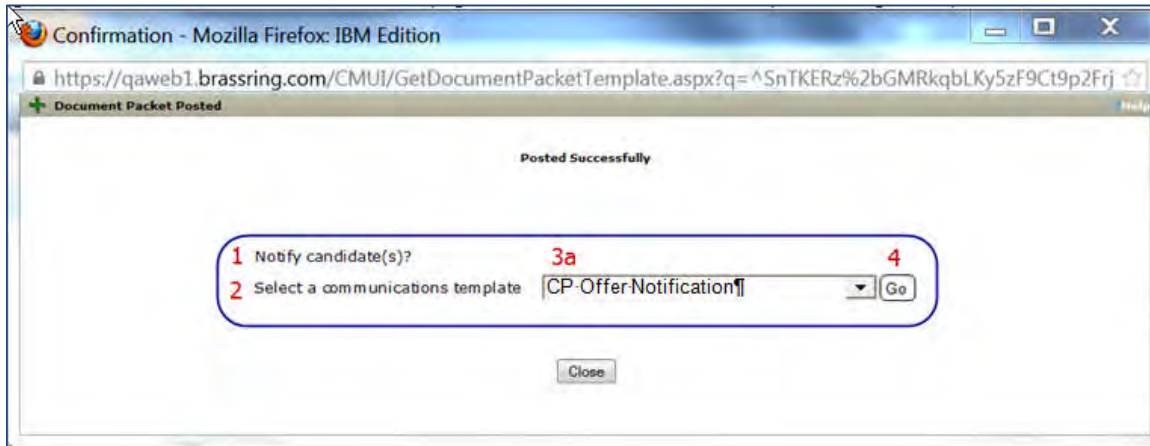


The screenshot shows the "Post a document packet" form. It has a search bar for "Select a document packet template" with a "Display all" button and a "Clear" button. Below the search bar are two radio buttons: "Document packet" (selected) and "Document packet forms to review". A red box highlights the "Create a document packet" button at the bottom right.

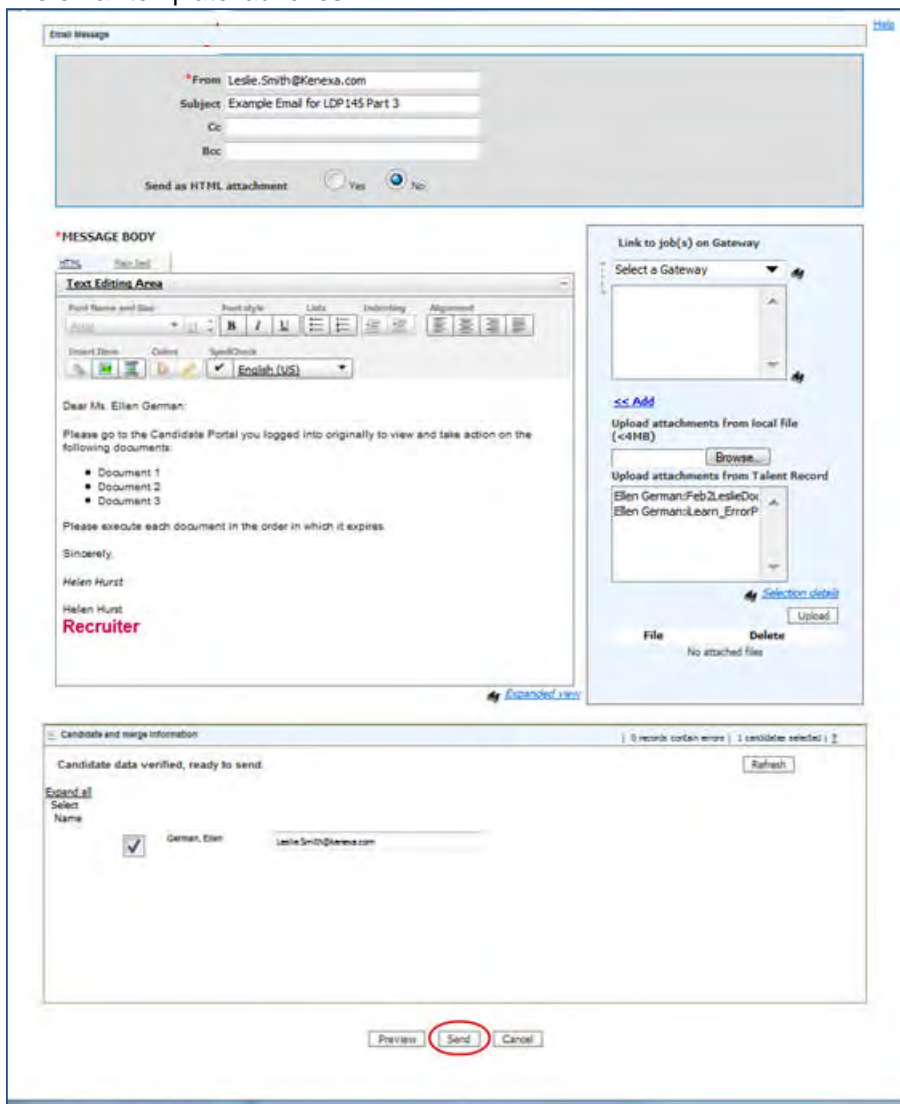
The Document Packet (to Candidate Portal) page displays:



6. Completes the document packet, set a removal date (optional), upload attachments to include in the packet, and click **Post to Candidate Portal**.  
The Post to Document Packet Posted Confirmation page launches displaying detailed posting information. Detailed posting information is updated on the following pages:
  - Candidate portal posting history
  - Talent Record Communications History
  - Talent Record Action Log
7. Selects an email template to notify candidate of the document packet posting using the drop-down menu (or List >> button) and click **Go**. (The List button only displays if there are more than 200 possible email templates.)



The email template launches.



8. Completes the email template and clicks **Send**.

The following logs are updated with the sent email:

- Action Log
  - Communications History
9. Clicks **Close** on the Portal Confirmation.
  10. Clicks the **Posting History** hyperlink on the Candidate Portal Page.  
The page reflects the posting history of the currently selected candidate.
  11. Clicks **Close** to close the Portal History Page.
  12. Clicks **Close** to close the Candidate Portal Posting Page.

## To Unpost Items Manually

To unpost items manually, 2xB user accesses the Candidate Portal Posting History page and:

1. Clicks the orange push-pin for the posted document packet and then clicks **OK** to unpost the selected item.  
The document is unposted and the orange pushpin changes to white.

Date sent	Folder type	ReqID	Folder name/Job title	Communication / File name	File type	Document sub form	Sent to	Sent by	Status / Unpost	Configured removal date	Actual removal date	Removed by
06-Apr-2013		7935R	Manager Validation Engineering I	06-Top-Resume-Review-2013-04-06.pdf	Document packet		German, Ellen(arikenth.ganivada@kenexa.com)	Smith, Leslie	📌	09-Aug-2013	09-Aug-2013	
05-Apr-2013		7936A	Manager Validation Engineering I	01-Interview-Letter.pdf	Document		German, Ellen(arikenth.ganivada@kenexa.com)	Smith, Leslie	📌		16-Jan-2013	Smith, Leslie

2. Clicks **Close** to close the Portal History Page.
3. Clicks **Close** to close the Candidate Portal Posting Page.

## Candidate Experience

Candidates accessing fillable candidate forms on their Candidate Portal must now complete the fillable candidate form in one sitting. If a candidate does not complete and submit the candidate form when accessing their candidate portal, the form is not saved. On the candidate's next visit to the portal, a completely new form is created and candidate must complete all fields.

## Limitations and Known Issues

- The Posting history link on the Candidate Portal Page is only available when posting for one candidate at a time. When posting for multiple candidates, the Posting History link is grayed out.
- In order to post generated documents to the Candidate's portal, the generated document types must be created from document templates with the attribute 'Allow posting to Candidate portal' checked. Therefore, there could be generated documents saved to the Attachments grid that are not postable to the Candidate portal. On the attachment grid, the white pushpin does not appear in the Post to Portal column for these documents.
- Req forms, Req subsidiary forms, and Doc Subsidiary forms are not included in the candidate form text string search.
- Text string search on the Candidate Portal Posting Page is limited to 50 characters per document category.

## How Do Clients Get this Feature?

This feature is controlled by new client settings and the User Type privilege, Candidate – Post to Candidate Portal, in Workbench. Please contact your Kenexa Support Team or Certified Workbench User for more information.

In order to access all the features associated with Candidate Portal Posting Enhancements you must:

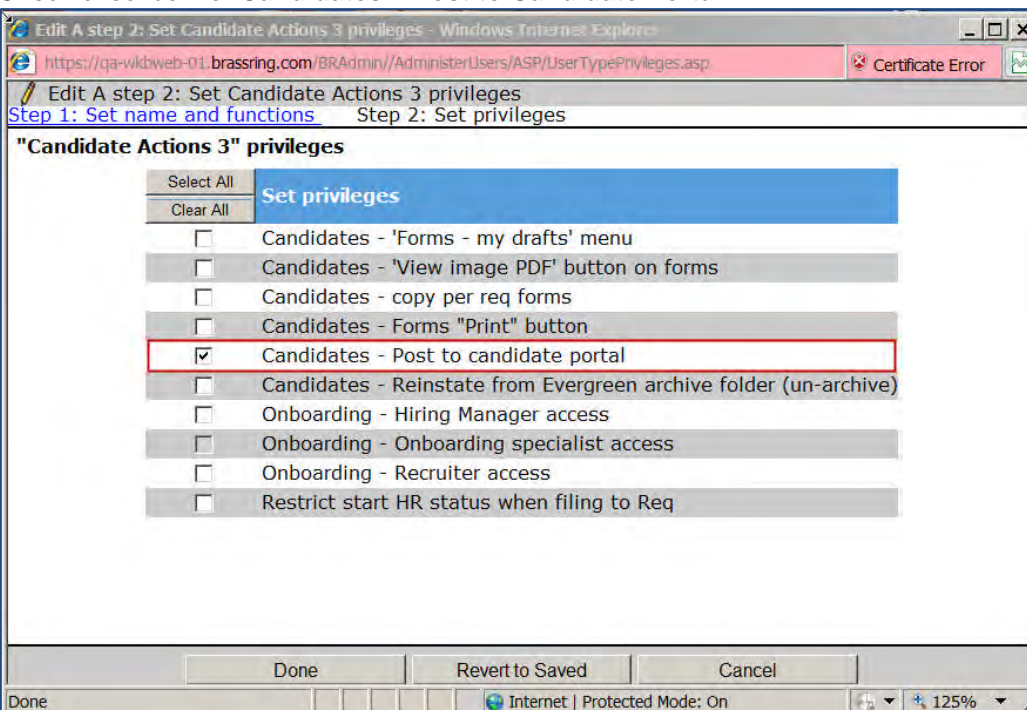
- Enable the existing user privileges associated with this feature (See [Associated Candidate Portal Posting User Privileges](#).)
- Configure the Send Communication workflow
- Ensure templates and users belong to org groups

## Workbench Self-Service Certified Users

2xB users must have the new **Post to Candidate portal** privilege to post to the Candidate Portal. In addition, to access all of the functionality associated with the Candidate Portal Posting page, refer to [Associated Candidate Portal Posting User Privileges](#).

To configure the Candidate Portal Posting user privilege:

1. **Tools > Users > User types > Edit type permissions** icon.
2. Click **Candidate Actions 3** pencil icon.  
The name and functions dialog box displays.
3. Check checkbox for **Candidates – Post to Candidate Portal**.



4. Click **Done**.
5. Click **Save**.

## Associated Candidate Portal Posting User Privileges

You can set the following categories of user type privileges for this feature in:

**Tools > Users > User types > Edit type permissions**

- [Communications](#)
- [Attachments](#)
- [Sensitive Attachment](#)
- [Secure Candidates and Secure Reqs](#)

### Communications

Configuring the communication privileges allows 2xB users to create and post documents, and to view the communication history. Select the Communications section and select desired privileges from the following list:



- Blurbs – add
- Blurbs – administer
- Blurbs – delete
- Communications – enable
- Create document – edit pre-configured document name
- Create document – enable
- Create document – minimize Document Template section
- Document templates – add
- Document templates – administer
- Document templates – delete
- E-mail templates – add
- E-mail templates – administer
- E-mail templates – delete
- View all stored communication history

For document packets, restrict or allow these specific Communications privileges:

- Document packet – edit preconfigured subject
- Document packet – send
- Document packet – view
- Document packet templates – add
- Document packet templates – administer
- Document packet templates – delete



If Document Packet posting privileges are not selected, the Candidate Portal Posting Page displays only the Post Standalone items section.

### Attachment Privileges

Configure the following Attachment privileges from the Candidate Actions function if you intend to use Attachments in the Candidate Portal Posting workflow.

- Attachments – Add/View/Delete "My 2xB attachments"
- Attachments – delete "All"
- Attachments – view "All attachments uploaded via 2xB"

### Sensitive Attachment Privileges

Clients can configure attachment categories that have the attribute of being 'Sensitive' and then select a sensitive attachment category for an attachment or a document template. When a document template has a sensitive attachment category, the document generated from that document template is considered to be a sensitive attachment.

Users with one of the following privileges in the Candidate Actions 2 function can view generated documents with the 'Sensitive' designation.

- Attachments – post to Candidate portal
- Attachments – Sensitive attachments – all
- Attachments – Sensitive attachments in my reqs only

### Secure Candidates and Secure Reqs

If secure reqs are used in the candidate portal posting workflow, the secure req client setting must be enabled as well as secure req privileges. Contact your Kenexa Support Team member to enable the secure req client setting. Associated candidate portal posting user privileges include Secure reqs and Secure candidates. The Secure reqs user privilege allows 2xB users to view secure reqs and the Secure candidates user privilege

allows 2xB users to view secure candidates when performing Candidate Search, Quicksearch, Filter folders and Quick Filters.

- Access Secure reqs (located in Edit type permissions > Reqs function)
- Access Secure Candidates (located in Edit type permissions > Search function)

# Kenexa Tasks

Two new client settings control the Candidate Portal Posting Page workflow.

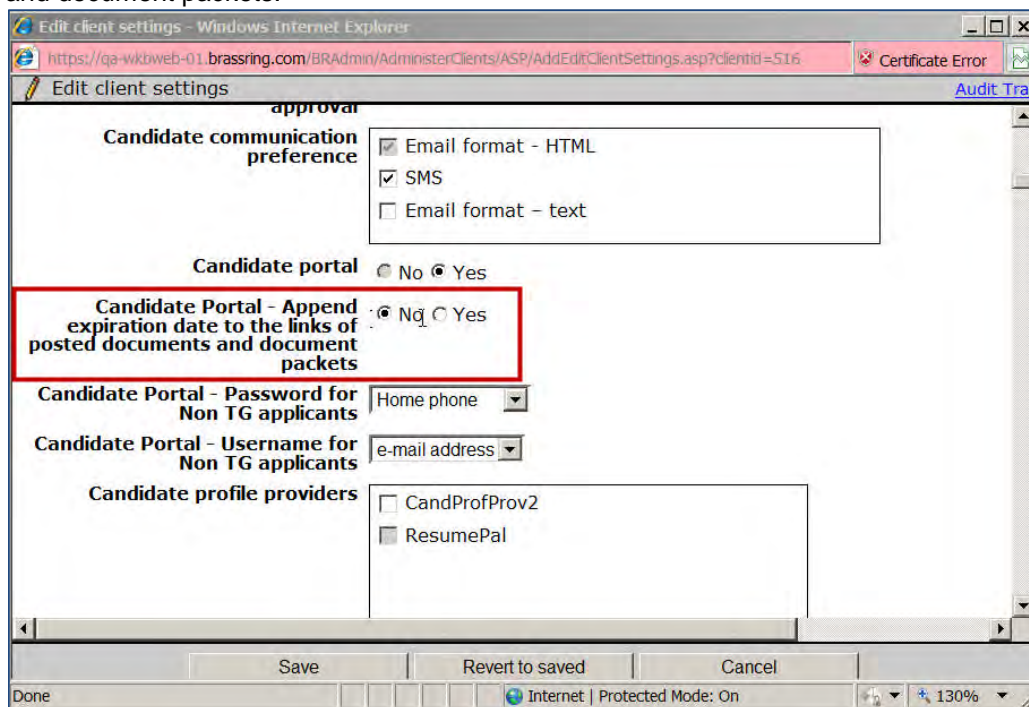
- 'Candidate Portal - Append expiration date to the links of posted documents and document packets' controls the visibility of the expiration date on links to documents and document packets posted on the Candidate Portal: The default for this setting is set to **Yes** and the expiration date shows by default. .
- 'Allow Communications template selection on Candidate Portal posting confirmation pages' controls the visibility of the option to select a communications template on the 'Post to Candidate Portal Confirmation' and 'Document Packet Posted' confirmation page. The default for this setting is set to **Yes**. The settings to select the communications template on the confirmation pages display by default and clients must set the client setting to **No** to hide them.

## Client Setting – Append expirations date to the links of posted documents and document packets

Use this procedure to hide the expiration date on the links for documents and document packets on the Candidate Portal.

In Workbench:

1. **Admin > Manage Clients > Edit Client Settings.**  
The client settings dialog box displays.
2. Click the **No** radio button for Candidate Portal – Append expiration date to the links of posted documents and document packets.



3. Click **Save**.

## Client Setting – 'Allow Communications template selection on Candidate Portal posting confirmation pages'

Use this procedure to hide the visibility of the option to select a communications template on the 'Post to Candidate Portal Confirmation' and 'Document Packet Posted' confirmation page.

In Workbench:

1. **Admin > Manage Clients > Edit Client Settings.**  
The client settings dialog box displays.
2. Click the **No** radio button for 'Allow Communications template selection on Candidate Portal posting confirmation pages.'
3. Click **Save**.

# Candidate Purge – Purging Specific Form Fields

The Candidate Purge utility supports rules-based criteria sets and schedules for automated purges of candidate data from Kenexa 2x BrassRing and Talent Gateways. The utility has been enhanced to include a new Partial purge operation. This enhancement provides a means to schedule and complete the automatic deletion of “sensitive” information for candidates who meet the definition of “inactive,” while leaving the candidate’s profile intact.

<b>Product</b> LDP 124 Release 13.3	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes, for clients using Candidate Purge Utility – details in <i>Visible Changes</i> document sent for each release build.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.	

## Feature Description

The Candidate Purge utility supports rules-based criteria sets and schedules for automated purges of candidate data from Kenexa 2x BrassRing and Talent Gateways. The utility has been enhanced to include a new “**Partial purge**” operation.

Partial purge provides a means to schedule and complete the automatic deletion of information collected on a candidate form in form fields specifically characterized as “purgeable” – such as information an organization deems sensitive – for candidates who meet the definition of “inactive,” while leaving the candidate’s profile intact. An inactive candidate is one who has not logged into his or her account AND for whom no 2xB user/recruiter has taken any action for some configurable number of days (for example, 365 or 720).

## 2x BrassRing Admin+ User Experience

New partial purge capability in the existing Candidate Purge utility removes purge-eligible field data collected on candidate forms when the configured criteria for inactivity is met for a candidate. Partial purge workflow requires:

- Client settings be enabled by your Kenexa Support Team
- New candidate form field *attribute* be set in Workbench. The attribute determines whether the field’s contents are “purgeable,” i.e., eligible for being purged, un-set, or otherwise de-selected, depending on the control type.
- 2xB users previewing or performing partial purge have required user type privileges.
- Privileged 2xB users:
  - define purge criteria sets
  - schedule partial purge preview reports
  - schedule partial purge operations.

## Define Purge Criteria Sets

Configure one or more Partial purge selection criteria sets on the “Candidate purge criteria set properties” page in 2xB (**Admin > Admin+ > Candidate purge criteria > Manage purge criteria sets > Add | Edit criteria set**).

1. On the **Candidate purge criteria set properties** page, name the criteria set and select purge selection criteria related to Candidate and HR status.

Criteria include:

Countries

Candidate types

Folders

- Any folder, No folder, No req folder, Reqs with these criteria
- Req status
- Department
- Location/Division
- HR status(es) within folder(s) [with ability to specify excluded statuses]
  - But exclude these statuses ...

- Select purge selection criteria for dates (for detecting Candidate or Recruiter activity, within a certain number of “days back”)

**Date criteria**

Even if candidates meet all of the status criteria defined above, they will only be selected for purging if they also meet the following date criteria. If a specific number of days back is entered, the system will select candidates for whom that activity has not been performed in that number of days. (For instance, entering '365' will select candidates for whom the activity has not occurred within the past year.) Entering a value into "Days back" will also select candidates for whom that activity has never been performed. This value must be between 60 and 9999. Finally, selecting the "Never" checkbox will only select candidates for whom that activity has never been performed. Note that all the completed date criteria must be true in order for a candidate to be selected for purging.

	Days back	Never	This date would be used if the criteria set were run now.
Candidate is first loaded	60	<input type="checkbox"/>	01-APR-2012
Candidate is most recently loaded	60	<input type="checkbox"/>	01-APR-2012
Candidate updates profile through gateway	60	<input type="checkbox"/>	01-APR-2012
HR status is modified	60	<input type="checkbox"/>	01-APR-2012
Candidate form is updated	60	<input type="checkbox"/>	01-APR-2012
eLink of talent record or candidate form is sent	60	<input type="checkbox"/>	01-APR-2012
Acknowledgement is sent	60	<input type="checkbox"/>	01-APR-2012
Candidate is moved to req folder, working folder, or Inbox	60	<input type="checkbox"/>	01-APR-2012
Note is added	60	<input type="checkbox"/>	01-APR-2012

Date criteria include:

Activity

- Candidate is first loaded
- Candidate is most recently loaded
- Candidate updates profile through gateway
- HR status is modified
- Candidate form is updated
- eLink of Talent Record or candidate form is sent
- Acknowledgement is sent
- Candidate is moved to Req folder, Working folder, or Inbox

- Select fields to be included on the report (preview).

**Report output fields**

Please select what columns should appear on the output report. This section does not affect which candidates will be selected for purging; it only affects what data is presented about those candidates.

<input type="checkbox"/>	First name
<input type="checkbox"/>	Middle name
<input type="checkbox"/>	Last name
<input type="checkbox"/>	E-mail address
<input type="checkbox"/>	State/province
<input type="checkbox"/>	Country
<input type="checkbox"/>	Candidate type
<input type="checkbox"/>	Most recently changed HR status
<input type="checkbox"/>	Date first loaded
<input type="checkbox"/>	Date most recently loaded
<input type="checkbox"/>	Date of most recent profile update

Output fields include:

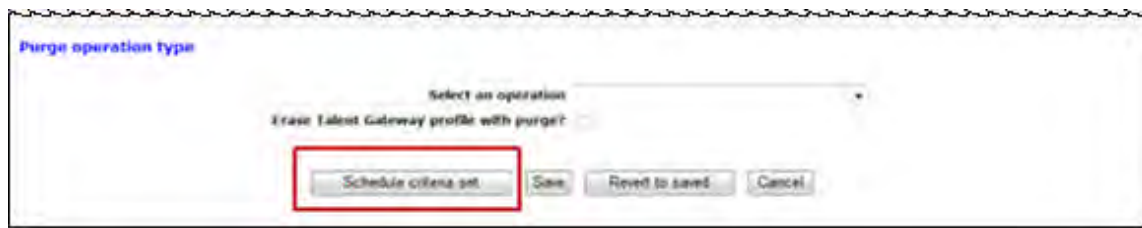
Required field:

Candidate reference number

Remaining fields are optional

- |                |                                    |
|----------------|------------------------------------|
| First name     | Candidate type                     |
| Middle name    | Most recently changed HR status    |
| Last name      | Date first loaded                  |
| E-mail address | Date most recently loaded          |
| State/province | Date of most recent profile update |
| Country        |                                    |

4. Select purge operation type. (Erase TG profile option is not available for partial purge).



Two operations support the purging of form field data specifically configured as eligible for purging:

- **Preview of purge/partial purge**  
produces a report/preview on the candidates who meet the purge or partial purge criteria. The preview report tells you what will be purged when you actually run the purge operation. **Best practice:** Always run the Preview operation before running the purge operation.
- **Partial purge**  
provides a report on the candidates who met the partial purge criteria, *for whom the designated form fields have been purged.*

The third operation, **Purge candidates**, is used to for complete purges of the candidate information.

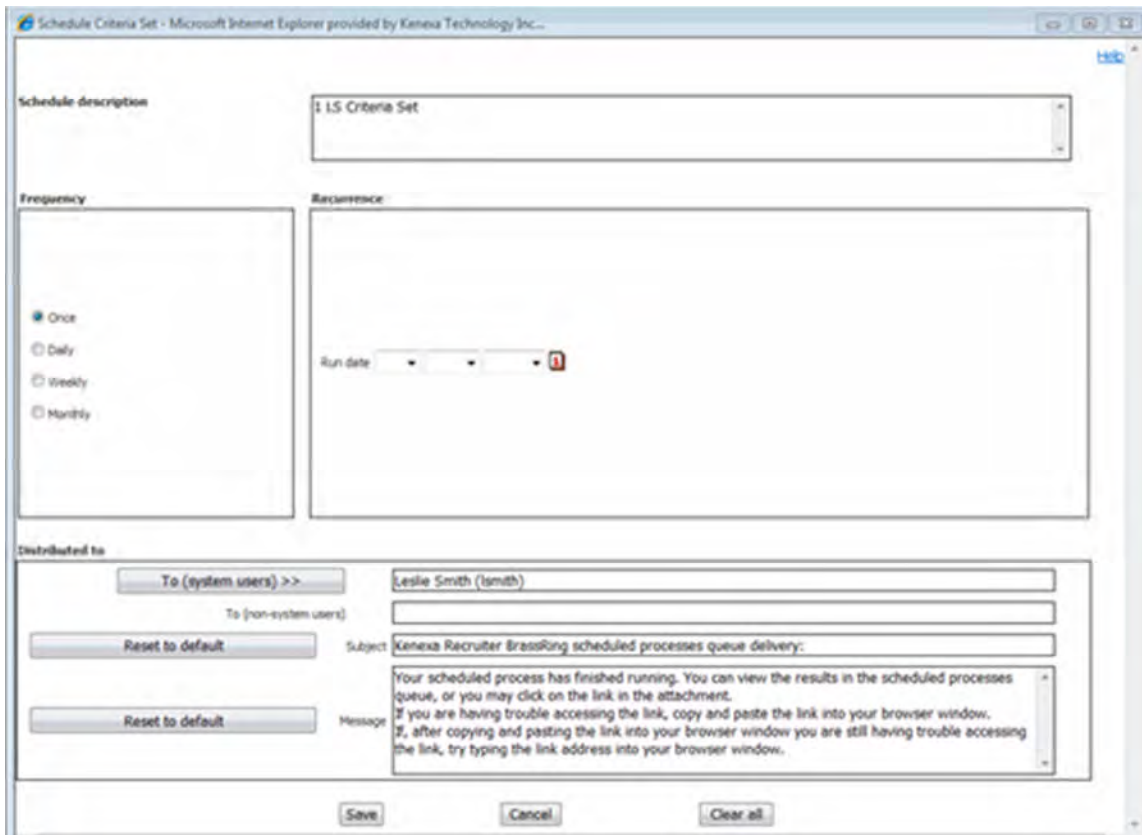
5. To schedule the preview or the partial purge (whichever is specified as the operation), click **Schedule criteria set**.

### Schedule Preview of Partial Purge

Configure scheduling for the preview operation, **Preview of purge/partial purge**, to produce the report telling you what will be purged when the purge operation runs.

1. After you click **Schedule criteria set**, the Schedule Criteria Set page launches. Use this page for scheduling either preview or purge operations.

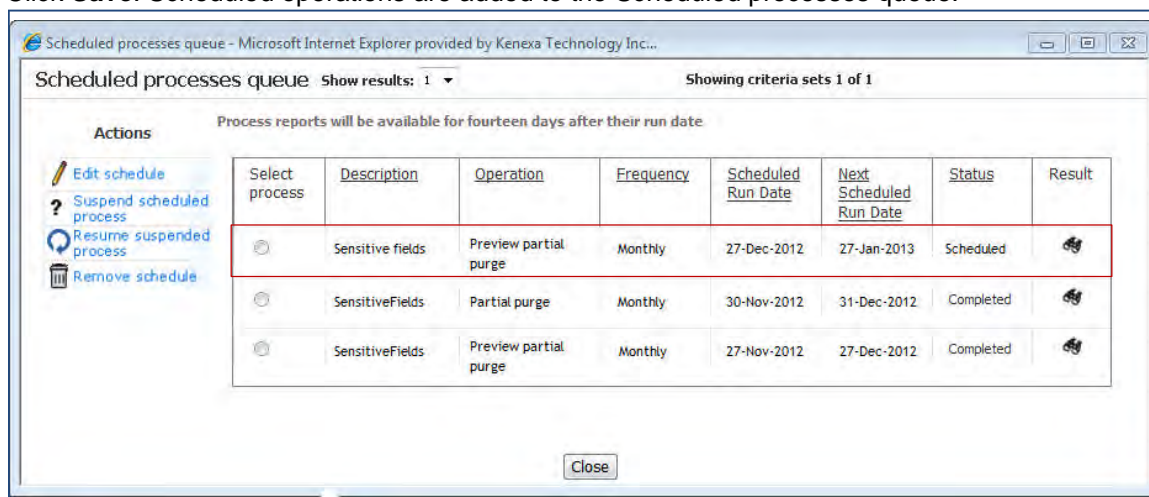




2. Set the schedule as desired:

- Schedule frequency: Once, Daily, Weekly, or Monthly
- Set recurring schedules in the Recurrence section.
- Set automated email distribution of Partial purge preview and Partial purge reports to System Users, as desired. The eLink expires 14 days from the date of the report. The report lists the candidates who met the selection criteria does not display which fields were cleared.

3. Click **Save**. Scheduled operations are added to the Scheduled processes queue.



You can act upon any type of scheduled operation from this page in the same ways as for the previously existing purge operation types:

- Edit schedule
- Suspend scheduled process
- Resume suspended process
- Remove schedule
- View the results from the Results column on the grid

### Preview Operation - What Happens?

The Preview of purge/partial purge operation provides **only a report** of the candidates who meet the purge or partial purge criteria on the day you run the preview operation. The report consists of the output fields configured on the Candidate purge criteria set properties page.

#### Scheduled Processes Queue

Navigate to **Admin >Admin+ >Scheduled Process Queue** after the run date is complete.

- List of scheduled and completed processes is displayed in separate rows, if applicable.
- When a scheduled partial purge has already run, its status is listed as 'completed'.
- Clicking the binoculars icon launches a pop-up message asking whether to open, save, or cancel the report.
- Clicking **Open** launches an Excel spreadsheet with two pages.

#### Email notification

- System users added to the schedule receive an email containing an attachment with a 'Download Report' hyperlink.
- Clicking the "Download Report" hyperlink launches the 'open, save, or cancel' pop-up message for the report.
- Clicking Open launches the identical Excel spreadsheet as accessed from the Scheduled Processes Queue page.

### Schedule Partial Purge Operation

You schedule the actual purge or partial purge operation in the same manner described above for the preview, selecting the criteria set and scheduling the Partial purge operation rather than the preview operation. You can fine-tune the criteria set using the results of the preview report.



**Before running a purge operation the 1st time:** Run one or more preview reports before scheduling the actual purge operation.

**Continuously:** Run one or more preview reports several days before a scheduled purge to ensure that your criteria sets are selecting the correct data for purging.

### Partial Purge Operation - What Happens?

This operation provides a report of the candidates who met the Partial purge criteria on the day the purge operation is run **and for whom the designated form fields have now been purged**. The report consists of the output fields configured on the Candidate purge criteria set properties page.

#### Scheduled Processes Queue

Navigate to Admin ->Admin+ ->Scheduled Process queue after the run date is complete.

1. The list of scheduled and completed processes will be displayed in separate rows, if applicable.
2. When a scheduled partial purge has already run, its status is listed as 'completed'.
3. Clicking on the binoculars icon launches a pop-up message asking whether to open, save, or cancel the report.
4. Clicking **Open** launches an Excel spreadsheet with two pages.

## Email notification

1. System users added to the schedule receive an email.
2. The email contains an attachment containing a 'Download Report' hyperlink.
3. Clicking the "Download Report" hyperlink launches the 'open, save, or cancel' pop-up message for the report.
4. Clicking Open launches the identical Excel spreadsheet as accessed from the Scheduled Processes Queue page.

## Best Practice Recommendations

**Before running a purge operation the 1st time:** Run one or more preview reports before scheduling the actual purge operation.

**Continuously:** Run one or more preview reports several days before a scheduled purge to ensure that your criteria sets are selecting the correct data for purging.

## How Do Clients Get this Feature?

This feature is controlled by a new form field attribute, client settings, and user type privileges. Please contact your Kenexa Support Team or Certified Workbench User for more information.

## Workbench Self-Service Certified Users

### Setting Candidate Form Field Attribute

A new "Purge field data via partial purge?" field attribute is available for the configuration of candidate form fields in:

**Tools > Forms > Candidate forms > Add new field | Edit field attributes** [for selected candidate form].

The screenshot shows a web browser window titled "Define field attributes - Microsoft Internet Explorer provided by Kenexa Technology Inc...". The page content is titled "Define field attributes" and includes an "Audit Trail" link. The form is for a field named "CriminalRecord". It contains several configuration options:


- Required for form creation from TG:** Radio buttons for Yes and No, with "No" selected.
- Publish for use as autofill?:** Radio buttons for Yes and No, with "No" selected.
- Purge field data via partial purge?:** Radio buttons for Yes and No, with "No" selected. This option is highlighted with a red rectangular box.
- Search / Output:**
  - Searchable?:** Radio buttons for Yes and No, with "No" selected.
  - Outputable?:** Radio buttons for Yes and No, with "No" selected.
- Used (TEXT):** A text input field containing "125".
- Available (TEXT):** A text input field containing "0".
- Enable Search & Output:** A checkbox that is currently unchecked.
- Options source:** Radio buttons for "Maintain Custom List" (selected) and another option.

The attribute appears on the second page of the 'Add new field / Edit field attributes' workflow, for fields added to all four candidate form types (Single-per-candidate, Single-per-candidate-per-req, Multiple-per-candidate, and Multiple-per-candidate-per-req).

- Default is **No**
- Select **Yes** to make field's data eligible for purging.
- Setting is available for candidate form fields of the following control types:

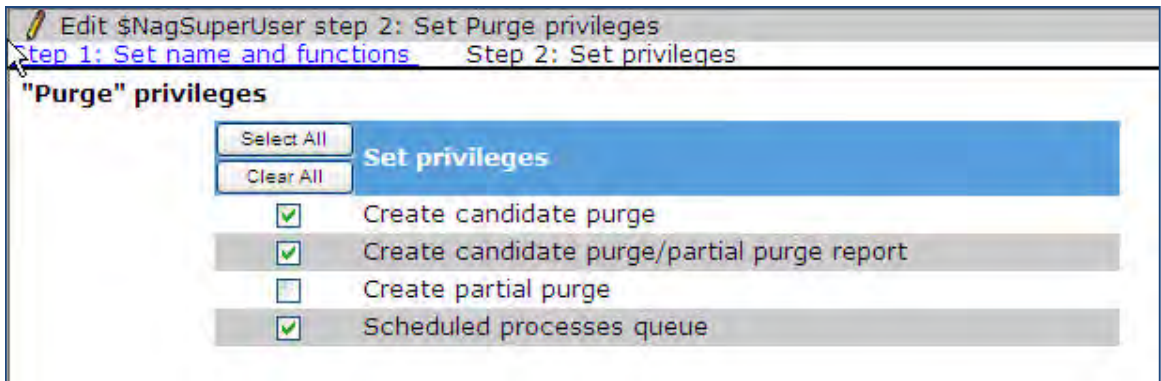
Check box (cleared but not disabled)	Date (cleared)	SSN (cleared)
Radio Button (deselected)	Email address (cleared)	Text (cleared)
Single-Select (set back to the default; recommended default state means "nothing selected")	Numeric (cleared)	Text area (cleared)
Multi-select (set back to the default; recommended default state means "nothing selected")		

- Setting is not visible on the second page for Label type fields.
- To make Autofill fields eligible for purging, define the field that will contain the original source data for all the autofill fields that are populated successively by it:
  1. On the first page, select a control Type that is eligible for purging. (See the list above.)
  2. On the second page, set the existing attribute, 'Publish for use as autofill?' to **Yes**.
  3. On the second page, set the new attribute, 'Purge field data via partial purge?' to **Yes**.

 As long as the original source field is defined as eligible for purging, the purge operation will cascade to all the fields into which it is autofilled. The purge operation will continue to operate the same way on autofill- -autofill fields when that upcoming feature becomes available.

### Setting User Type Privileges

Grant user type privileges for administering Candidate Purge operations. All Purge utility privileges previously located under the Admin+ function group are relocated under a new function called **Purge** (in **Tools > Users > User types > Edit type permissions** [for selected type] > **Purge**)



- **Create candidate purge/partial purge report** (previously called Create candidate purge report): user can define one or more candidate purge or partial purge criteria sets, select the preview operation, and save for scheduling. The saved criteria set is added to the grid on the **Manage purge criteria sets** page. This setting allows the user to run a preview report of the purge or partial purge operation.
- **Create partial purge** (new privilege): user can access Candidate purge action in the 2xB Admin > Admin+ menu to define partial purge criteria sets, select the "Partial purge" operation, and save for scheduling. The saved criteria set is added to the grid on the **Manage purge criteria sets** page.

- **Create candidate purge:** user can define one or more candidate purge criteria sets, select the “Purge candidates” operation, and save for scheduling. The saved criteria set is added to the grid on the **Manage purge criteria sets** page.

**Note:** The **Candidate purge** menu item in the **Admin+** menu in 2xB is visible when any of the above privileges is turned on for a user type.

- **Scheduled processes queue** - controls the ability to schedule purge or partial purge preview report operations or purge or partial purge operations.

**Note:** The **Scheduled processes queue** menu item in the **Admin+** menu in KRB is visible when this privilege is turned on for a user type.

## Kenexa Tasks

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The Candidate Purge utility has been enhanced to include a new Partial purge operation. In addition, the existing “Preview of purge” capability has been renamed and now covers “Preview of purge/partial purge.”

To enable:

1. Turn on client settings.
2. On candidate forms that capture sensitive information, configure form fields to be eligible for purging (as described in the [Workbench Self-Service](#) section). Candidate forms data model and application flow must already be worked out in detail as part of the implementation process (which is beyond the scope of this project).
3. Enable user type privileges for the Candidate purge utility (as described in the [Workbench Self-Service](#) section).

## Workbench

For clients to use the full candidate purge functionality, enable the following client settings:

- **Enable candidate purge**
- **Enable candidate purge preview report**
- **Enable scheduled processes queue**

# Candidates – Mobile Apply Enhancements

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With this release, existing features are enhanced and new features are added to the Mobile-optimized Talent Gateways. Access to content from Cloud-based services and enhanced security are some of the new offerings.

<b>Product</b> LDP 109 Release 13.3	<input checked="" type="checkbox"/> 2x BrassRing <input checked="" type="checkbox"/> Workbench Self-Service	<input checked="" type="checkbox"/> Talent Gateways
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Specific conditions required – see details below. <input checked="" type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.	

## Feature Description

New features are added to the Mobile Apply feature for enhanced candidate experience and account security.

Candidates can now fetch their information from their LinkedIn profile, as well as upload files, stored in different cloud-based sources like Google Drive and Dropbox, directly from their mobile device while completing the job application process.

The following features of Candidate Mobile Apply enable candidates to:

- [Build from LinkedIn](#)
- [Upload from Google Button](#)
- [Upload from Dropbox](#)

The following enhancements are also included in this release:

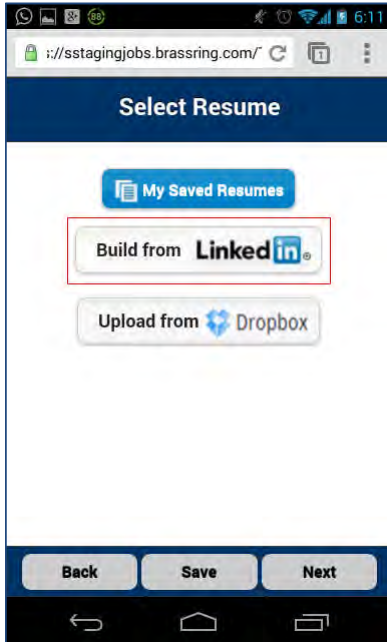
- [Privacy policy pages are mobile-optimized](#)
- [Clients can configure and display their logo on the mobile apply pages](#)
- [Education degree fields](#)
- [GQ Support for Mobile Apply](#)

## Candidate Experience

### New Features

#### Build from LinkedIn

A new “Build from LinkedIn” button, displayed when candidates apply for jobs from their mobile devices, replaces “Apply with LinkedIn.”



When candidates tap this button, an authentication page displays; candidates must provide their LinkedIn credentials and authorize 2x BrassRing to access their LinkedIn profile information.

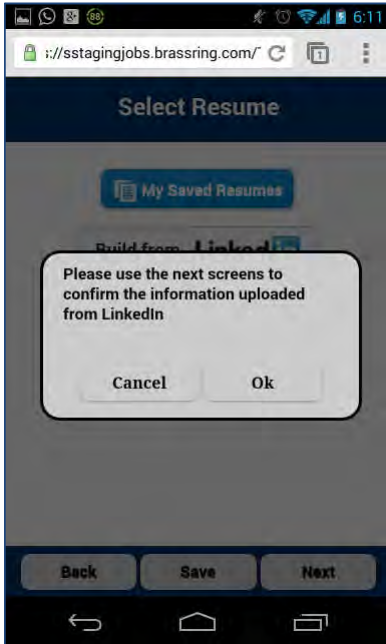


After authentication, the candidate's information is drawn from their LinkedIn profile to their TG profile. Information in Contact, Work and Education tabs is filled using the information from candidate's LinkedIn profile. Candidates verify, make edits if required, and use this information to apply to the job. They see the following message before their TG profile information is displayed for verification:

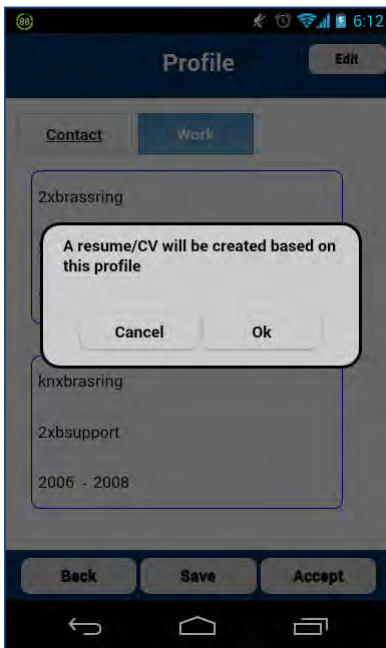
"Please use the next screens to confirm the information uploaded from LinkedIn."

This message is to ensure the candidates' attention to the subsequent profile pages as they are used to create their resumes.



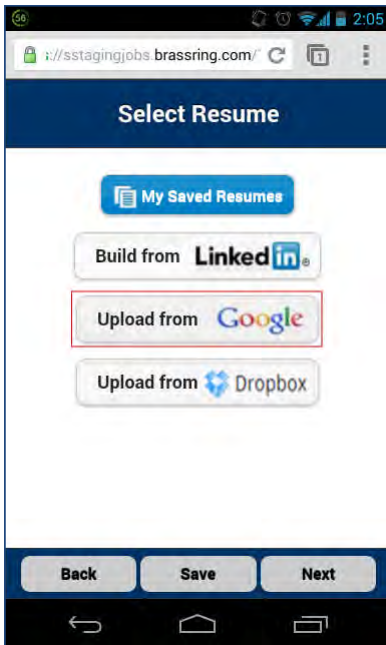


After the candidates verify their information and tap **Accept**, a message is displayed to candidates stating that a resume/CV will be created based on the information that is drawn and verified. Candidates tap **OK** to proceed with this step.

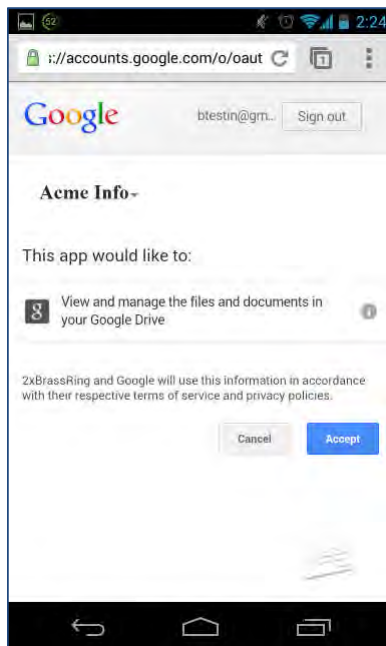
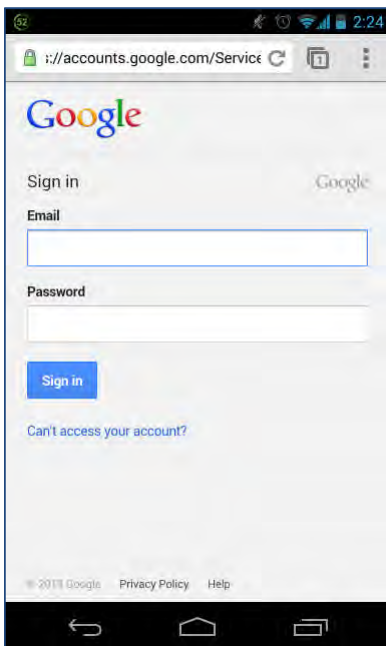


## Upload from Google Button

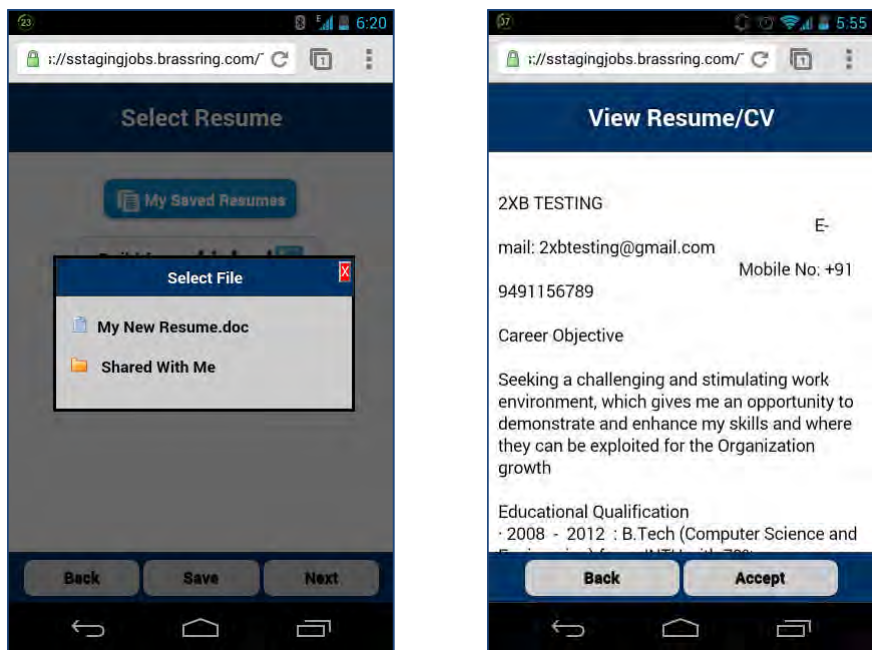
A new button **Upload from Google** is displayed on the Select Resume screen. Using this button, candidates can upload their Resume/CV from their Google Drive.



Uploading needs a one-time authentication and authorization. Candidates provide their Google account credentials on the Google sign-in screen to log in. In the next screen, candidates tap **Accept** and authorize 2x BrassRing to access their Google Drive. Candidates see clients' logo on the 'Authorization' screen if the clients provide their logo while configuring this feature on Google's website.



Candidates can then select a file of supported format for their Resume/CV from Google Drive and upload it on their TG Profile.

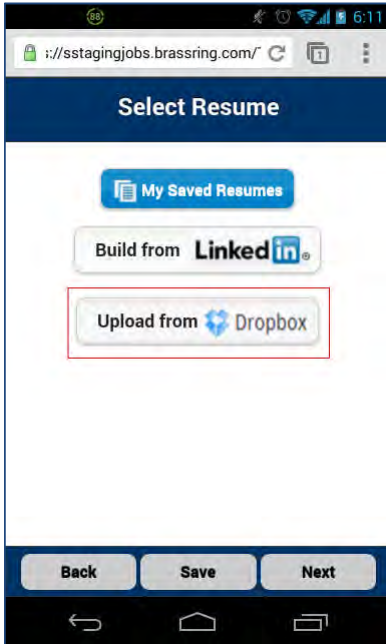


When a file is selected, the preview of the Resume/CV of the candidate is displayed in flat text. However, when the file is uploaded, its original formatting is retained. This file is uploaded when the candidate taps **Accept**. While uploading a file for Resume/CV or a Cover letter, candidates must ensure that the file name does not match an existing file on their TG Profile. An error message is displayed if the name matches an existing file's name.

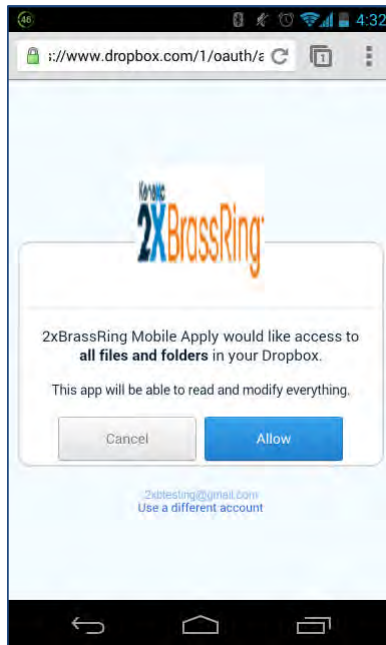
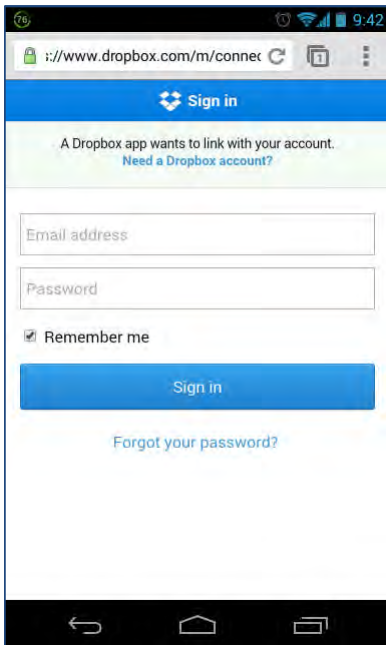
Upload from Google is also available on the Select Cover letter screen. In order to upload a cover letter from their Google drive, candidates follow the same steps that they took for Resume/CV upload.

### Upload from Dropbox

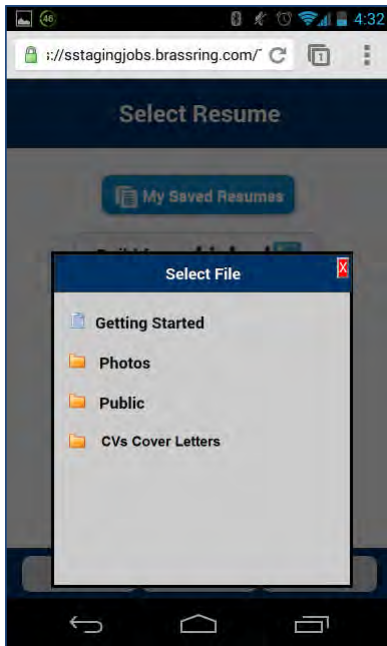
A new button **Upload from Dropbox** is displayed on the Select Resume screen. Using this button, candidates can upload their Resume/CV and Cover letters from their Dropbox accounts.



A one-time authentication and authorization is required to access the files stored on the candidates' Dropbox accounts. Candidates provide their Dropbox credentials to log in. They tap **Allow** in the next screen to authorize 2xBrassRing to access their files for upload. Candidates see client's logo on the 'Authorization' screen if the clients provide their logo while configuring this feature on Dropbox's website.



Candidates can then select a file of supported format for their Resume/CV from Dropbox and upload it on their TG Profile.

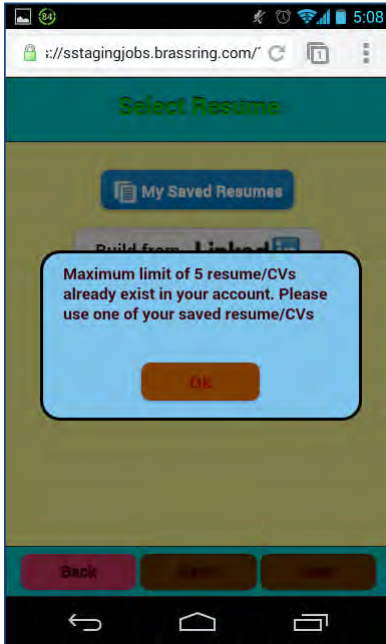


When a file is selected, a preview of the Resume/CV of the candidate is displayed in flat text. However, when the file is uploaded, its original formatting is retained. This file is uploaded when the candidate taps **Accept**. While uploading a file for Resume/CV or a Cover letter, candidates must ensure that the file name does not match an existing file on their TG Profile. An error message is displayed if the name matches an existing file's name.


Upload from Dropbox is also available on the Select Cover letter screen. In order to upload a cover letter from their Dropbox account, candidates follow the same steps that they have taken for Resume/CV upload.

## Recommendations

If the candidate already has uploaded/created five resumes in their TG profile, an error message is displayed stating that the maximum number of resumes/CVs allowed has been reached, and they must use one of their existing resumes. Alternatively, they can go to their desktop Talent Gateway profile and delete one of the existing resumes before uploading a new one.

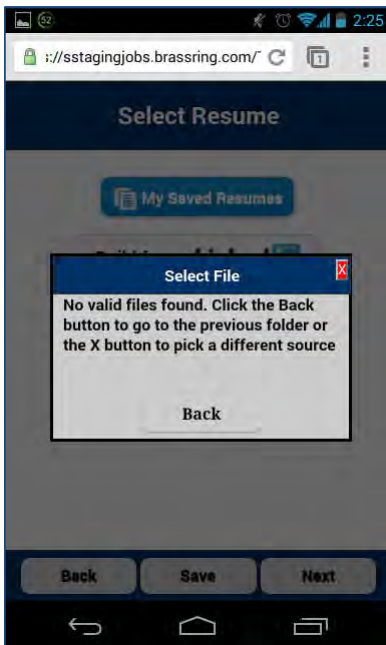


When candidates upload files from either of the cloud-based services, only files with supported file format extensions are displayed. Files in a candidate's Google Drive whose format is not supported, such as MS Excel (.xlsx) or Picture (.jpeg) formats, are not displayed for selection.

 Following is the list of supported formats that can be uploaded: .DOC, .DOCX, .TXT, .PDF, RTF, .HTML, .HTM, .MHT, and .MHTML

If none of the files is of a supported format, an error message is displayed:

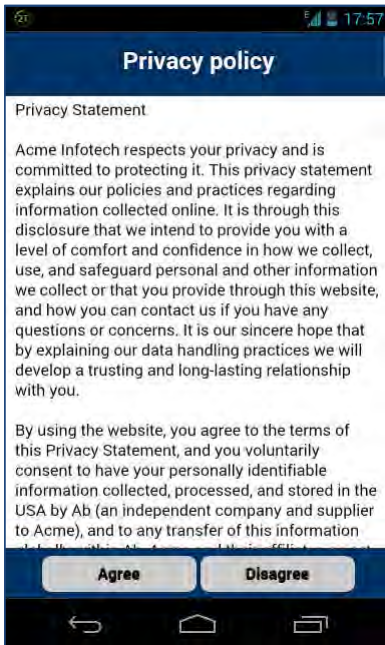
“No valid files found. Click the Back button to go to the previous folder or the X button to pick a different source.”



## Enhancements

### Privacy Pages – Mobile Optimization

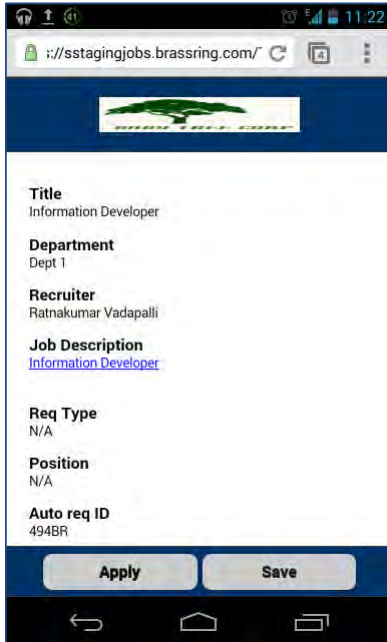
The Privacy pages are now mobile-optimized. Previously, the classic privacy policy page was displayed even when candidates were applying via their mobile devices. In this enhancement, privacy policy pages are mobile-optimized and candidates can go through the client's privacy policy without having to zoom in. They can scroll down the page and read the privacy policy. At the bottom of the privacy policy page, the candidate can opt to either agree or disagree to the privacy policy. If the candidate opts to disagree, they will be directed to the Non-Consent policy page.



In addition to the privacy policy page, if the client has a privacy policy question set up, a mobile optimized privacy policy question page is displayed when the candidates tap 'Register'

### Branding the Job Description page with Client Logo

With this enhancement, clients can display their logo on the Job details page when candidates view job details on mobile devices. A new Talent Gateway setting enables this configuration. The header of the job details page now contains the logo as provided by clients, as show in the following figure.



### Education Fields Enhancement

In line with the desktop Talent Gateways, mobile-optimized TGs now allow candidates to submit for jobs without providing information in the graduation field of the education section. However, when manually adding a degree field on a US English Talent Gateway, the users must still select a degree from the hard-coded list of degrees on mobile-optimized TGs.

### Gateway Questionnaire Support for Mobile Apply

Mobile Apply feature supports Question, Text and Graphic widgets. When a particular requisition is posted with a Gateway Questionnaire (GQ), candidates that apply using mobile devices do not see any difference until they reach profile submission page. After this page, questions are displayed in one question per page format. Any widgets that are not supported by the mobile apply feature are not displayed. If there is only one widget on a page and that widget is not supported, a blank page is displayed on the mobile device.

### Limitations/Known Issues

When candidates apply to a requisition that uses a GQ from a mobile device, if they save the application as a draft from the “Select Resume,” “Select Cover Letter,” or “Profile” screens, they cannot access it using the desktop TG. In order to resolve this situation, the “Save” button on those pages is not displayed for GQ applications only.

WOTC widget is not currently supported on mobile devices.

## How Do Clients Get this Feature?

Features available without any configuration:

- Privacy Policy pages Mobile-optimized
- Education Fields Enhancement

Features available based on new client settings/Talent Gateway settings and/or additional configuration:

- [Build from LinkedIn](#)
- [Upload from Google](#)



- [Upload from Dropbox](#)
- [Client Logo on Job Details page](#) (this can also be done by a certified Workbench Self-Service user)
- [GQ Configuration](#) (Optional)

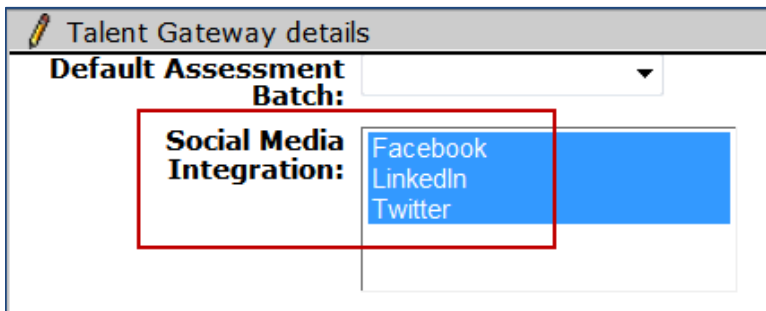
These features are controlled by new client settings. Please contact your Kenexa Support Team for more information about enabling these features.

# Kenexa Tasks

## Build from LinkedIn Configuration

This feature works based on the Social Media Integration of the Talent Gateway. The prerequisites are that the Social Media integration should be enabled and LinkedIn is selected on the TG Configuration page on Workbench.

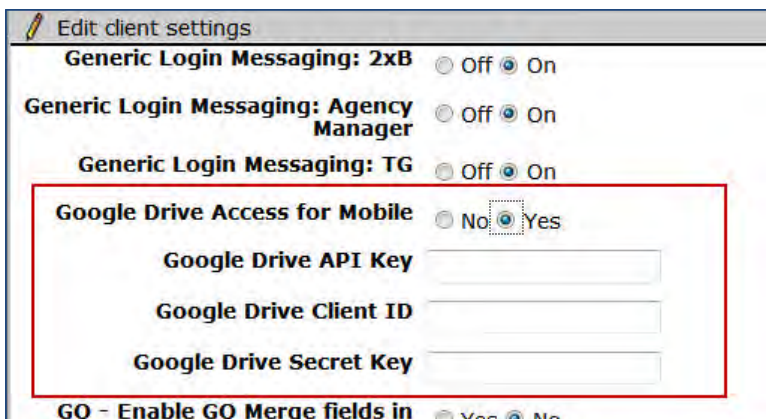
**Workbench Path:** Tools > Talent Gateways > [select TG] > Edit



## Google Drive Configuration

To enable candidates' access to their Google drive when applying via mobile devices, clients must obtain API key, Secret key and Client ID from Google. This information is required to be provided in the Client Settings section of Workbench. Google has a limit on the number of hits that an application can make through their API. Therefore, it is a best practice for each client to have their own API key and Client ID provided by Google to decrease the chances of reaching the daily limit set by Google. In addition, by providing the product logo and a home page URL, clients customize this page to display their logo to enhance candidate experience.

**Workbench Path:** Admin > Manage Clients > Edit Client Settings



Clients need to enable Google Drive API access for each environment separately (one for staging, one for production) by following these steps:

1. Access Google Drive API project creation link: <https://developers.google.com/drive/quickstart-cs>
2. Click [Google APIs Console](#) and log in.
3. Click **Create project**.
4. Activate the status for **Drive API** service.
5. Click **API Access** tab on the Google APIs page.
6. Click **Create an OAuth 2.0 client ID**. A pop up window **Create Client ID** is displayed.
7. Provide information in the following fields: Product Name (mandatory), Product logo (optional) and Home page URL (Optional) on the popup and click **Next**.

8. Select **Web application** for **Application type** and fill the 'Your site or hostname' field with the redirect URL provided by Kenexa for Staging and Production sites respectively:
  - US Staging URL: <https://sstagingjobs.brassring.com/TGWEBHOST/mobile/cscallback.aspx>
  - EU Staging URL: <https://stagingkrb-sjobs.brassring.com/TGWEBHOST/mobile/cscallback.aspx>
  - US Production URL: <https://sjobs.brassring.com/TGWEBHOST/mobile/cscallback.aspx>
  - EU Production URL: <https://krb-sjobs.brassring.com/TGWEBHOST/mobile/cscallback.aspx>
  - China Production URL: <https://krbcn-sjobs.brassring.com/TGWEBHOST/mobile/cscallback.aspx>
9. Client ID, Secret Key, and API Key are created for the Client and are displayed.
10. Make a note of the three details.
11. Ensure that the details are separately noted for the Production and Staging environments.
12. The above process needs to be performed one time each for Staging and Production environments separately.

After enabling the access, client needs to enter the Client ID, Client Secret Key and API key provided by Google Drive API in Workbench. If any of the values provided by the client does not match with the values provided by Google Drive API, then an error message is displayed as opposed to Google authentication pages. Hence, clients need to test it before using this feature in production to ensure that the values provided are correct. These values should be provided in each of the environments separately. Client should use only SSL-encrypted Talent Gateways for mobile apply in order to use the Google Drive feature.

### Dropbox Configuration

To enable candidates' access to their Dropbox accounts when applying via mobile devices, clients can use the Dropbox app created by Kenexa. There is no limit on the number of hits per day at Dropbox. Alternatively, if clients would like to display their branding on the Dropbox authentication page, they must create a Dropbox app of their own.

**Workbench Path:** Admin > Manage Clients > Edit Client Settings

The screenshot shows the 'Edit Client Settings' form with the following sections and options:

- Document templates and blurbs – enable .doc/.docx file usage:**  No  Yes
- Document/email generation – always allow edits:**  No  Yes
- Dropbox Access for Mobile:**  No  Yes
- Dropbox App Key:** [Text input field]
- Dropbox App Secret:** [Text input field]
- E-mail type configuration:**  No  Yes
- Elink approval – Display hyperlink and text:**  No  Yes

Clients that create a Dropbox app of their own must test that app in Staging with at least one user. After testing the App, they need to apply for production status for their App by following the below steps:

1. Go to Dropbox developers page: <https://www.dropbox.com/developers>
2. Click Apps Console hyperlink and enter your Dropbox log in credentials.
3. Enter values for the following fields on the **Create new app** page:
  - For “What type of app do you want to create?” Select Dropbox API app
  - For “What type of data does your app need to store on Dropbox?” Select “Files and datastores”
  - For “Can your app be limited to its own, private folder?” Select “No”
  - For “What type of files does your app need access to?” Select “All file types”

- Enter the name that you would want to give your Dropbox App. You need to enter an appropriate name that matches your company name to get your app approved for production.
4. App key and App secret are created for the App and are displayed.
  5. Upload the logo for the App in the **Icon** field as per your pixel requirement and click **Update**.
  6. Enter the values for App key and App secret in respective client setting fields in Workbench Staging environment.
  7. Test this app with at least one user and then apply with Dropbox for production status using the **Apply for production status** link on the App details page.
  8. While applying for production status, you need to give a detailed description of how your company will use the Dropbox App and a Job Apply URL for the TG configured with Dropbox App in staging for them to test the app. They will not approve the app for production unless these details are provided correctly.

After receiving a confirmation from Dropbox that the app has been upgraded to production status, Kenexa must enter the App Key and App Secret values in the Dropbox App Key and Dropbox App Secret fields in the Client Settings section of Workbench in the Production environment. If any of the values provided by the client do not match with the values provided by Dropbox API, then an error message is displayed as opposed to Dropbox authentication pages. Client should use only SSL-encrypted Talent Gateways for mobile apply in order to use the Dropbox feature.

### Client Logo Configuration

A new Talent Gateway setting **Mobile Logo** is introduced to help clients configure the branding of Job description page on mobile-optimized TGs.

**Workbench Path:** Tools > Talent Gateways > [select TG] > Edit Talent Gateway

The logo should meet the following criteria to be uploaded:

- Logo should be in .GIF format.
- It should be less than 150kb in size.
- It should be of maximum size 200x35 pixels

To view a logo already uploaded, click **See Logo**.

### Gateway Questionnaires (GQs)

Mobile Apply supports a GQ setting, Alternate GQs, for the Mobile Apply workflow that allows a regular TG and the Mobile apply to share a GQ. Clients can use an existing GQ to configure a separate workflow for Mobile Apply. When a GQ is assigned to a req posting, a candidate using Mobile Apply follows the same workflow as if there were no GQ (resume/cover letter/profile source/contact/work and education tabs). When the candidate taps **Accept** on the Profile page, the GQ displays. When the questions are complete, candidate taps **Ok**, **Submit**, and **Done**.



Because Mobile Apply enforces one-question-per-page *only for req posting questions and TG forms*, the recommended practice is to configure the Alternate GQ for Mobile to have question widgets only, with only one question per page.

To select Alternate GQs for the Mobile Apply workflow:

1. **Tools > Gateway Questionnaires**. Create a new questionnaire or edit an existing one.

Field Used to track Complete vs Incomplete Submissions Select  
\*Only available when "Process Incomplete Submission" enabled.

Alternate GQ for mobile None

Save Revert to saved Cancel

2. Select a GQ specific for mobile – it can be the same as the non-mobile GQ for desktop PC users except that it should contain no unsupported widgets (the standard mobile apply flow will do the same work), and should have the question widgets one per page. (**None** uses the same GQ for mobile as for desktop users, and is not recommended).
3. Click **Save**.

# Candidates – Print Talent Record

Users can print multiple items associated with selected candidates' Talent Records, with fewer clicks.

<b>Product</b> RDP 766 Release 13.3	<input checked="" type="checkbox"/> 2x BrassRing
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document sent for each release build.
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic – see details below.

## Feature Description

Printing candidate records and associated items becomes easier with this feature, whose highlights include:

- Users can select one or multiple candidates
- New **“Print Talent Record”** Actions menu item is available on req's candidate results listing and on candidate's Talent Record when accessed from a req folder or panel (that is, there must always be a req relationship for the print action)
- Selections print as a consolidated PDF file, data for each candidate begins on a new page.

## 2xB User Experience

1. Select one or more candidates (up to 100) and click **Print Talent Record** Actions menu item to print one or more items associated with the selected candidates' Talent Records. The action is available on the Talent Record and on the Candidate Results list (when opened from Req panels/folders).

### Talent Record

The screenshot shows a 'Talent Record: Barre, Prai' page. The page includes a header with '733BR: Sales', a candidate profile section with contact details and HR status, and a 'Resume/CV' section. An 'Actions' dropdown menu is open on the right side of the page, listing various actions. The 'Print Talent Record' option is highlighted with a red box. Below the main content, there is a 'Submission History' section with an 'Action Log' table.

Action	Date	Action by	Details	Name/Type	From	To
HR Status - Updated	13-Mar-2013	Howard, Justin		Current Status	0-Filed	Reference Check
Form			Form ID:	Interview		

## Candidate Results

Candidates in: 7089BR : Quality Engineer

Records 1 - 4 of 4 Selected 4 Results Per Page 50

✓	Name	Viewed	Date La	Notes	Forms	Candidate	HR Status	HR Status Da	Commu
✓	<a href="#">Candidate TestOne</a>			+	+	Internal	0-Filed	02-Jul-2013	
✓	<a href="#">Carlin, George</a>					External	0-Filed	02-Jul-2013	
✓	<a href="#">Jones, Nicholas</a>			+		External	Company Not Interested	02-Jul-2013	
✓	<a href="#">Smith, Ralph</a>			+		External	0-Filed	02-Jul-2013	

Actions Filter Display

- Remove from Folder
- Browse Multiple Candidates
- Speed Browse
- Print Resume/CV
- Print Talent Record**
- Export to Excel
- Add/Remove Agency Association
- Update Candidate Type
- Update Status

- A new pop-up window displays, from which you select one or more items for printing among the candidate's profile data and candidate forms. (All items are selected by default. If only one candidate was selected, the name displays in the header.)

**Print Talent Record: ( 3 ) selected candidates**

\*Files to include

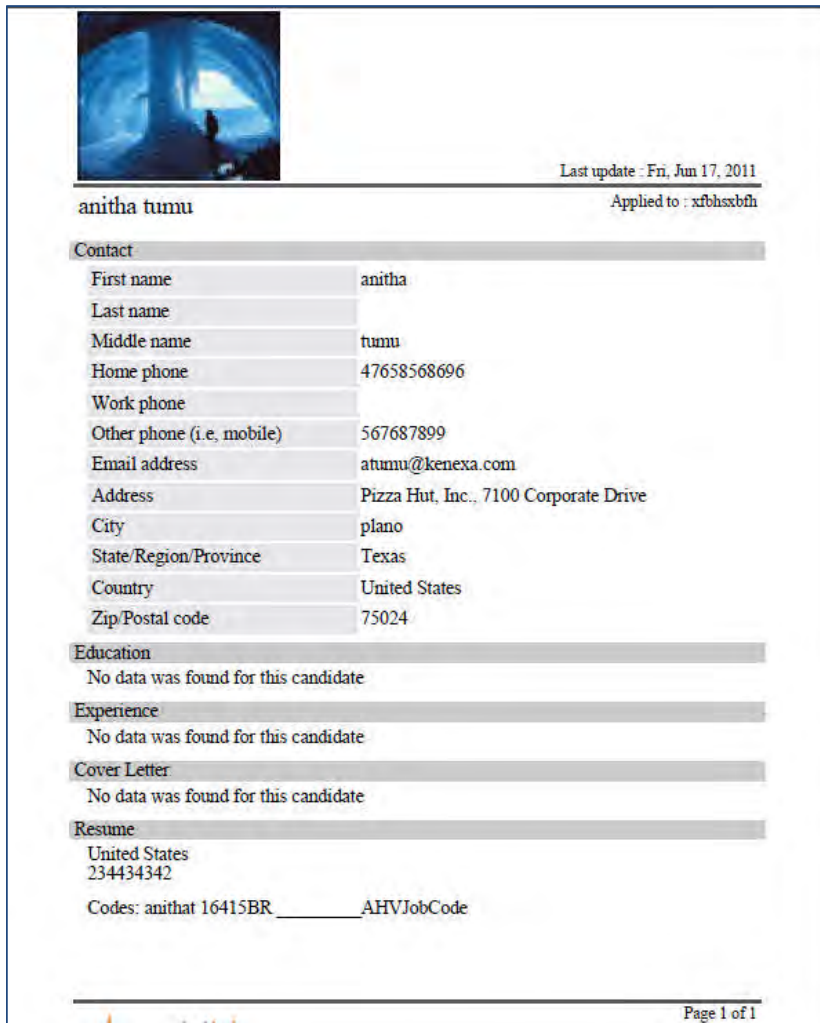
- Contact
- Resume/CV
- Education
- Work History
- Job Response Form
- Candidate Form Name
- Candidate Form Name
- Candidate Form Name

Print Cancel

Items listed include (when present):

- Contact
  - Cover Letter
  - Resume/CV
  - Education
  - Experience
  - Job Response Form – only the most recent form associated with the current req will print.
  - Candidate forms – for multiple per candidate forms (both req specific and general) only the most recent (and req-specific, if a per req form) version of the form will print. For an individual Talent Record, only forms that exist for the selected candidate and which user type has access to view within current req will display.
- Click **"Print"** to generate and display a PDF document that contains information from all the selected items. When there are multiple forms per candidate, the information from the latest form is displayed in the PDF.

## Sample Printed PDF Result



The image shows a sample printed PDF result for a candidate named anitha tumu. The page includes a profile picture, contact information, education, experience, cover letter, and resume details. The data is concatenated across the page, with the next candidate's data starting on a new page.

Last update : Fri, Jun 17, 2011  
Applied to : xfbhsxbfh

**anitha tumu**

**Contact**

First name	anitha
Last name	
Middle name	tumu
Home phone	47658568696
Work phone	
Other phone (i.e. mobile)	567687899
Email address	atumu@kenexa.com
Address	Pizza Hut, Inc., 7100 Corporate Drive
City	plano
State/Region/Province	Texas
Country	United States
Zip/Postal code	75024

**Education**  
No data was found for this candidate

**Experience**  
No data was found for this candidate

**Cover Letter**  
No data was found for this candidate

**Resume**  
United States  
234434342  
Codes: anithat 16415BR \_\_\_\_\_ AHVJobCode

Page 1 of 1

Each candidate has their data concatenated, but the next candidate begins on a new page (so print results can be easily separated by candidate).

**Print Talent Record** action is available to all users who can view candidates; no special privilege is required. However, no data is printed that the user type does not have privilege to view (such as a field or form).

## Limitations and Known Issues

The Print Talent Record action is available only on a req's Candidate Results panel/listing, within req folders, and on candidate's Talent Record when accessed from a req folder or req panel (that is, there must always be a req relationship for the print action). The action is not available on the general Candidate search, Quick search, Candidates > My candidates results pages, nor in working folders.

Data appears in standard format on the PDF; most specific formatting (e.g., enhanced form layout) is ignored.

The process may time out if the system needs longer than 5-10 minutes to gather too large an amount of data for too large a number of candidates, and render the PDF. This could occur, for example, when the user selects 100 candidates with all data, including custom forms. If that happens, an error will appear on the print selection screen asking the user to select less data. Selecting fewer candidates is another option if this occurs.



## How Do Clients Get this Feature?

This feature is available automatically without configuration.

# Codes – Job and Req Codes Transfer

A new client setting allows organizations to copy the Req codes and Job codes associated with a candidate when 2xB users move, copy, or file the candidate to a req.

<b>Product</b> LDP 159 Release 13.3	<input checked="" type="checkbox"/> 2x BrassRing
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.

## Feature Description

A new client setting allows organizations to copy the Req codes and Job codes associated with a candidate when 2xB users move, copy, or file the candidate to a req. Agency codes and any other codes that are associated with the respective submission ID also get transferred. This allows Data Insight reports to capture and display agency codes correctly in *both* Codes and Last Codes fields.

The new setting is set to No by default, which maintains the current behavior, where codes will not be copied/transferred with the candidate to the respective submission.

The other options are to copy the codes either:

- to latest/current submission (associated codes are copied to the latest/current submission and “LastCodes” column on Talent Record is updated to reflect the Move/ Copy/ File to Req action)

OR-

- To source submission for 2xB Move/ Copy/ File to Req actions (associated codes are copied to the source submission and “LastCodes” column is *not* updated to reflect the Move/ Copy/ File Req action).

## Example

- Candidate “ABC” applies to Req 10BR, then later to Req 14BR, so has two submissions created in 2xB.
  - 10BR submission has codes: 10BR, Jobcode1, Agency 11
  - 14BR submission has codes: 14BR, Jobcode3, Agency 33  
Talent Record shows this set as the LastCodes
- Recruiter now moves this candidate from 10BR to 16BR, which is created from Jobcode5.

If setting = “**To Current Submission**,” codes associated with 16BR are copied to 14BR submission.

- 14BR submission code set (previously 14BR, Jobcode3, Agency 33) becomes: 14BR, Jobcode3, Agency 33, 16BR, Jobcode5  
Talent Record now shows this expanded set as LastCodes: 14BR, Jobcode3, Agency 33, 16BR, Jobcode5.

If setting = “**To Source Submission**,” codes associated with 16BR are copied to 10BR submission.

- 10BR submission code set (previously 10BR, Jobcode1, Agency 11) becomes: 10BR, Jobcode1, Agency 11, 16BR, Jobcode5  
Talent Record LastCodes for “ABC” are not affected and still show the set from the original source submission: 14BR, Jobcode3, Agency 33.

## How Do Clients Get this Feature?

This feature is controlled by a new client setting. Please contact your Kenexa Support Team for more information about enabling this feature.

# Kenexa Tasks

## Workbench

New WB client setting **Job/ Req codes copied when Move / Copy/ File to Req**

Job Posting Removal Time (Default) 12:00 AM

Job Posting Removal Time Zone (Default) Eastern Time (US & Canada)

**Job/Req codes copied when Move/ Copy/ File to Req**  No  To Current Submission  To Source Submission

Limit # of candidates allowed to be manual filed/moved/copied into req folder  No  Yes

Lockout Period 2xB N/A

Lockout Period Agency N/A

Lockout Period Gateway N/A

LockoutPeriod N/A

Log HR status change  No  Yes

Log req status change  No  Yes

Save Revert to saved Cancel

Options are:

- **No** (default) – no change in existing functionality
- **To Current Submission**

Associated codes are copied to the latest/current submission during 2xB Move/ Copy/ File to Req actions.

The “LastCodes” column available on Talent Record is updated to reflect this Move/ Copy/ File to Req action.

- **To Source Submission**

Associated codes are copied to the source submission during 2xB Move/ Copy/ File to Req actions.

The “LastCodes” column is *not* updated to reflect this Move/ Copy/ File Req action.

When you toggle from “None” to either “Current” or “Source” submission, the existing saved codes are not updated, but changes are reflected in the succeeding “Move/ Copy/ File to Req” actions.

# Communication History – Retain Candidate Email Address

This feature ensures that the candidate email address or phone number that was used to communicate with the candidate is retained in the communications history, regardless of any updates made later by the candidate or a user.

<b>Product</b> RDP 675 Release 13.3	<input checked="" type="checkbox"/> 2x BrassRing
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document sent for each release build.
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic – see details below.

## Feature Description

### Background:

When a candidate communication is sent via the 2xB system using email or Short Messaging Service (SMS text message), a row of information is added to the candidate's record, including recipient email address or phone number to which the SMS was sent. If candidates updated their email address or phone number via their Talent Gateway profile, or a user updated the same on the candidates' Talent Record, the information that was saved earlier was replaced with the current contact information. The update, therefore, makes the information for previous communications inaccurate.

Clients have an obligation to maintain accurate candidate records. 2x BrassRing users and candidates need to know where a previous communication was actually sent.

### Feature

This feature ensures that the actual email address or phone number information used to communicate with candidates is retained on record even after that information is updated in other parts of the system. Following are the communications from 2x BrassRing, in which candidate email address or phone number are recorded and retained.

- Manually-sent emails (via Send candidate communication)
- Ad-hoc emails (Send ad-hoc email)
- Auto-Send emails (Automation Manager/RAM-triggered email generated from an email template as a result of a configured event happening)
- Forms Auto-Send emails (Automation Manager-triggered email generated from a Req email template as a result of the configured event happening).
- Ad-hoc SMS messages (Send ad-hoc SMS) – the mobile phone number captured in "Other Phone number" field of the TG, which is used to send SMS to the candidates, is recorded and retained.

A new column **Sent To** is added to the Communication History section of the Send Communications screen. This column displays the name, email address, or phone number to which the communications were sent.

[Help](#)

Send communication

Communications template: Onboarding Letter Go  
Selection details

Letter template: MyLetter Go  
Selection details

Document packet template: Rama\_Docpack temp Go

**Communication History**

Date sent	Folder type	Req ID	Folder	Communication	Sent to	Type	Sent by	Status
07-Jun-2013	📁	2868R	Assistant Engineer Software	<a href="#">Your Interview with the Director</a>	ramuk, antar(2xbtesting@gmail.com)	Communications - Email	Vadapalli, Ratnakumar (1217)	Sent
07-Jun-2013	📁	2868R	Assistant Engineer Software	Onboarding Letter	ramuk, antar(2xbtesting@gmail.com)	Communications - Email	Vadapalli, Ratnakumar (1217)	Sent
07-Jun-2013	📁	2868R	Assistant Engineer Software	<a href="#">Interview Invitation_RK</a>	ramuk, antar(2xbtesting@gmail.com)	Communications - Email	Vadapalli, Ratnakumar (1217)	Sent
22-Mar-2013	📁		Vadapalli,Ratnakumar	Offer Letter	ramuk, antar(2xbtesting@gmail.com)	Letter	Vadapalli, Ratnakumar (1217)	Sent

The Action Log on the candidate Talent Record has the “To” column in which the email address or the SMS that is used to send candidate communication is recorded. From the following figure, you can observe that, though the email address is updated and displayed in the Contact Details section of the Talent Record, the “To” column displays the email address to which emails were actually sent earlier.

**Talent Record: ramuk, antar** Actions

**2868R: Assistant Engineer Software**

Social Networks: [LinkedIn](#) [Facebook](#) [Twitter](#)  
 Candidate Type: **External**  
 HR Status: [In Process - Recruit - 1](#)  
 HR status date: 27-Dec-2012  
 HR status updated by: Vadapalli, Ratnakumar (1217)

Notes: [Add/View](#)  
 Forms: [Add/View](#)  
 Communications: [Send/View](#)  
 Attachments: [Add/View](#)

Viewed (this req): 07-Jun-2013  
 Last viewed (global): 07-Jun-2013; 2868R  
 Last viewed (global) by: Vadapalli, Ratnakumar (1217)  
 Original date loaded: 05-Oct-2012

Employer: [Zelazong](#)  
 Position held: [Zel Tester](#)

**Contact Details** | Resume/CV | Cover Letter | Experience/Education

antar ramuk  
 412-81  
 ynohc bh  
 Vadapallam, Andhra Pradesh 530045  
 India

[ramuk@gmail.com](#) → **ramuk@gmail.com**

Home Phone: +913052891  
 Other Phone: 8341300829

**To**

ramuk, antar(2xbtesting@gmail.com)  
 ramuk, antar(2xbtesting@gmail.com)  
 ramuk, antar(2xbtesting@gmail.com)

**Submission History** | **Action Log**

Action	Date	Action by	Details	Name/Type	From	To	Folder
Communication - Email	07-Jun-2013	Vadapalli, Ratnakumar (1217)	Status: Sent	Ad hoc : <a href="#">Your Interview with the Director</a>	Vadapalli, Ratnakumar (1217)	ramuk, antar(2xbtesting@gmail.com)	2868R: Assistant Engineer Software
Communication - Email	07-Jun-2013	Vadapalli, Ratnakumar (1217)	Status: Sent	Onboarding Letter	Vadapalli, Ratnakumar (1217)	ramuk, antar(2xbtesting@gmail.com)	2868R: Assistant Engineer Software
Communication - Email	07-Jun-2013	Vadapalli, Ratnakumar (1217)	Status: Sent	<a href="#">Interview Invitation_RK</a>	Vadapalli, Ratnakumar (1217)	ramuk, antar(2xbtesting@gmail.com)	2868R: Assistant Engineer Software
HR Status - Updated	03-May-2013	Vadapalli, Ratnakumar (1217)		Current Status	0-Filed	ResumeScreen	4628R: Payment Specialist
Form Added	03-May-2013	Submission, System ()	Form ID: 68384	KAS Assessment			4628R: Payment Specialist
Form Added	03-May-2013	Submission, System ()	Form ID: 68383	<a href="#">Talent Gateway One place for opportunity</a>			4628R: Payment Specialist
HR Status - Updated	03-May-2013	Submission, System ()		Status History	0-Filed		4628R: Payment Specialist
Added to Folder	03-May-2013	Submission, System ()			0-Filed		4628R: Payment Specialist
Form Added	02-May-2013	Submission, System ()	Form ID: 68371	KAS Assessment			4378R: Software Engineer Senior
Form Added	02-May-2013	Submission, System ()	Form ID: 68370	<a href="#">Talent Gateway One place for opportunity</a>			

## How Do Clients Get this Feature?

This feature is available automatically without configuration.

### 2x BrassRing Users

Users with user type privileges **Candidates – send candidate email** and **Candidates – send candidate SMS message** checked see this feature.

# Communications – Candidate Preferred Email Format

With this feature, candidates can choose the type of email format they receive: text or HTML format.

<b>Product</b> RDP 726 Release 13.3	<input checked="" type="checkbox"/> Workbench Self-Service <input checked="" type="checkbox"/> Talent Gateways
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.

## Feature Description

This feature helps clients to capture the email format preference of candidates so that email can be sent to them in the format of their choice. The preferred format is used for emails that are sent by 2xB users using Communications templates and Send candidate ad-hoc email action.

Candidates record their email format preference in the Contact Details section of their Talent Gateway profile. 2xB users will see the preference indicated on the Contact Details tab of the Talent Record and on the Edit candidate overview pages. The default format is set to HTML.

## Limitations and Known Issues

Even if a candidate prefers plain text format email, any emails sent to that candidate are stored in HTML format in the Communication History of 2xB.

## How Do Clients Get this Feature?


This feature is controlled by a new client setting. Please contact your Kenexa Support Team for more information about enabling this feature.

## 2x BrassRing Users

2xB users that access candidates' Talent Records now see an email format indicator in the Contact Details tab next to the candidate's email address.

The screenshot displays a Talent Record for 'ramuk, antar'. It includes a navigation bar with 'Contact Details' selected, and tabs for 'Resume/CV', 'Cover Letter', and 'Experience/Education'. The 'Contact Details' section shows the candidate's language as English (US), their name 'antar ramuk', address '412-81 ynoc bh viziagapatam, Andhra Pradesh 530045 India', and email '2xbtesting@gmail.com' with a star icon and 'HTML format' label. Other contact information includes 'Home Phone: +2023052891' and 'Other Phone: +918464974329'. Below this is a table with columns for 'Action', 'Date', 'Action by', 'Details', and 'Name/Type'.

Similarly, users see an email format indicator next to the email address in the Edit candidate window.

Address summary	
*First name	antar
*Last name	ramuk
Middle name	
Address1	412-81
Address2	ynoloc bh
City	viziagapatam
State	Andhra Pradesh ▾
Zip/Postal code	530045
Language	English (US)
Country	India
	<i>Check to refresh the State field</i> <input checked="" type="checkbox"/>
Home phone	+2023052891
Work phone	
Other phone	+918464974329
Work start year	
E-mail	2xbttesting@gmail.com
	HTML 
Homepage	



Existing candidates see the options to select email preference when they log back in and edit their contact details on their Talent Gateway profile.

# Kenexa Tasks

## Workbench

Configure the WB client setting **Candidate communications preference**.

WB Path: Admin > Manage Clients > Edit client settings

**Edit client settings**

**Bulk print enabled**  No  Yes  Yes with letter templates

**ByPass ClosedLogic when Updating HRStatus in RAM**  No  Yes

**Bypass RTR for candidate form approval**  No  Yes

**Candidate communication preference**

- Email format - HTML
- SMS
- Email format - text

**Candidate portal**  No  Yes

**Candidate Portal - Password for** Home phone

- **Email format – text**  
New option, unchecked by default. Check to display email format preference functionality to candidates on the TG; also enables the preference indicator on the Talent Record.
- **Email format – HTML**  
Existing option, indicates no candidate preference functionality. It represents the system default for sending email and cannot be unchecked
- **SMS**  
Existing option available for clients using SMS messaging to communicate with candidates (client setting “SMS messaging – enable” is set). This setting affects functionality pertaining to candidate preference for SMS vs. email.

Unchecking “Email format – text” later will not turn off all evidence of the option. After the option is unchecked, the following happens:

- On Talent Gateways, the settings to capture email format preference will no longer be visible, so that email format preference cannot be captured.
- Candidates creating a new account will always have a preference of 'HTML format' and no other choice.
- Candidates who previously selected text as their format will not be able to change that preference; they will continue to receive emails in text format.
- In 2xB, the yellow stars indicating preference will continue to display in the 'Candidate Details' section of the Talent Record and on the 'Edit candidate overview' page. For new candidates registering after the option is turned off, the yellow star will always display beside 'HTML format'.

To completely disable the email format preference functionality going forward, clients must log a maintenance ticket.”



# Communications – Document Packet Ordering

An enhancement on the Document Packet (to Candidate page) now displays the attachments list in the “Upload attachments from Talent Record” box with the most-recently added document at the top of the list.

<b>Product</b>	<input checked="" type="checkbox"/> 2x BrassRing
<b>RDP 688 Release 13.2</b>	<input checked="" type="checkbox"/> Talent Gateways
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document sent for each release build.
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic – see details below.

## Feature Description

Previously, when 2xB users created a document packet to post to the Candidate portal, the PDF documents that appeared in the "Upload attachments from Talent Record" list box were sorted by "Date added" in ascending order, oldest document at the top. This enhancement now displays the list sorted by "Date added" in descending order, with the most recently-added document at the top of the list.

## 2xB User Experience

2xB users must have Document Packet user privileges to access this feature. The workflow for this feature is as follows:

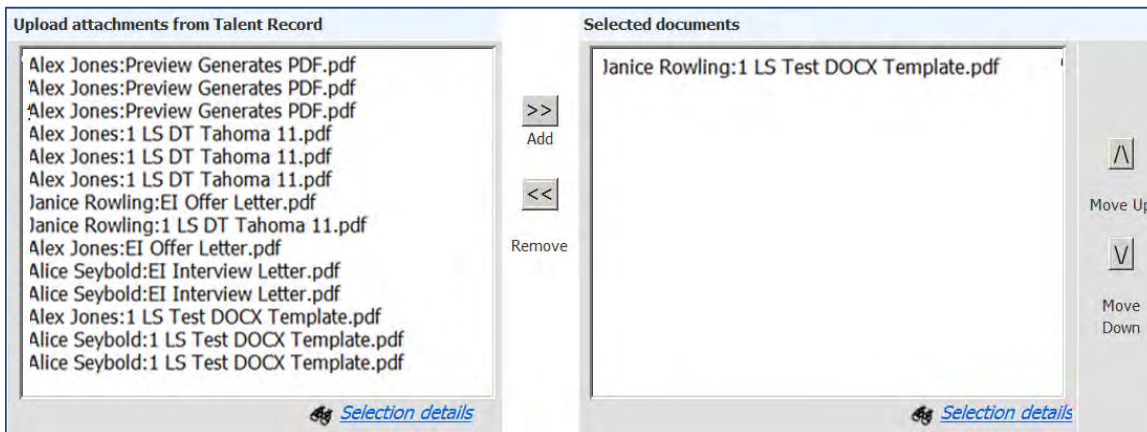
1. Select candidate and clicks **Action > Send Candidate Communication**.

The “Document packet (to candidate portal)” page opens.

The “Upload attachments from Talent Record” box is populated with the list of PDF documents generated through the “Create document” workflow and stored on the attachments grid of the Talent Record.

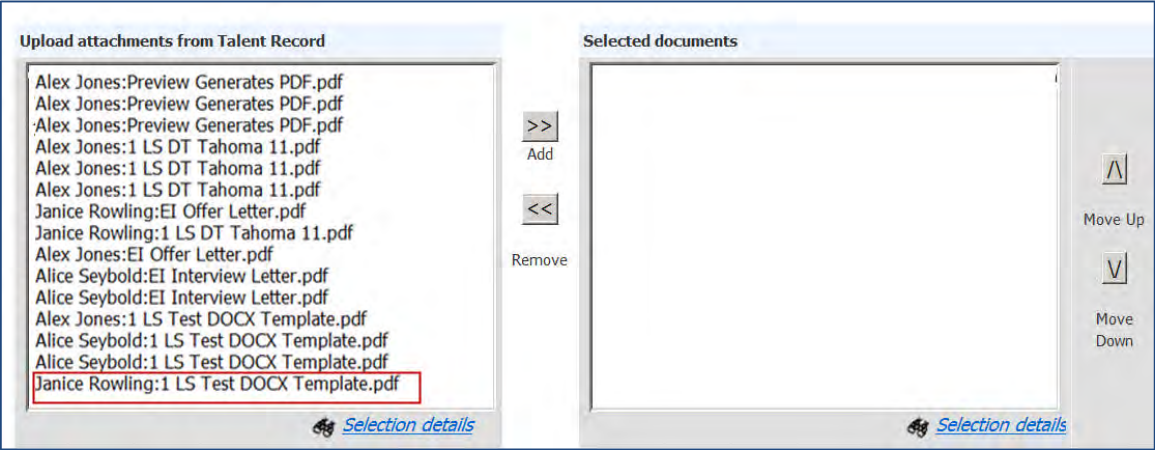
The list of documents displays in descending order by Date Added with the most recently generate/uploaded document at the top of the list. The document format for each listed document is:

*Candidate name: Name of Document.*

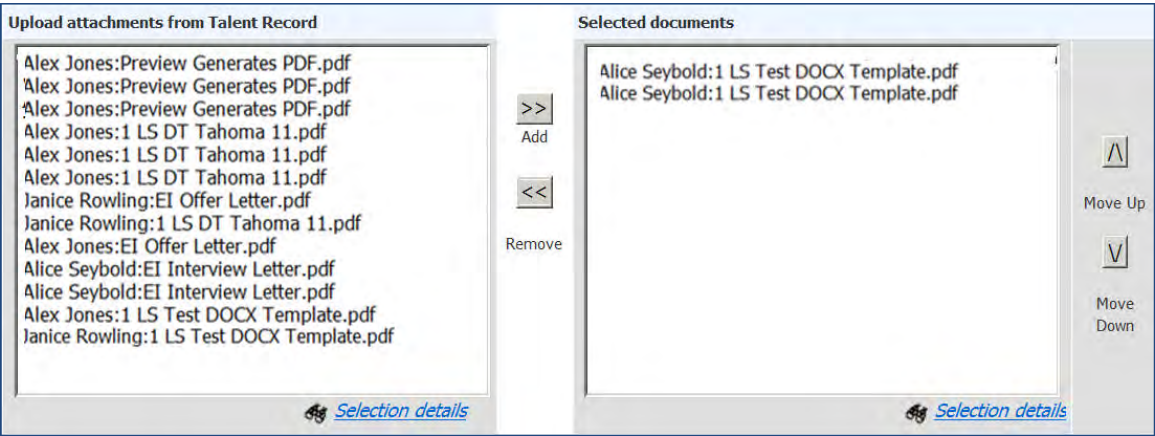


The following is Existing Functionality

2. (Optional) Select and remove documents from the **Selected documents** list box using the **Remove** button. The removed document displays at the bottom of the list in Upload attachments from Talent Record box.



3. Select documents from the **Upload attachments from Talent Record** box to Selected documents by clicking **Add**. You can also use the Move Up and Move Down arrows to change the order of the documents in the Selected document list box.



- 4. Complete all required fields in the Document packet (to candidate portal) page.
- 5. Click **Post to Candidate Portal**.

### How Do Clients Get this Feature?

This feature is available automatically without configuration. 2xB users must have Document Packet User Privileges enabled to access this feature.

# Communications – Email Margin Settings

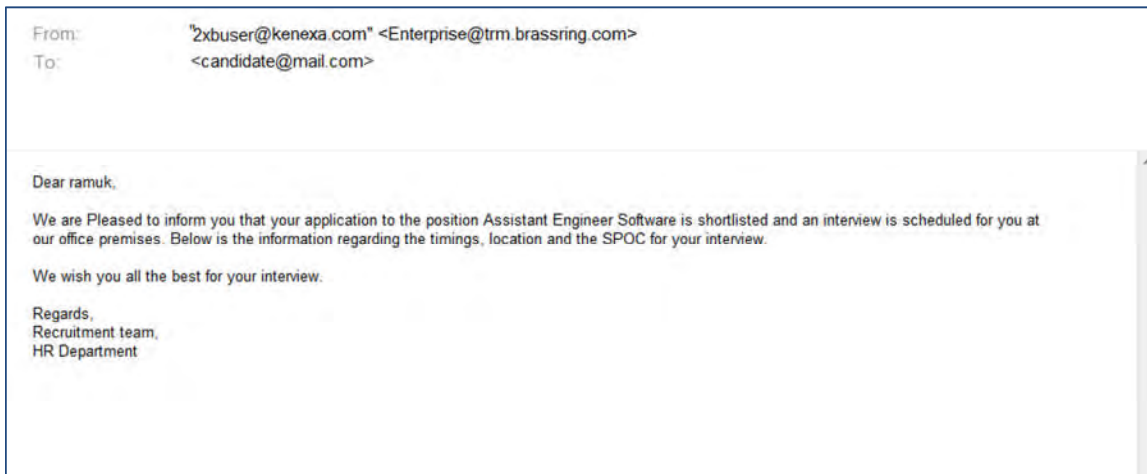
Candidate email communications in 2xB now have enhanced margin capability. Communication template administrators can make changes to the top, bottom, right, and left margins of the emails sent to candidates via 2xB.

<b>Product</b> RDP 672 Release 13.2	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Other
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document sent for each release build.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic – see details below.	

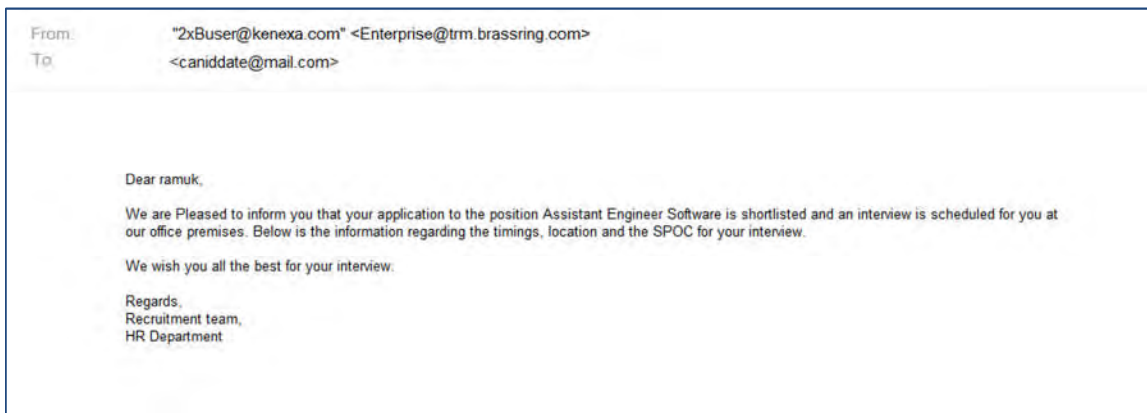
## Feature Description

Candidate communications based on email templates now use page margins on the top, bottom, left, and right of the email. This gives more control to administrators over how email communications are formatted. Wider margins can improve readability for candidates in the email communications they receive from recruiters.

The first of the following figures displays an email received by a candidate with NO margins set in the template used to send the communication. There is little space to the left and at the top of the email.



The second figure displays an email with margins set in the communication template. Ample space appears to the left of the email body text, enhancing the formatting.



## Limitations and Known Issues

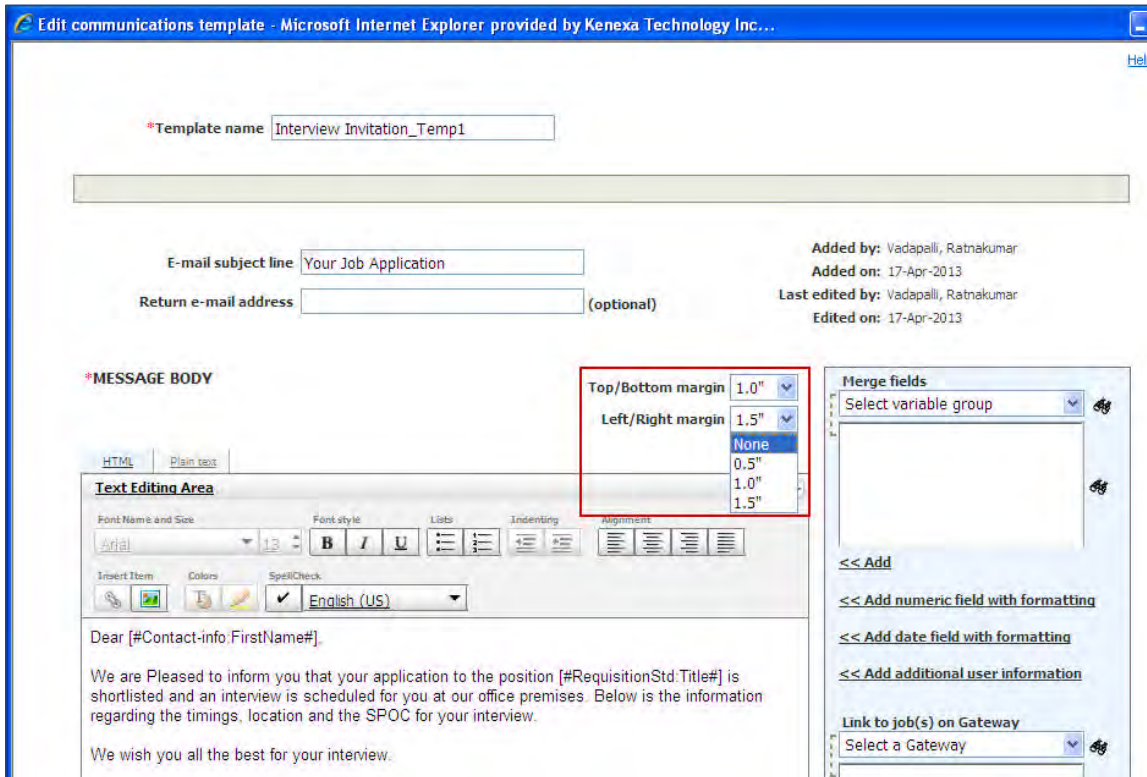
- The margins set using this feature are seen when the email is received by a candidate at a mail client like MS Outlook or Lotus Notes. However, the margins are not displayed when emails are received using web based mails.
- Settable margins are not available for system email templates.

## 2x BrassRing Admin/Admin+ Users

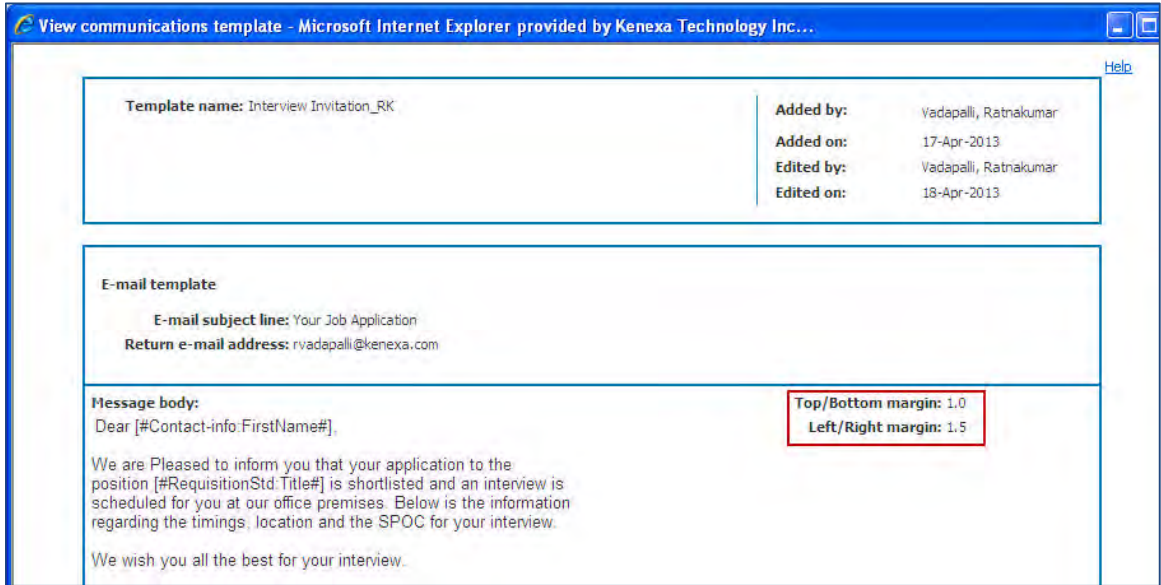
2xB administrators set the margin width from the available options while adding or editing a communication template. There are two dropdown boxes for margin settings. One dropdown box is used for setting margin width at the top and bottom of the email and the other dropdown box is used for setting margin width at the left and right of the email body.

Path: Admin > Communications > Add Communication template

By default, the margin width for both boxes is set to “None”. The width options available are 0.5 inch, 1.0 inch and 1.5 inch.



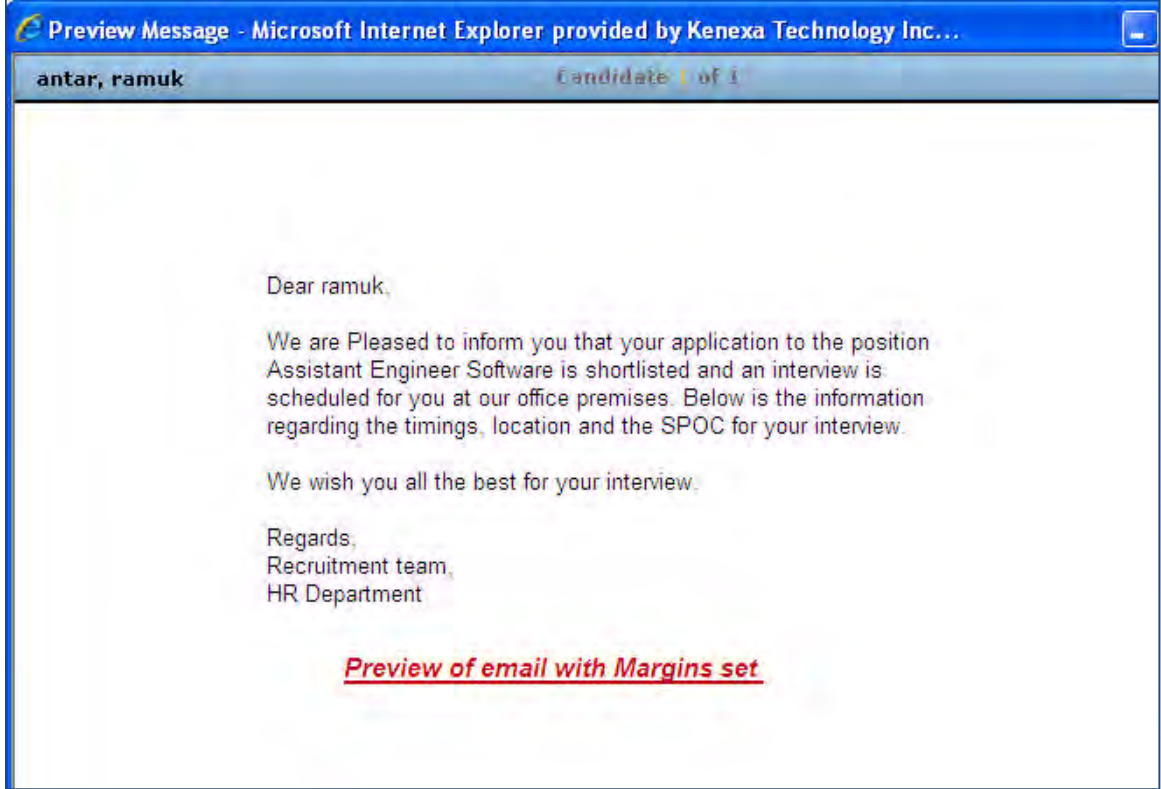
Administrators can find the width selected for a communication template by opening the “View Communications template” page or the “Delete Email template” page.



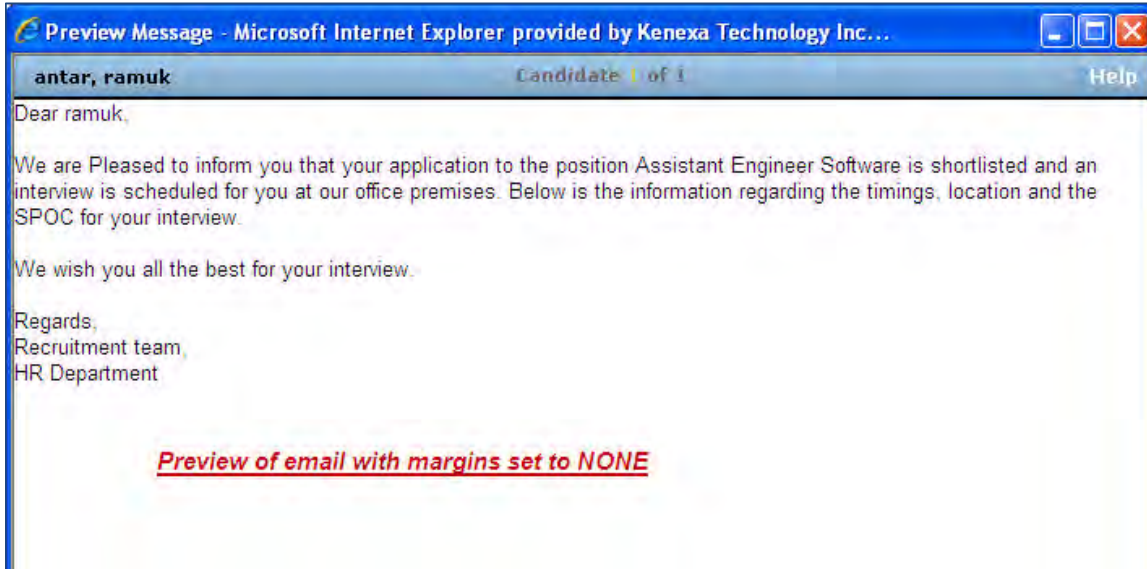
### 2x BrassRing Users

This feature is available for 2xB users who have the privileges to send candidate communications.

When users send emails to candidates using templates with enhanced margins, they can preview the enhancement to the margins. Below figure is a preview of the email using a template with margins.



Below figure displays the preview of an email using a template where margins are set to “None”.



## How Do Clients Get this Feature?

This feature is available automatically without configuration.

# Communications – Search and Filter

2xB Administrators can now search by name for all communication templates from their respective administration pages.

<b>Product</b> LDP144 Release 13.3	<input checked="" type="checkbox"/> 2x BrassRing
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document sent for each release build.
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic – see details below.

## Feature Description

With this feature, 2xB Communication templates become searchable. Admin users can enter the name of the template they want to find into a new text box named “Search”. They can also filter the list by different options and thereby narrow the search. Below is the list of the templates that have the new options available.

- Communication templates
- Document templates
- Blurbs
- Document packet templates
- System email templates

Select	Blurb name	Category	Conditional?	Created by	Date last modified	View blurb	Edit	Deactivate	Delete
<input type="radio"/>	00 YUI Blurb formatting Save as new		No	Beltchev, Nadia	28-Mar-2013				
<input type="radio"/>	00 YUI Blurb formatting Save as new (2)		No	Beltchev, Nadia	11-Feb-2013				
<input type="radio"/>	00 YUI blurb no format Save as new		No	Beltchev, Nadia	08-Feb-2013				
<input type="radio"/>	000 YUI blurb no format		No	Beltchev, Nadia	08-Feb-2013				
<input type="radio"/>	000 YUI Add blurb w format		No	Beltchev, Nadia	11-Apr-2012				
<input type="radio"/>	000blurbagency		No	Beltchev, Nadia	12-Jan-2012				
<input type="radio"/>	000BlurbImageFCK		No	Beltchev, Nadia	06-Oct-2011				

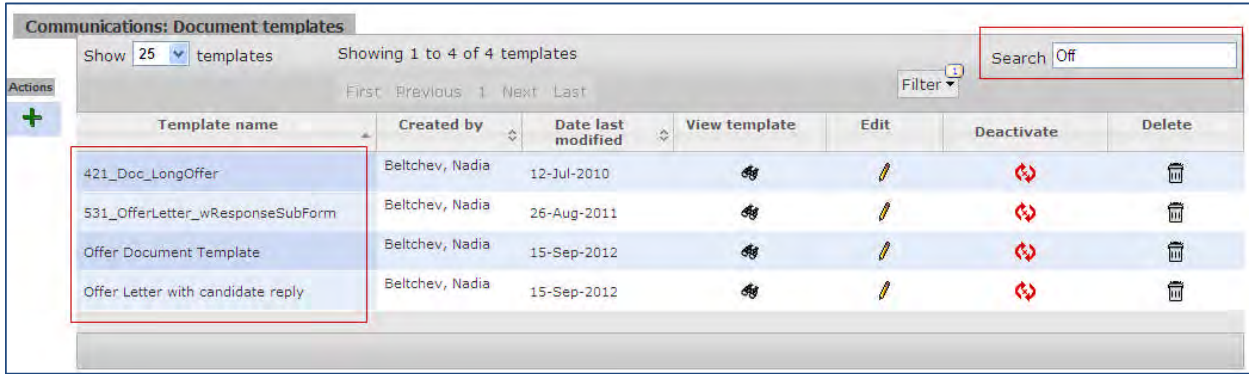
**Before this change:** Whether it was a blurb or a document template or a communication template that a 2xB admin user wanted to view or edit, they had to browse through all the pages listing the templates. Sorting the list in alphabetical order provided the only way to lessen the number of pages through which they might have to browse to find the required template.

### Grid Header

A new grid header appears on the template/blurb administration page. With the new Search and Filter functions, the grid holds the pagination widget, and the drop-down from which users can select the number of templates/blurbs to be displayed per page. This gives a new look and better control to the admin user on the template/blurb administration page.

### Quick Search based on Text

As you enter a text string into Search, the list of templates or blurbs displays only those that have the same text in their names. From the following figure, you can observe that when the user entered “Off” in Search, only those templates that have the string “Off” in their names are displayed in the list.



## Filtering

Filter the list based on several criteria like active, inactive, created by or modified by the user, etc. The filter for blurbs includes a few more options than the filter for communication/document templates.

- **Active** – shows all templates/blurbs that are active. This is selected by default.
- **Inactive** – shows all templates/blurbs that are inactive.
- **Templates/Blurbs I created** – shows all templates/ blurbs that the *logged-in user* has *created*.
- **Templates/Blurbs I updated** – shows all templates/blurbs that the *logged-in user* has *modified*.
- **Conditional** – this filter is available only for blurbs. This filters and shows only those blurbs that meet the user selected Conditional criteria (Yes or No).
- **Category** – this filter is available only for blurbs. Users can select a blurb category from the drop-down list.

The template/blurb grid refreshes each time a new filter is selected, and the grid is sorted by current sort that the user has selected.

- Multiple filters can be selected simultaneously.
- Combination of the filter results will be displayed.



**Note:** The Filter displays a digit as super script that denotes the number of filters applied in that grid. By default, this is 1, since “Active” is set by default.

Following figure displays the filter options on the blurb administration page:





Following figure displays the filter options on the Document/Communication template administration page:



The filter options are similar for Communication templates, Document templates, Document packet templates, System email templates.

## 2x BrassRing Admin/Admin+ Users

For Communication template administration,

2xB Path: **Admin > Communications > Communication templates**

For Document template administration,

2xB Path: **Admin > Communications > Document templates**

For Document packet template administration,

2xB Path: **Admin > Communications > Document Packet templates**

For Blurb administration,

2xB Path: **Admin > Communications > Blurbs**

For System email template administration,

2xB Path: **Admin > Communications > System email templates**

## Limitations and Known Issues

- Batch letters/Letter templates and Numbering formats do not have this feature.
- Search is limited to the name of the template/blurb. Search cannot be performed based on the text in the body of the template/blurb.

## How Do Clients Get this Feature?

This feature is available automatically without configuration. Users with user type privileges to add, view or modify blurbs, communication templates, document templates, system email templates, document packet templates, can view this feature. This enhancement is available to all 2xB admin users that have access to blurbs, communication templates, document templates, system email templates, document packet templates.

# Data Insight Tool – Evergreen Reqs

The Evergreen Requisition checkbox (on Add new req page) has been replaced by a Yes/No single-select field. This allows Data Insight users to select either a **Yes** or **No** option to report on evergreen reqs or to exclude them from a report.

<b>Product</b> RDP 733 Release 13.3 For LDP 091	<input checked="" type="checkbox"/> 2x BrassRing <input checked="" type="checkbox"/> Workbench Self-Service	<input checked="" type="checkbox"/> Data Insight Tool
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document sent for each release build.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic – see details below.	

## Feature Description

Enabling the **Evergreen Req** client setting automatically creates a new custom req field, **Evergreen Requisition**. The Yes/No single-select field can be added to all req forms from which evergreen reqs can be created. **Yes** indicates a specific req is to be treated as an evergreen req (No is the default). Once set to Yes, the field becomes read-only for all users.

You can also report on that field by req in Data Insight. It is available in the trees for the Filter and Output Worksheets under **Requisitions > Custom > Evergreen Requisition** (as for all custom req fields, if it is on more than one req it will also display under **Requisitions > Shared > Evergreen Requisition**). The field now includes both “Yes” and “No” values as options in the filter.

The image shows two screenshots from the Template Workshop interface. The top screenshot is titled "Filter Selection Tool" and contains a list of filters with checkboxes. The "Evergreen Requisition" filter is highlighted with a red box. Below the list is an "Add to Worksheet" button. The bottom screenshot shows a table with columns for "Filter" and "Criteria". The "Evergreen Requisition" filter is selected, and a red arrow points to a green checkmark in the "Criteria" column, indicating that the filter is active.

To report on evergreen reqs only:

1. Select the custom field for the Filter Worksheet.
2. Click the green arrow and select the **Yes** option.

To exclude evergreen reqs from a report:

1. Select Evergreen Requisition on the Output Worksheet. This adds the column to the report output.
2. Click the green arrow and select the **No** option (only reqs that are NOT evergreen reqs appear on the report output).

## How Do Clients Get this Feature?

The Evergreen Req feature is controlled by the “**Evergreen Req (extended posting and archiving)**” client setting. This change from a checkbox to a single-select field type for the EvergreenReq custom field is available automatically without further configuration for clients using Evergreen Req.

### Workbench Self-Service Certified Users

Enabling the feature automatically creates a new custom req field, **EvergreenReq**. The field can be added to all req forms from which evergreen reqs can be created, and used to indicate whether a specific req is to be treated as an evergreen req. If present, the field is set as always required for all languages.

You can edit or view the field’s attributes in **Tools > Forms > Req > Req Forms > Define Custom Req Fields**

Defaults are:

- Placement
- Database field name = [EvergreenReq]. This field can NOT be modified
- Field name = [Evergreen Requisition]
- Field type = Single Select. This field can NOT be modified.
- Custom report field = “No”
- Posting interface mapping = “None”. This field can be NOT modified.
- Instruction type = “None”
- Font size = “Medium”
- Encrypted = “No”
- HR status restrictions = “No”
- Field length = 255
- Searchable = “No”
- Outputable = “No”
- Options Source
  - Set to “Maintain Custom List”. This field can NOT be modified
  - Custom list has “Yes” and “No” options (No is the default)
  - The options list can not be deleted or inactivated, these icons will not be displayed. The options can be edited to modify label and can be translated. No new options can be added, the Add link will not be displayed.
- Field associations will not be configured by default but can be enabled.

# Data Insight Tool – Job-Specific Response Forms

Talent Gateway form responses and Job-Specific responses by candidates are now available in Data Insight Reports.

<b>Product</b>	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Data Insight Tool
<b>LDP 168 Release 13.3</b>	<input checked="" type="checkbox"/> Talent Gateways	
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document sent for each release build.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic – see details below.	

## Feature Description

Previously Data Insight users had no practical way to report on a Job Response “form” created once a candidate answers a req’s job-specific questions on the Talent Gateway form (which is a multiple-per-candidate form). The Data Insight Tool treated this simply as a candidate form and did not associate it with the requisition. Users had to run the report showing “all” responses, then match responses to requisitions by looking at the candidate’s Talent Record. There 2xB displays the original Talent Gateway form, as well as the Job Response “form” created with the candidate’s responses, as two forms. The Job Response form has default questions as well as job- specific questions, and is associated to a req.

This feature addresses this issue, providing the ability to report on req-specific response forms. Changes have been made to the report output, and a new field is available for the Security and Filter worksheets: **TG / Job Response Form**.

## Output

There are no changes in the output field tree for the Output worksheet, only in the output report. The original “Talent Gateway” form and a “Job Response” form with responses for a candidate for a particular req are shown in two separate rows.

- Current functionality remains the same when a TG form is selected with any instance: Data Insight displays the responses for all TG forms associated with a candidate. If a req is not selected, Data Insight shows the data for jobless submissions.
- Users selecting questions (under form fields) that are associated to a req for a candidate will see the responses displayed in separate rows for the candidate’s different reqs.
- The Job Response Form displays only if the Talent Gateway form was posted out to a Gateway.
- The questions will be available for the Output worksheet. Users can filter on the field values, and the drop down list continues to have the same options: Most Recent (the default), First Instance, and All.
- User must select Req ID as an output field in order to display Job Response form responses in the report output; otherwise, the candidate responses can’t be tied to the response form data.
- When users select “Form name” and “Talent-Gateway” form in output fields, the “Form name” column in the output report is displayed as follows:

For Talent Gateway (if no req selected): [Form Title]

For Talent Gateway (if req selected): [Form Title]-[AutoReq/OptionalReq]:[JobTitle]

For Job Response: Job Response-[GroupsSiteName/SiteName]/[AutoReq/OptionalReq]

## Sample Reports

**Example 1:** User selects Form name, First name and Last name (of candidate), and Talent Gateway questions, and candidate John Smith is associated to three reqs (but Req is *not* selected in output fields):

- Previously, output report displayed the responses for all Talent Gateway forms associated to John Smith, repeating the responses for all three reqs three times in the report.

Form name	First name	Last name	Ques 1	Ques 2	Ques 3	Ques 4	Ques 5	Ques 6
Talent-Gatew ay	John	Smith			Yes	50-75	No	
Talent-Gatew ay	John	Smith	Yes		No	0-25	No	
Talent-Gatew ay	John	Smith	Yes	No	Yes	25-50	No	4 Weeks Plus
Talent-Gatew ay	John	Smith			Yes	50-75	No	
Talent-Gatew ay	John	Smith	Yes		No	0-25	No	
Talent-Gatew ay	John	Smith	Yes	No	Yes	25-50	No	4 Weeks Plus
Talent-Gatew ay	John	Smith			Yes	50-75	No	
Talent-Gatew ay	John	Smith	Yes		No	0-25	No	
Talent-Gatew ay	John	Smith	Yes	No	Yes	25-50	No	4 Weeks Plus

- New output report displays the responses for all Talent Gateway forms associated to John Smith for the three reqs in one row for each req.

Form name	First name	Last name	Ques 1	Ques 2	Ques 3	Ques 4	Ques 5	Ques 6
Talent-Gatew ay	John	Smith			Yes	50-75	No	
Talent-Gatew ay	John	Smith	Yes		No	0-25	No	
Talent-Gatew ay	John	Smith	Yes	No	Yes	25-50	No	4 Weeks Plus

**Example 2:** User selects Form name, AutoReqID, First name and Last name (of candidate), and Talent Gateway questions, and candidate John Smith has req-specific responses associated to three reqs (and Req is selected in output fields):

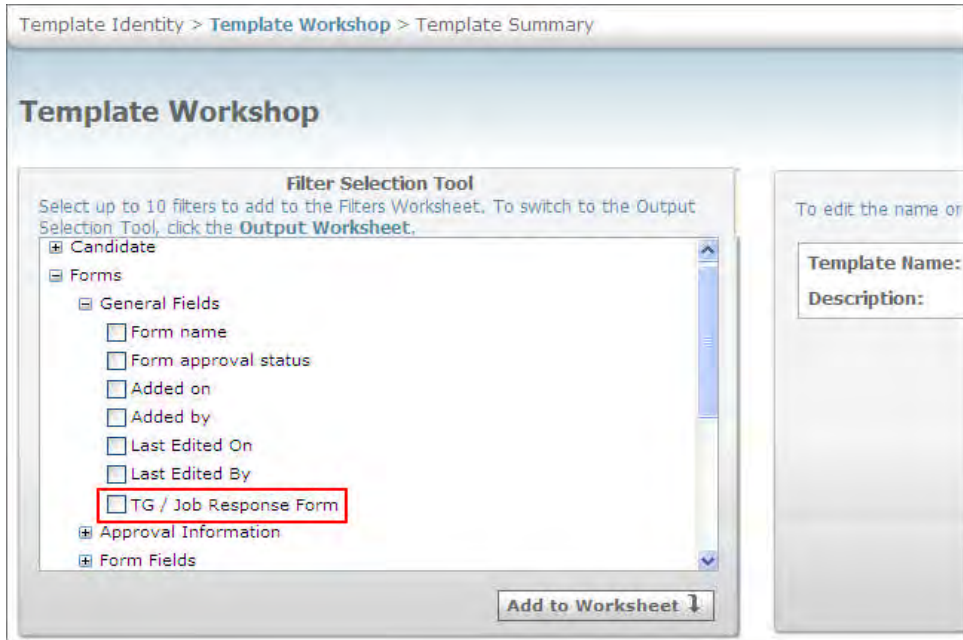
- New output report displays the responses of Talent Gateway forms for each of Jon Smith's reqs, with responses for the three Job Response forms in a separate row for the three reqs with which they are associated.

Form name	AutoReqID	First name	Last name	Ques 1	Ques 2	Ques 3	Ques 4	Ques 5	Ques 6
Talent-Gatew ay	123BR	John	Smith	No	Yes	Yes		No	
Talent-Gatew ay	456BR	John	Smith	Yes	No	No	0-25	No	4 Weeks Plus
Job-Response	456BR	John	Smith	Yes	No		0-25		
Talent-Gatew ay	789BR	John	Smith			No	50-75	Yes	2 Weeks Plus
Job-Response	789BR	John	Smith			No	50-75	Yes	2 Weeks Plus
Talent-Gatew ay	109BR	John	Smith	Yes	No	Yes		No	3 Weeks Plus
Talent-Gatew ay	267BR	John	Smith	No	Yes		25-50	Yes	
Job-Response	267BR	John	Smith		Yes		25-50	Yes	

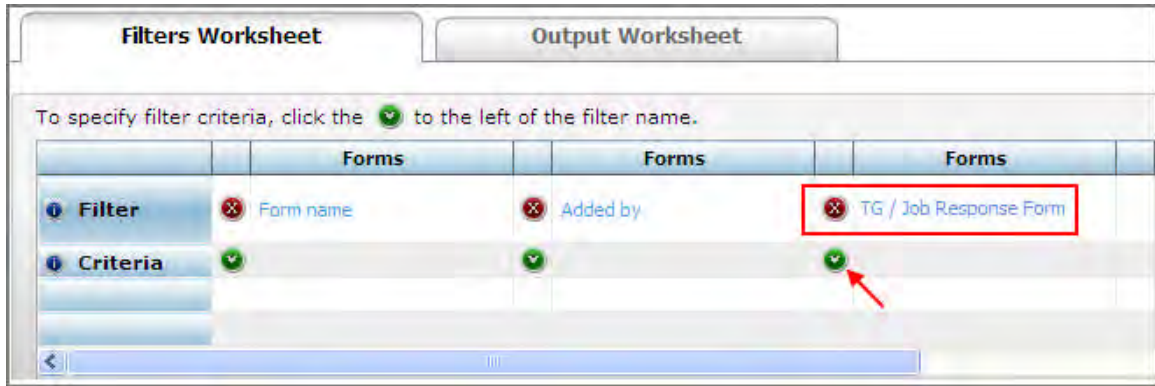
## Security and Filter

For the Security and Filter worksheets (**Data Insight tool > Manage Users and Roles > User Role Library** or **Data insight tool > Manage templates > Create New Template OR Edit Template > Filter Worksheet**), a new field is available in the **Forms > General Fields** category:

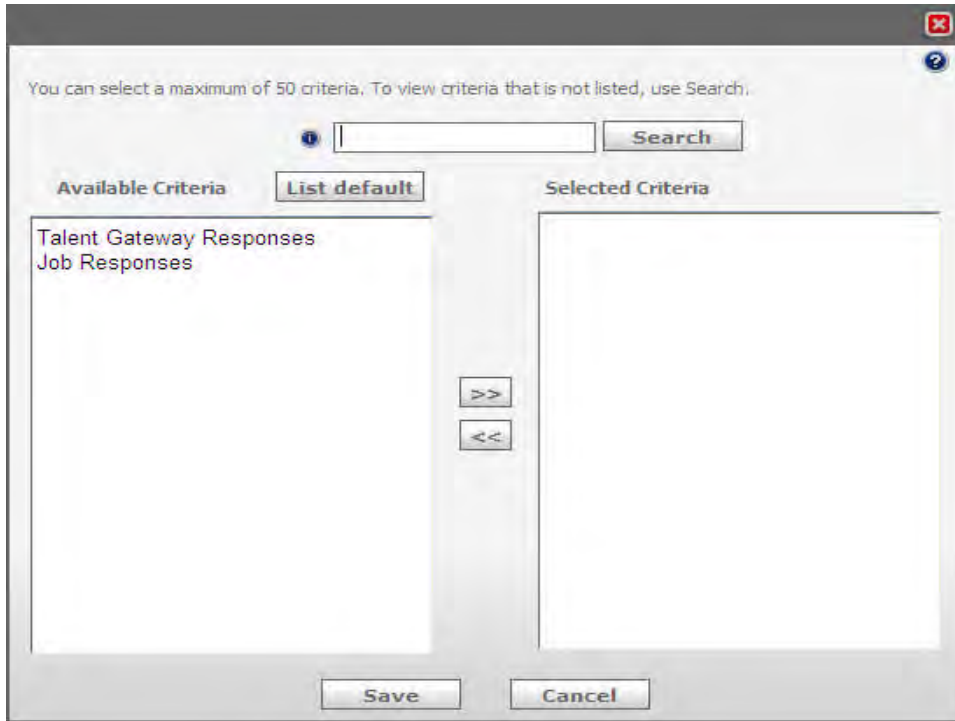
### TG / Job Response Form



To filter output by form type responses, users can select TG / Job Response Form in the Filter worksheet (no need to select TG / Job Response Form if you want to view both types of response data).



After selecting and adding “TG / Job Response Form” to the worksheet, click the inverted triangle in the criteria selection box to open a new window displaying the options in the available criteria list.



Options are “Talent Gateway Responses” form and “Job Responses.” Add either (or both), as desired, to view the TG form data or/and Job response data for a candidate.

### Limitations and Known Issues

- Jobless Submission: When AutoReqID or req-related data is selected as an output field, jobless TG form data is not displayed; only TG forms associated to a req are displayed in the report. In order to see the jobless TG Form data in the report, do not select AutoReqID or req-related data.
- When GQ is associated to a TG/Req: An issue as yet unresolved concerns candidate submissions to a TG/Req that has a GQ when the candidate has also submitted for other reqs. Currently the GQ TG form is displayed multiple times (once per a requisition).

### How Do Clients Get this Feature?

This feature is available automatically without configuration.

# Data Insight Tool – View Report Templates Tab

This feature provides Data Insight admin users with information on all the templates that are scheduled and are being run across their organization.

<b>Product</b> RDP 729 Release 13.3	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Data Insight Tool
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document sent for each release build.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic – see details below.	

## Feature Description

A new **View Report Templates** tab is added in the Data Insight Tool. The tab, available only to the Data Insight Tool Admin user type, displays information about the reports that are currently running, queued, failed or completed within the last 24 hours across the user’s organization

**2xB Path:** Reports > Data insight tool > Manage templates > View Report Templates

Template Name	Run Mode	Status	GMT Timestamp	Created by	Scheduled by	Run Date
Candex req and candidate report 21 GMT	Scheduled	Completed. FTP Delivery Success.	21:00 GMT	Ramuk, Antar (j)	Ramuk, Antar (j)	24-Jun-2013 3:04 AM [IST]
Candex req status report 21 GMT	Scheduled	Completed. FTP Delivery Success.	21:00 GMT	Ramuk, Antar (j)	Ramuk, Antar (j)	24-Jun-2013 3:03 AM [IST]
Candex req and candidate report 13 GMT	Scheduled	Completed. FTP Delivery Success.	13:00 GMT	Ramuk, Antar (j)	Ramuk, Antar (j)	23-Jun-2013 6:59 PM [IST]
Candex req status report 13 GMT	Scheduled	Completed. FTP Delivery Success.	13:00 GMT	Ramuk, Antar (j)	Ramuk, Antar (j)	23-Jun-2013 6:57 PM [IST]
TPX Req and Candidate Status Report	Scheduled	Completed	05:00 GMT	Ramuk, Antar (j)	Ramuk, Antar (j)	24-Jun-2013 11:06 AM [IST]
TPX Overall Req Candidate Report	Scheduled	Completed	05:00 GMT	Ramuk, Antar (j)	Ramuk, Antar (j)	24-Jun-2013 11:06 AM [IST]
TPX Overall Candidate Report	Scheduled	Completed	05:00 GMT	Ramuk, Antar (j)	Ramuk, Antar (j)	24-Jun-2013 11:02 AM [IST]
Candex Overall Candidate Report	Scheduled	Completed. FTP Delivery Success.	05:00 GMT	Ramuk, Antar (j)	Ramuk, Antar (j)	24-Jun-2013 11:01 AM [IST]
TPX Req Status Report	Scheduled	Completed	05:00 GMT	Ramuk, Antar (j)	Ramuk, Antar (j)	24-Jun-2013 11:05 AM [IST]

The View Report Templates grid has the following columns:

**Template Name:** Displays the name of the report template.

**Run Mode:** Displays the job type in which the report template is run, whether Ad Hoc or Scheduled

**Status:** Displays the status of the report, whether completed, queued, failed etc. This column also provides the error message if the report failed to run.

**GMT Timestamp:** Displays the GMT Time stamp

**Created by:** Displays the name of the user who created the report template

**Scheduled by:** Displays the name of the user who scheduled the report template

**Run Date:** Displays the date and time at which the report is scheduled to run along with the time zone of the user.

All the columns in this grid are sortable. Users can sort the grid by clicking the header of any column. By default, the grid is sorted based on the GMT Timestamp column.





**Note:** The maximum number of reports that can be displayed in this grid is 25. Pagination is available to browse through all the reports that are listed.

The columns **Created by** and **Scheduled by** provide the names of the user that created and scheduled the report templates, respectively. The names are displayed as hyperlinks; clicking the hyperlink displays a pop up box that contains the name of the user, user's email address and telephone number.



## How Do Clients Get this Feature?

This feature is available automatically without configuration. However, only users that have Data Insight Tool admin user type access can view this tab.

# Employee Referral Gateways – Honoring JSQ Scores

Employee Referral Gateway data privacy submission has been changed so that the referred candidate must have a qualifying score on job-specific questions in order to be placed in the “passing” HR status (status for candidates who have achieved minimum required scores on the JSQs).

<b>Product</b> RDP 723 Release 13.3	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Talent Gateways – ERG
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document sent for each release build.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic – see details below.	

## Feature Description

A problem previously existed for the Employee Referral Gateway (ERG) workflow when requiring acceptance of a Data Privacy policy. The referred candidate was automatically placed into a “favorable” HR status, regardless of the presence of job-specific questions where the candidate had not achieved a minimum score on the JSQ.

This has now been corrected. The pass/fail HR status based on any JSQ-scored questions is now applied to the referred candidate.

## How Do Clients Get this Feature?

This feature, which affects clients requiring acceptance of a data privacy policy on their Employee Referral Gateways, is available automatically without additional configuration (for both WCAG and non-WCAG gateways).

### Workbench Self-Service Certified Users

This feature corrects the ERG workflow behavior for clients with the following Talent Gateway attributes set in **Tools > Talent Gateways > Edit** [selected gateway]:

**Referral submission = Data privacy**

**Referral privacy policy placement: = Referred candidate eLink data privacy required | with question**

Talent Gateway details

Referred candidate eLink designated Talent Gateway: Ravi\_testing for SM login (English - United States)

Referred candidate eLink forms attached: TPX Agent Contact Information, Background Check Results (Standard), CFA\_Calc, Interview Builder Results, KAS Assessment

Referred candidate eLink start page: Questions/Forms

Referral submission: Data privacy

Referral privacy policy placement:  Referred candidate eLink data privacy required,  Referred candidate eLink data privacy with question

Referring employee questions for non-GQ flow: Selected (1) List>

Apply URL (If not feeding directly into 2xB):

Go directly to login page from external URLs

# Event Manager - Enhancements

Several new features were added to Event Manager (EM) for Release 13.3. These features are also included in the Event Manager guides, *Event Manager Administrator's Guide* and *Event Manager User's Guide*, posted on the User Resource Center (URC).

<b>Product</b> <b>Release 13.3</b> <b>LDP 132, 186, 053</b> <b>RDP 884, 679, 992</b>	<input checked="" type="checkbox"/> 2x BrassRing <input checked="" type="checkbox"/> Workbench Self-Service	<input checked="" type="checkbox"/> Event Manager
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – some new changes are documented in the <i>Visible Changes</i> document sent for each release build.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.	

## Feature Description

This release of Event Manager incorporates a variety of new features to support a more integrated 2xB/Event Manager workflow. In Event Manager, you can now:

- Configure customized language-specific candidate registration pages
- Use automation features for manually scheduled candidates including the sending of confirmation, and reminder message (includes automatic update of Candidate HR statuses based on Event Manager outcomes)
- Use req field merge tokens in candidate and event team messages
- Access new email message tokens that represent candidates and their time slot event commitments
- Click a People button on the Assessor's My Schedule Page to access the View Candidate page

## Feature List

The following is an introduction to Event Manager features released in 13.3. Following each item in the list is a brief feature description including abbreviated configuration instructions.

For in depth information regarding these features refers to *Event Manager Administrator's Guide* and the *Event Manager User's Guide*.

Please contact your Kenexa Support Team for more information about enabling these features.

- [Enhanced Multilanguage Candidate Communications](#) (679)
- [Automation of Manually Scheduled Candidates](#) (132)
- [Req Field Merge Tokens](#) (186)
- [New Email Message Tokens](#) (884)
- [Assessor's My Schedule Page – Viewing Candidate Pages](#) (053)
- [System Scheduling Settings and Label Changes](#) (992)
- [New Candidate Invitation Restriction Option](#) (992)
- [New Time Slot Enhancement](#) (CCR)
- [Candidate Search Field Enhancement](#) (CCR)

## Enhanced Multilanguage Candidate Communications

Clients, who purchase multiple languages for 2xB and enable Multilanguage Candidate Communications (MLC), can now configure customized language-specific candidate registration pages. In addition, these language-specific candidate registration pages now support the translation of hard-coded fields such as Action button labels. MLC is an existing EM feature that allows clients purchasing more than one language to customize event attributes (fields) during event configuration.

Previously when clients purchased languages and configured event registration pages, the default registration page was translated. Candidates received the default registration page translated into their own language

With this feature enabled, EM Administrators can now create language-customized registration pages for each purchased language. Hard-coded items (buttons and field text) within those language-customized registrations pages are also translated for each respective language.

When this new feature is enabled, candidates now view client-created language-customized registration pages AND translated hard-coded items within those communication messages.

## Event Manager Supported Languages

The following languages are supported in Event Manager:

- English US
- English International
- French Canadian
- French
- German
- Italian
- Dutch
- Simplified Chinese

## Event Manager 2XB/Recruiter and Candidate Experience

When this feature is configured and different customized registration pages are assigned to an event based on a candidate language, the candidate views the registration page assigned for his/her language.

For example, Rosa is an event administrator and recruits French and Dutch candidates. Rosa has created two sets of registration pages in Event Manager; one set customized with text (strings) in French, and one set customized with text (strings) in Dutch.

When Rosa creates her event template, she assigns her French registration page to her purchased French language and her Dutch registration page to her purchased Dutch language. When candidates access the event registration pages, French candidates see the customized text, *and* all hard-coded fields and action button labels in French, and the Dutch candidates see the customized text, *and* all hard-coded fields and action buttons in Dutch.

Events: Edit Event

Event from Series: 1000 event series\_test 08/20/2013

Event Template: Prad Event Template

Event name: 1000 event series\_test

Status: Please Select

Event date: 08/20/2013 (MM/DD/YYYY)

Start time: 09 : 00 AM

End time: 01 : 00 PM

Slots remaining: 0 (total from time slots)

Alert the event team when less than 10 available slots are remaining across this event series

Lock Registration: 0 days prior to the event date

Branding image: [Confirm and upload image](#)

Candidate Registration Page: System Default

- [Dutch] Dutch Registration Page
- [French] French Registration Page
- [German] System Default



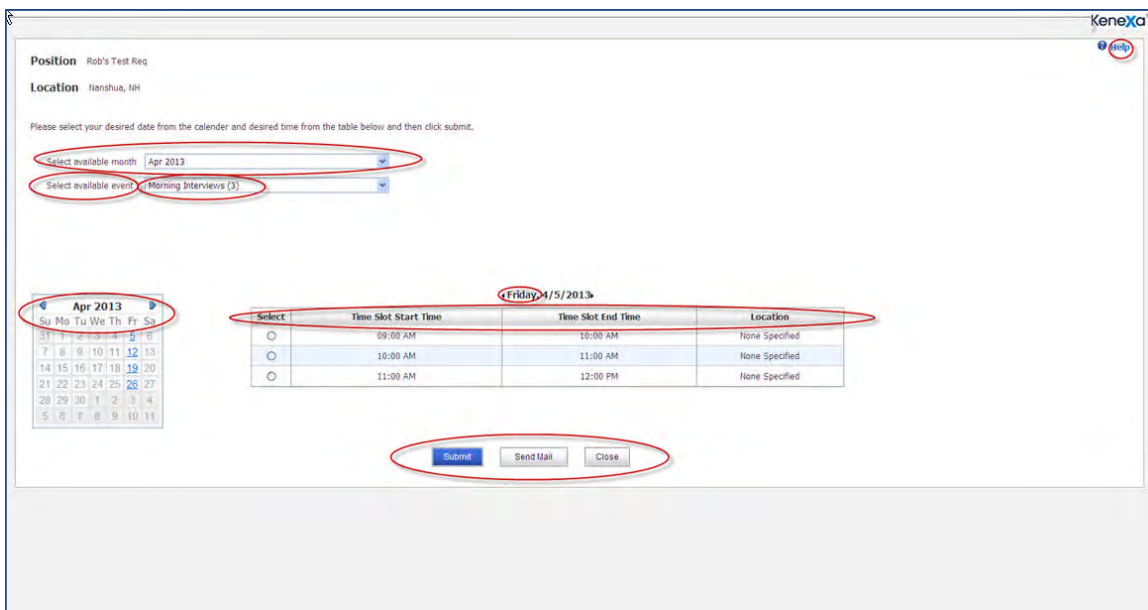
Event Administrators are responsible for creating customized language-specific text for registration pages written in the expected language of the candidate accessing that registration page. Administrators then assign the appropriate registration page for each language when creating events and event templates. The System now translates the hard-coded fields and action button labels.

If a client has purchased multiple languages and enabled MLC, all of the hard coded fields and button labels (outlined in red) in the following screen shots are translated into a candidate's language within the registration, confirmation, and reminder messages.

### Pre-Registration Page

The following hard-code fields and button labels on the pre-registration page are translated for purchased languages.

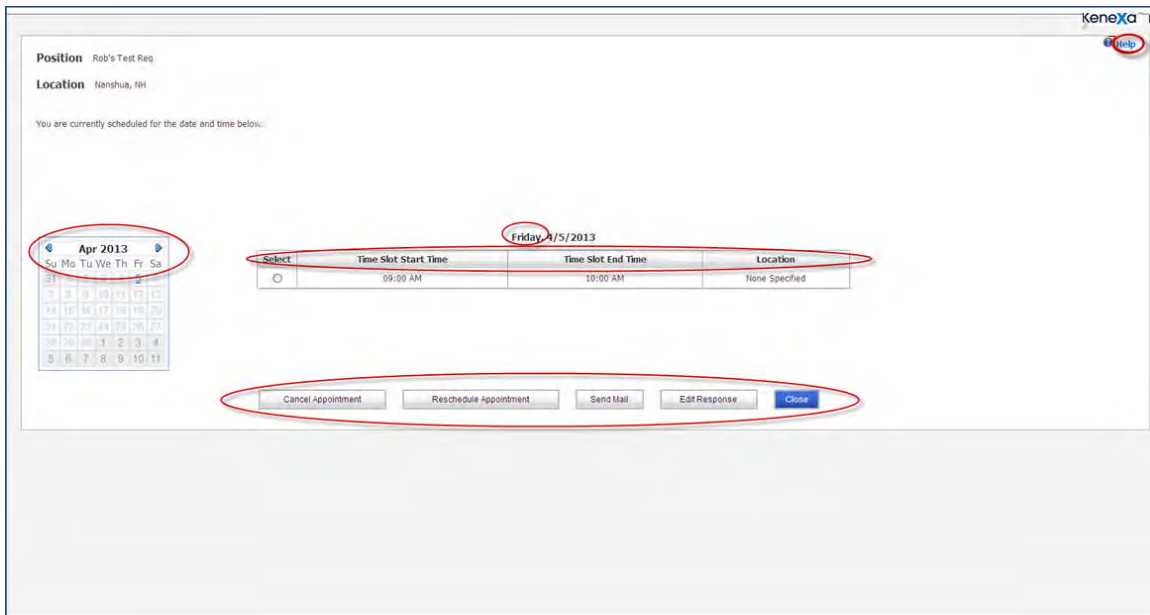
- Select available month
- Select available event
- View of calendar
- Day of week/Date
- Select:
  - Time Slot Start
  - Time Slot End
  - Location
- Submit
- Send Mail
- Close



### Post Registration Page

- The following hard-code fields and button labels on the post-registration page are translated for purchased languages.
- View of calendar
- Day of week/Date
- Select:

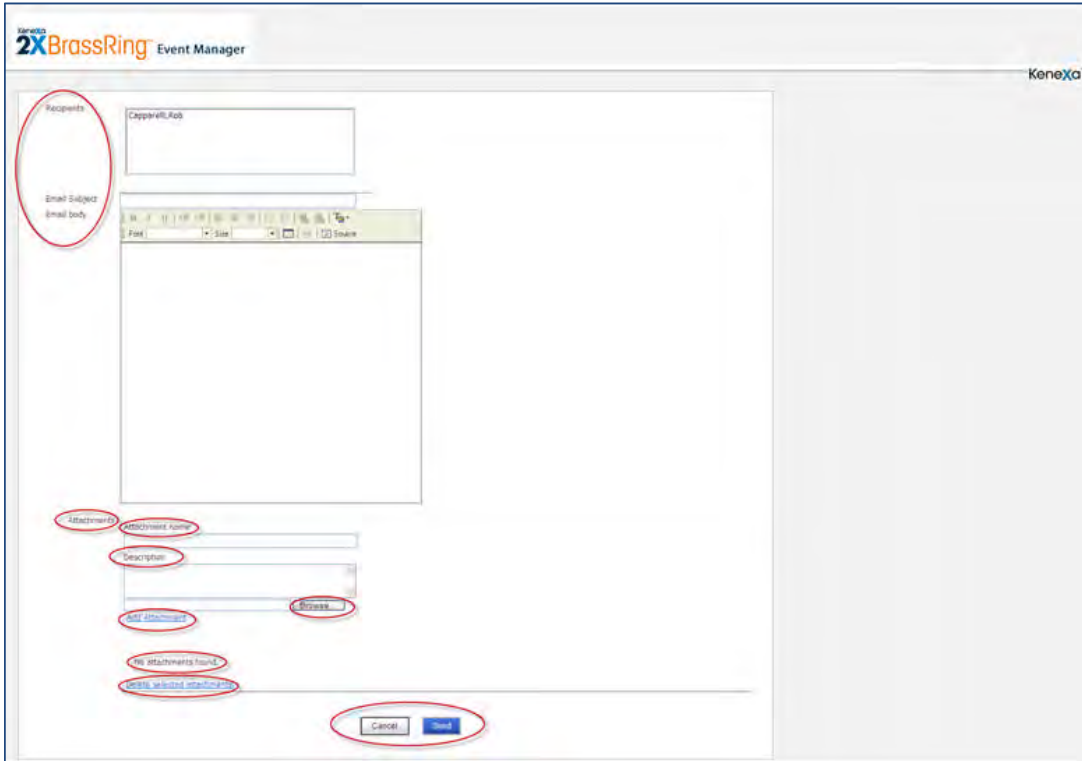
- Time Slot Start
- Time Slot End
- Location
- Cancel Appointment
- Reschedule Appointment
- Send Mail
- Edit Response
- Close
- Submit
- Send Mail
- Close



### Send Email Dialog Box

The following hard-code fields and button labels on the Send Email page are translated for purchased languages.

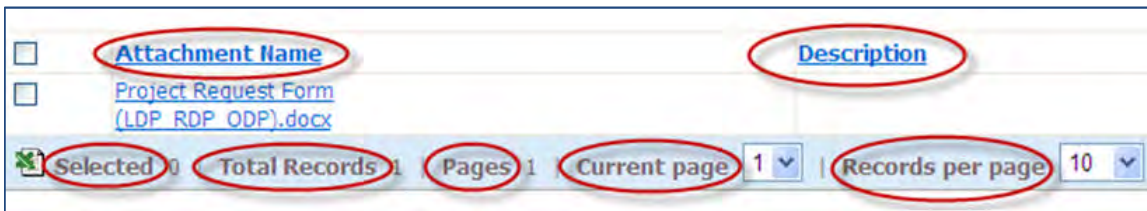
- Email subject
- Email body
- Attachments
  - Attachments Name
  - Description
  - Add Attachment
  - Browse
  - No Attachments found
  - Delete Selected Attachment
- Cancel
- Send



### Attachment Widget (Associated with Send Email)

The following hard-code fields and button labels on the Attachment Widget section within the Send email page, now displays translated for purchased languages.

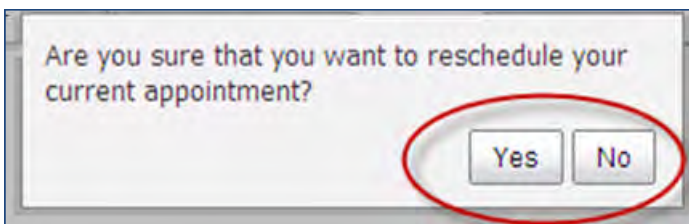
- Attachment Name/Description
- Project Request Name
- Selected/Total Records/Pages/Current page/Records per



### Pop-up Error/Warning Dialog Boxes

The Reschedule dialog box dialog box is representative example of a pop-up error/warning message containing customizable text (client needs to translate) and hard-coded text (button labels) the system translates.

- Yes/No



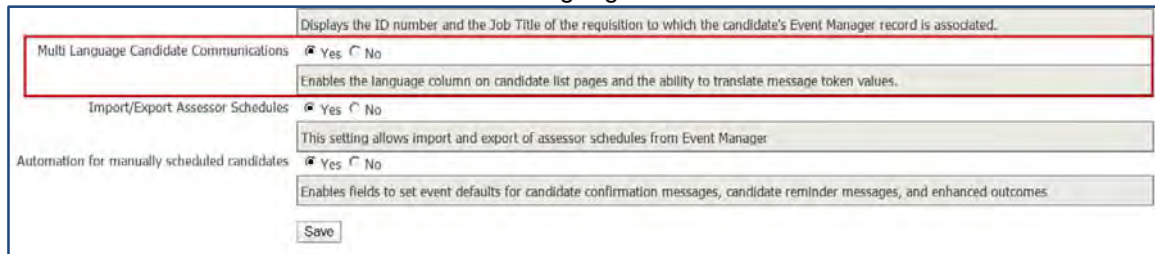
## How Do Clients Get This Feature?

Clients must have purchased languages for translations before Event Administrators enable the MultiLanguage Communication feature. Clients are responsible for creating customized language-specific text strings for candidate registration pages in the expected language of the candidate.

### In Event Manager - System Settings (Administrator)

To enable MLC:

1. **Admin > Systems > General.**
2. Select the **Yes** radio button to enable Multi Language Communication.



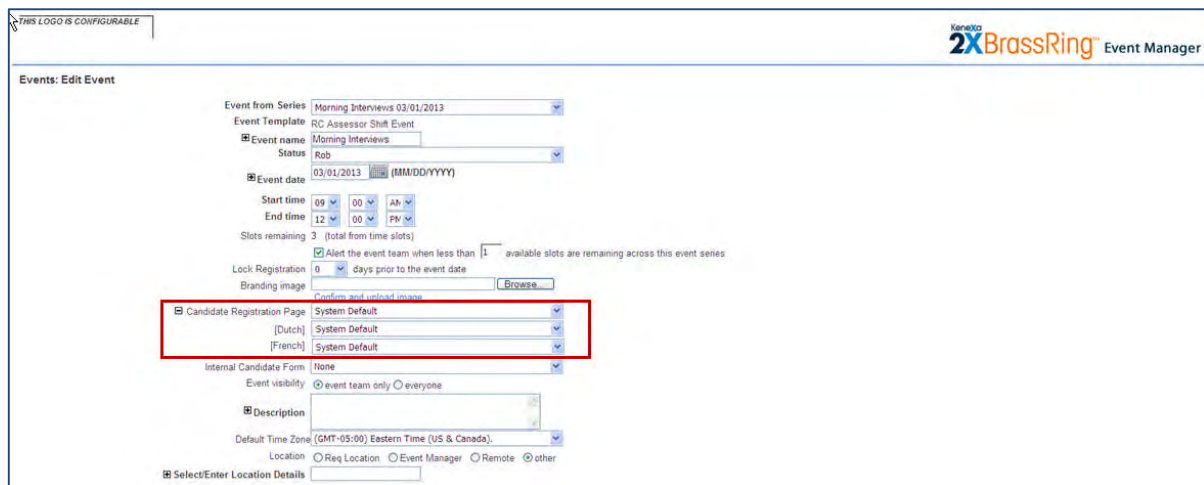
3. Click **Save**.

When MLC is enabled and clients have purchased languages, Administrators must then create language-specific candidate registration pages for each of their purchased languages.

Administrators can then assign each language-customized registration page when configuring event templates.

### In Event Manager Template Configuration (Administrator):

1. **Admin > Templates > Event Template.**  
The edit event template displays.
2. Click the **Expand icon [+]** to the left of the Candidate Registration page section to display the client's purchased language selections.
3. Select a pre-configured language-specific Registration Page for each purchased language.



4. Complete all fields required for the event.
5. Click **Save**.



## Automation of Manually Scheduled Candidates (132)

This new EM feature introduces two new functionalities. The primary functionality is designed to support automation features for [manually scheduled candidates](#) previously only available to self-scheduled candidates. The second functionality supports new configurations to [streamline the event invitation workflow](#).

### Manually Scheduled Candidates

Manually scheduled candidates include candidates sent to a specific event instance in Event Manager via the Send to Event Manager, Moved to Event, or Copied (Copy) to Event, and Reschedule (from EM Event Roster) actions. When this feature is enabled and fully configured, the following automated processes now occur for manually scheduled candidates:

- Registered candidates are sent event confirmations
- Registered candidates are sent reminder messages as event dates approach
- An eLink is added to the candidate's EM TG page allowing the candidate to view their registration and to reschedule or cancel themselves out of the event later
- HR statuses for manually scheduled candidates update throughout Event Manager and 2xB
- EM Users can enforce invitation rules based on new system settings
  - See [System Scheduling](#) settings
  - New [Candidate Invitation Restriction Option](#)

Previously, EM Users had to manually send event confirmation and reminder messages and update HR statuses for manually scheduled candidates. These enhanced features were only available to candidates who self-registered for events.

### Overview - Example Scenario (Manually Scheduled Candidates)

This example is given to demonstrate how this feature might work when fully configured.

1. Candidate is scheduled to the Interview Event on August 12 and is moved to the Interview Event on August 19
2. Cancelled Outcome for Aug 12 event assigned to candidate
3. HR Status assigned to Cancelled Outcome for Aug 12 event is assigned to candidate in 2xB
4. Registered Outcome for Aug 19 event assigned to candidate
5. HR Status assigned to Registered Outcome for Aug 19 event is assigned to candidate in 2xB
6. Confirmation Message for Aug 19 event sent to candidate
7. Registration link on EM Talent Gateway page is updated for August 19 event
8. Reminder Message for Aug 19 event is sent to the candidate X days before August 19

### Event Manager 2xB User/Recruiter Experience(Manually Scheduled Candidates)

In the following example, the Event Administrator has:


- enabled the Systems > General settings
- configured and assigned Valid Outcomes for Registered, Rescheduled, and Cancelled
- created and selected message templates for event confirmation and reminder messages

The following example might be a typical scenario for a manually scheduled candidate.

1. Event Recruiter contacts candidates outside of Event Manager.
2. Candidate indicates he/she would like to attend an upcoming event at a specific time.
3. Event Recruiter navigates to the Candidate's record in 2xB.
4. Event Recruiter clicks **Action > Send to Event Manager**.  
The Send to Event Manager screen displays:

- Event Recruiter selects an **Event Instance**, a **time slot**, and clicks **Send**.

- Candidate is automatically registered for the event, sent an event confirmation message, and the candidate's HR status is updated with the HR status associated with the 'Registered' outcome for the event.

 Confirmation message, reminder messages, and HR statuses are based on the event's configuration. messages assigned to the event.

- Five days before the event the Candidate receives an automatically generated Reminder message.
- Candidate navigates to their EM Talent Gateway page and cancels out of the event.

The Candidate is removed from the event and assigned the Cancelled Outcome and the outcome's associated HR status.

## Streamlining of Event Invitations

Event Manager now offers some configuration options to support both Automation of Manually Scheduled Candidates noted previously AND a streamlined event invitation process. You can configure a streamlined event invitation process in conjunction with the automation of manually scheduled candidates OR you can configure it independently.

If you configure a streamlined event invitation workflow WITH automation of manually scheduled candidates enabled, event templates then created inherit event defaults for candidate confirmation and candidate reminder messages, and enhanced outcomes.

You can configure some additional system settings and use the same configuration for automating manually scheduled candidates to streamline your event invitation process.

### Overview - Example Scenario (Streamlined Event Invitation Workflow)

This example is given to demonstrate the streamlining of the event invitation workflow. Recruiter wants to send event invitations to a group of candidates for an event series and wants to make sure these candidates receive the same communications and HR status changes as manually candidates.

#### In Event Manager:

- Event Recruiter selects the appropriate candidates and selects the Send Invitation action. The Send Message page launches, and the Event Recruiter:
  - Accepts the default invitation message template
  - Selects the event series in the Invite to field

- Accepts default invitation rules (See [Default Invitation](#) settings)
- Accepts default values for the remaining values of Outcomes Status (Registered, Cancelled, Reschedule), message templates (Reminder and Reschedule), and Send Before Days
- Selecting these defaults ensures these candidates will received the same messaging and outcomes as other candidates in this event.

2. Recruiter clicks **Send**.

### Event Manager 2xB User/Recruiter Experience (Streamlined Event Invitation Workflow)

In the following example, the Event Administrator has:

- Configured the Systems > General enhanced outcomes setting to Yes
- Configured the Systems > General Automation of manually scheduled candidates
- Configured and assigned Valid Outcomes for Registered, Rescheduled, and Cancelled to the event
- Created and selected default message templates for event confirmation and reminder messages and assigned them to the event
- Enabled the Systems > General settings for Default Invited Outcomes



When 2xB users send candidates email event invitations and select Event Default options for both message and outcomes, manually scheduled and self-scheduled candidates receive the same event messages and outcome assignments.

In Event Manager:

1. **Candidates > Unscheduled Candidates.**
2. Event Recruiter selects the appropriate candidates and clicks **Send Invitation**. The Send Message page launches.
3. Event Recruiter selects the event series in the **Invite to** field, accepts all Event Defaults, and click **Send**.

**Send Message**

Select message template for invitation: 1 Candidate Invitation Category selected template [Edit Message](#)

Invite to:

- Any scheduled event
- An event type: 00\_save as temp today
- An event series
- An event instance: BB Test Event\_00;10/04/2013; (2)

**Default Invitation rules** (indicated by a red arrow)

Restrict the number of events visible to the candidate by:

- Do not restrict
- Number of event occurrences
  - Total number to display to candidate:
- Time frame
  - Display all events of the type selected that fall within the next:
    - day(s)
    - week(s)
    - month(s)
  - Minimum number of events occurrences to display (can display events beyond time frame):

Maximum online reschedules: N/A

Select Outcome for Invited Status: Event Default

Select Outcome for Registered Status: Event Default

Select Outcome for Cancelled Status: Event Default

Select Outcome for Reschedule Status: Event Default

Upon registration:  Copy candidate to event  Move candidate to event

Select message template for confirmation: Event Default

Select message template for reminder: Event Default

Send before Event: Event Default

## How Do Clients Get This Feature?

### Automation for Manually Scheduled Candidates

In support of the primary feature functionality use this setting, The System > General setting > Automation for manually scheduled candidates. This setting:

- Controls the ability to send automated messages typically sent to self-scheduled candidates (confirmation and reminder messages) to manually scheduled candidates.
- Allows the setting of defaults for candidate confirmation and reminder messages, and enhanced outcomes.
- Automatically changes the candidates' Event Manager Outcomes and their associated 2xB HR statuses.

#### In Event Manager –System Settings (Administrator)

To configure the Automation for manually scheduled candidates setting:

1. Navigate to **Admin > Systems > General**.
2. Select the **Yes** radio button for:
  - **Enable enhanced outcomes** (Optional)
  - **Automation for manually scheduled candidates**.

Enabling enhanced outcomes adds the new Registered, Cancelled, and Reschedule status fields to the Valid Outcomes tab on the Event Template and Event configuration pages:

3. Click **Save**.

**Optional Settings**

In Event Manager –Template Configuration (Administrator)

Administrators should now chose Valid Outcomes (registered/cancelled/reschedule) and message templates (confirmation and reminder) for event templates, so that when events are created from these templates, these values are already assigned to the event.



If enhanced Outcomes were not previously enabled, Event Administrators should define the Outcomes for each Candidate HR status via the List Maintenance > Outcomes if EM Users expect HR status updates. Event Administrators are also responsible for creating Message Templates for confirmation and reminder messages. Once outcomes and message templates are configured

1. **Admin > Templates > Event Templates.**
2. Click **New** to create a new template or **Edit** to edit an existing template. The Event Template launches.
3. Click the Expand Icon on the Valid Outcome tab and associate an Event Manager Outcome for the Registered, Cancelled, and Rescheduled outcomes.
4. Click the Expand Icon on the Messages tab and select a message template for the confirmation and reminder messages.
5. Select an option in the **Send Before Event** field to select the number of days before an event you want the reminder message to be sent.

**Valid Outcomes**

Available Outcomes

Selected Outcomes

- Phone Screen - ENG
- Intermediate stage
- Outcome name = No Default
- Outcome name = Yes
- SR-OFFER ROLLED
- 3 Cancelled
- 2 Rescheduled

Select Outcome for Registered Status: 1 Phone Screen Registered

Select Outcome for Cancelled Status: 3 Cancelled

Select Outcome for Reschedule Status: 2 Reschedule

**Messages**

Select message template for confirmation: 2 Confirmation Message Template [Edit Message](#)

Select message template for reminder: 3 Reminder Message Template [Edit Message](#)

Send before Event: 3days

Close View Single Event Save to Single Event

6. Click **Save to Single Event**.

## Streamlining of the Event Invitations Workflow

You can configure a streamlined event invitation process in conjunction with the automation of manually scheduled candidates or you can configure it independently.

When this feature is fully configured an Event Recruiter can select candidates and with just a few clicks, send an event invitation to multiple candidates.

To configure a streamlined invitation process:

- Configure the Candidate Invitation Message Template
- Configure the Default Invited Outcome
- Configure the Enable Restrictions for Event Invitations

### In Event Manager –System Settings (Administrator)

1. Navigate to **Admin > Systems > Notifications**.
2. Use the drop-down menu to select a default message template in the Candidate Invitation Message section.

This default message template is used for the Send Invitation and the New Event Sequence pages.

3. Click **Save**.
2. Navigate to **Admin > System > General > Default Invited Outcome**.



This new setting is only available if the System > General setting Enable Enhanced Outcomes is set to **Yes**.

Selecting a default Invited Outcome here for all of the other invitation attributes such as confirmation message, reminder message, registration outcome, cancellation outcome, and reschedule outcome ensures that manually scheduled candidates and self-scheduled candidates receive the same outcomes and messages.

- This setting also sets a default value in the Invited Outcome field on the Send Invitation and the New Event Sequence pages. A new value 'Event Default' will be added to the following fields on the Send Invitation and New Event Sequence pages:
  - Select Outcome for Registered Status
  - Select Outcome for Cancelled Status
  - Select Outcome for Reschedule Status
  - Select message template for confirmation
  - Select message template for reminder
  - Send Before Event

3. Click **Save**.
4. Navigate to **Admin > System > Scheduling > Enable Restrictions for Event Invitations**, and click **Set Default** to configure the Set Default options. For more information on this feature see [Enable Restrictions Setting](#).
5. Click **Save**.

#### In Event Manager –Template Configuration (Administrator)

As noted in the above configuration for automation for manually scheduled candidates, Administrators should now choose Valid Outcomes (registered/cancelled/reschedule) and message templates (confirmation and reminder) for event templates, so that when events are created these values are already assigned to the event.

## Req Field Merge Tokens in Event Manager (186)

Req field merge tokens representing standard and custom requisition fields used in 2xB requisitions are now available for use in Event Manager message templates. When a 2xB candidate is sent to Event Manager from a requisition folder, the requisition remains associated with the candidate. The req field merge tokens associated with that requisition remain associated with that candidate and are available for use when sending that candidate Event Manager messages (invitation, confirmation, and reminder).

For example, a candidate is sent to Event Manager from a 2xB requisition folder and the req contains 20 standard req fields and 4 custom req fields. When an EM Administrator or EM User composes a message to that candidate, the 20 standard req fields tokens and the 4 custom req fields tokens are available for use. When the message generates, the req field tokens resolve to their original assigned value and display in the generated message.



Req field merge tokens follow general merge token use rules. If a token is not expected to work in a particular type of message, the token is ignored, blank spaces display, and the message is sent without error.

For more information regarding merge token rules, refer to *Event Manager Administrator and User Guides*.

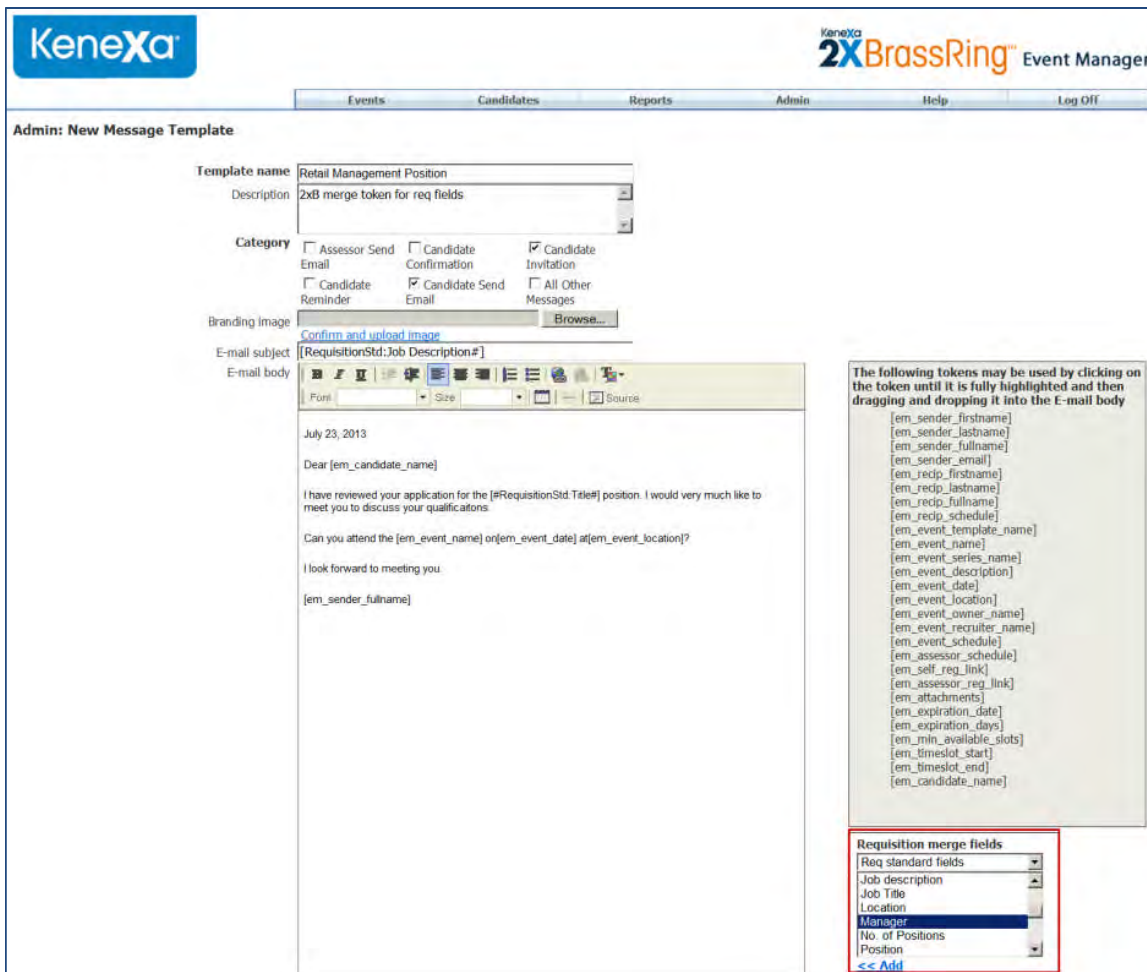
Req field merge tokens display in a widget box below merge tokens on Event Manager message pages. EM Users can access req field merge tokens on the following Event Manager message pages when the candidate:

- Message template page (New and Edit)
- Send Message or Send Email Action (Unscheduled/Scheduled Candidates, Candidate Search, New/Edit Event Candidates tab)
- Edit Message pop-up windows (available on Event Sequence/Event Batch page, Send Invitation [Candidate], and Send Invitation [Assessor])
- iCalendar file configuration (attached to email messages)

When enabled, EM Users can add 2xB req field merge tokens when sending:

- event invitation, confirmation, and reminder messages to candidates
- event team confirmation and cancellation messages
- ad-hoc messages to candidates via the Send Email action
- event change candidate notifications

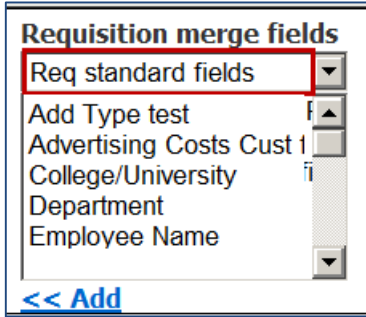
The requisition merge field widget displays on Event Manager template pages below the EM merge token selection box.



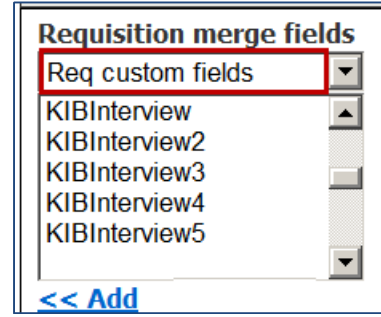
The requisition merge field widget allows EM Users to add standard and custom req field merge tokens to communication templates and messages. The drop-down menu on the widget lets users toggle between standard and custom req field merge tokens.

To add req field merge tokens to a message, EM Users highlight a req field merge token and click **Add**.






OR toggle to view custom req fields,  
highlight a custom req field, and  
Click **Add**.



All 2xB standard and custom req fields are available to use as EM Req Field merge tokens except the following:

- Requisition Team
- Approval Router
- Keyword
- DateReposted
- CNPDelivery
- Custom req fields of the type Label and Grid

When this feature is enabled, Event Manager Users can use these req field merge tokens when sending event invitations to candidates and event team confirmation and cancellation messages.

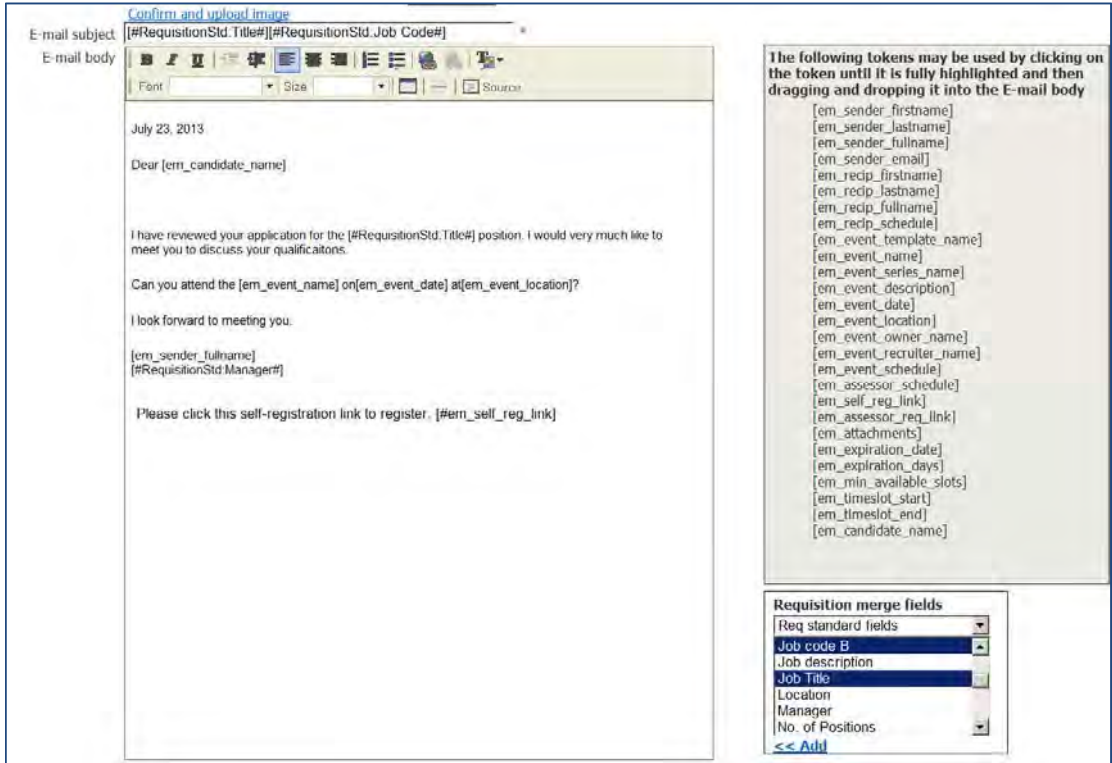


This feature is enabled by default and is available for EM Users sending event messages. EM Users adding default req field tokens to *message templates* must have the Message Template privilege enabled.

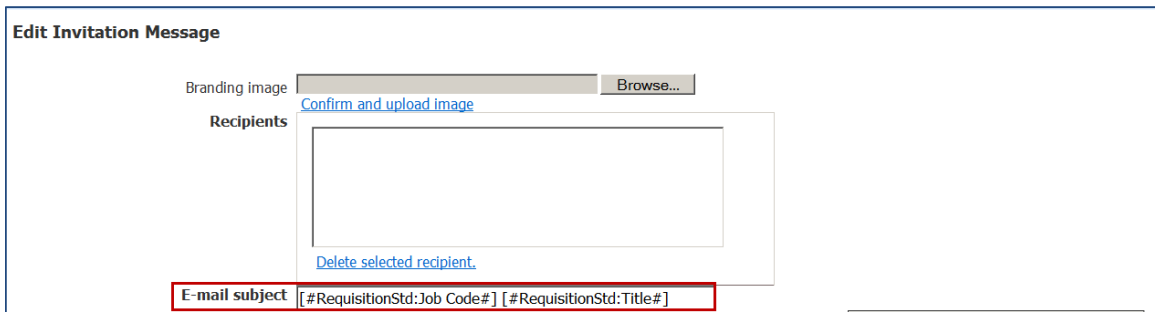
## Event Manager 2xB User/Recruiter Experience

The following example demonstrates how an event recruiter might use this feature. An event recruiter has configured an event and a message template using the 2xB custom req field merge tokens. The recruiter notices he needs to invite more candidates to the upcoming event.

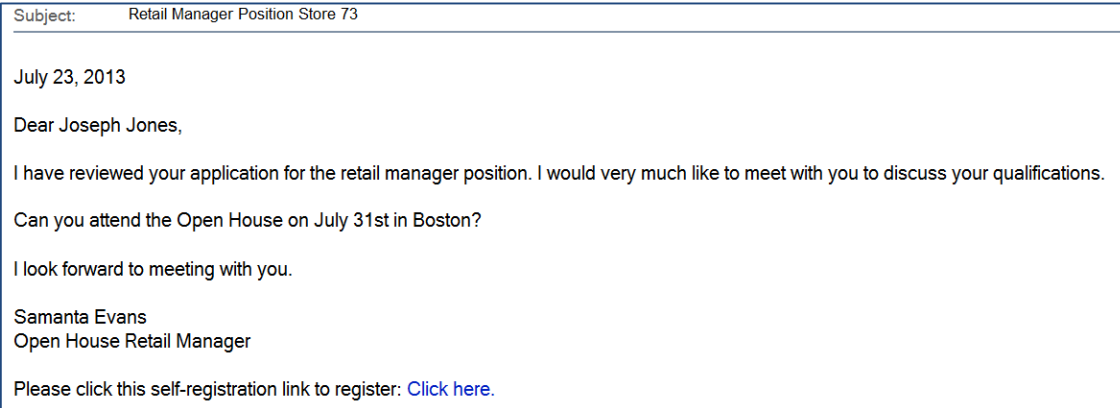
1. Event recruiter accesses the Candidate Search > Unscheduled Candidates, and clicks **Send Invitation**.
2. Event recruiter adds the standard requisition fields, Job Code and Job Title to the email subject line using the widget.
  - Recruiter positions the cursor in the email subject line.
  - Recruiter highlights the Job Code and Job Title in the widget and clicks **Add**.



The Job Code and Job Title standard requisition merge tokens display in the email subject line.



- Event recruiter clicks **Save**.  
The Send Message Invitation Page redisplay.
- Event recruiter completes all fields on the Send Invitation Page and clicks **Send**.  
The candidate receives the email invitation noting the subject line specifying the requisition associated with the invitation.



The candidate clicks the self-registration link in the message body and registers for the event. The Event Recruiter receives an email confirming the candidate's registration and the Event Summary and Event Roster pages update with the candidate's registration information.

## Limitations and Known Issues

If req field merge tokens are used in candidate messages for candidates NOT associated with a req or the req field merge token is not used in the associated 2xB req, blank spaces will display in generated messages because there is no content to generate.

## How Do Clients Get This Feature?

This feature is enabled via a System > General setting, **Enable 2xB Req Merge Tokens**.

1. Navigate to **Admin > System > General** page.
2. Select the Yes radio button for **Enable 2xB Req Merge Tokens**.
3. Click **Save**.

2xB user who can view standard and custom req fields in 2xB can use those Req merge tokens in Event Manager.

## New Email Merge Tokens

With the introduction of three new email merge tokens; Candidate Full Name, Timeslot Start, and Timeslot End, EM Users can now clearly identify EM candidates and their event timeline commitments when sending email messages within Event Manager using:

- New/Edit Message Template pages
- Send Message pages
- Edit Invitation Message Pop Up windows
- Edit Confirmation Message Pop Up windows
- New/Edit Reminder Message Pop-up windows
- New/Edit iCalender files
- Candidate Reminder Messages

This feature is particularly useful in automatically generated event team notifications:

- Event Team Confirmation messages – sent when candidates schedule to an event
- Event Team Cancellation messages – sent when candidates cancel out of an event

The email merge tokens Candidate Full Name and Time Slot Start can be used in both the email message body and subject line.


Previously, the existing em\_recip\_name token displayed the candidate name on all messages where the candidate was the recipient. The use of the em\_recip\_name token is still valid and can be used.

### Message Token Specifics

The following table outlines guidelines and configuration details regarding the new email merge tokens.

Message Tokens	Description
<p>Use this token to specify the start of a candidate's time slot.</p> <p><b><u>For non-remote events:</u></b>  <u>Manually scheduled candidates</u> - the time slot start is based on the event Default Time Zone (System Scheduling &gt; Default Time Zone)</p> <p><b><u>For remote events</u></b>  <u>Self-Registered candidates:</u>            The time slot start time derives its time from the Time Zone the candidate selects when registering for the remote event.</p> <p><u>For Event Team Notifications:</u>            For the Event Team notifications, this token based on the time zone associated with the 2xB user record if the client setting "Time/ Date Display by user's Time Zone" is turned on in Workbench.</p> <p>If there is no time zone associated with the user profile, then the default time zone configured at the client level is used. If the client setting "Time/ Date Display by user's Time Zone" is turned off, then the time will displays based on the default event time zone (System Scheduling &gt; Default Time Zone).</p> <p>Use this token when configuring and sending candidate emails in the following messages:</p> <ul style="list-style-type: none"> <li>• Event Team Confirmation Message</li> <li>• Event Team Cancellation Message</li> <li>• Candidate Confirmation Message</li> <li>• Event Change Notification to Candidate Message</li> </ul>	<p>[em_timeslot_start]      hour:minutes:AM/PM            Abbreviated time zone name            (for example, EST)            (event dependent)</p>
<p>Use this token to specify the end of a candidate's time slot.</p> <p><b><u>For non-remote events:</u></b>  <u>Manually scheduled candidates</u> - the time slot end time derives its time from the event Default Time Zone (System Scheduling &gt; Default Time Zone)</p> <p><b><u>For remote events</u></b>  <u>Self-Registered candidates:</u>            The time slot start derives its time from the Time</p>	<p>[em_timeslot_end]      hour:minutes:AM/PM EST            Abbreviated time zone name            (for example, EST)            (event dependent)</p>

Message Tokens	Description
<p>Zone the candidate selects when registering for the remote event.</p> <p><u>For Event Team Notifications:</u></p> <p>For the Event Team notifications, this token is based on the time zone associated with the 2xB user record if the client setting "Time/ Date Display by user's Time Zone" is turned on in Workbench.</p> <p>If there is no time zone associated with the user profile, then the default time zone configured at the client level is used. If the client setting "Time/ Date Display by user's Time Zone" is turned off, then the time will displays based on the default event time zone (System Scheduling &gt; Default Time Zone).</p> <p>Use this token when configuring and sending candidate emails in the following messages:</p> <ul style="list-style-type: none"> <li>• Event Team Confirmation Message</li> <li>• Event Team Cancellation Message</li> <li>• Candidate Confirmation Message</li> <li>• Event Change Notification to Candidate Message</li> </ul>	
<p>Use this token when configuring and sending candidate emails and in event team messages.</p> <p>This is a list of the ADDITIONAL messages where this token works in addition to all of the messages where the time slot tokens work.</p> <ul style="list-style-type: none"> <li>• Candidate Invitation Message</li> <li>• Send Email from Unscheduled Candidates page</li> <li>• Send Email from Unscheduled view of Candidate Search</li> <li>• Send Email from 2xB view of Candidate Search page</li> <li>• Message pop up in any of the above within History tab of View Candidate page</li> </ul>	<p>[em_candidate_name]      First name, Last name</p>



These new email merge tokens follow general merge token use rules. If a token is not expected to work in a particular type of message, the token is ignored, blank spaces display, and the message is sent without error.

For more information regarding merge token rules, refer to *Event Manager Administrator and User Guides*.

## Event Manager 2xB User/Recruiter Experience

The following example demonstrates how an Event Administrator might use the new email merge tokens when sending candidate invitation messages. Ashley, an event administrator for a US-based company, ABCD, created an event and wants to invite a number of candidates to the event.

Ashley knows the Event Manager time zone is set to Eastern Standard Time (EST). her

1. Ashley creates invitation, confirmation, and event team notification message templates using the new email merge tokens. The content Ashley creates for each template type uses existing merge tokens and incorporates the new email merge tokens. This table outlines how these new email merge tokens could be used in the EM workflow.

Message Template Type	New Email merge token	What Recipient Sees
Candidate Invitation	Candidate Full Name	Candidate receives personalized email message
Candidate Confirmation	Time Slot Start Time Slot End	Candidate receives registration confirmation email message stating their timeline event commitment of start and end time
Candidate Reminder	Time Slot Start Time Slot End	Candidate receives reminder email message stating their timeline event commitment of start and end time.
Event Team Confirmation	Candidate Full Name Time Slot Start Time Slot End	Event team members receive a confirmation email message for each candidate that includes the candidate name, and time slot start and end
Event Team Cancellation	Candidate Full Name Time Slot Start Time Slot End	Event team members receive a cancellation email message that lets team members know who has cancelled and which time slots are now open.

2. Ashley then creates her event and selects the Event Team.
3. Ashley next access the **System > Notifications** page, selects the Event Team confirmation and Cancellation message templates she just created using the new email merge tokens. She also set the Send Before **Event** field to 5 days.
4. Ashley can now create an event batch/event batch sequence and select the templates for Candidate Invitation, Confirmation, and Reminder messages.
5. Ashley next has her Kenexa Support Team member configure a Rules Automation Trigger (RAM) that will initiate based on a candidate's HR status.

When a candidate's HR status reaches the RAM trigger condition, the Event Batch Sequence executes:

- Candidate receives the email message invitation and self-registers for the event.
- Candidate receives an automatically generated confirmation message with their timeline event commitment of start and end time.
- Event team members receive an automatically generated confirmation email message for each candidate that includes the candidate name, and time slot start and end.
- Five days before the event date, candidate receives an automatically generated reminder message with their timeline event commitment of start and end time.
- Event team members receive an automatically generated cancellation notice if candidates cancel their commitments.

Event Team notifications can be configured for event registration confirmation, event change, reminder, and cancellation messages.

## Limitations and Known Issues

These new email merge tokens will not generate any content when used in the following email communications because these messages are not relevant to a specific candidate and cannot resolve to one particular candidate name or one particular time slot start/end time. :

- Send Email to Assessor
  - New/Edit Event Page
  - Assessor Search Page
  - Assessor List Page in Admin
- Event Change Notification to Assessor
- Minimum Available Slots Alert
- Recurring Event Alert
- Assessor Cancellation Alert

If these new merge tokens are used in any of these email communications, merge token rules apply.

## How Do Clients Get This Feature?


The new email merge tokens are available automatically without configuration.

## 2X BrassRing Users

2x BrassRing Event Manager event administrators and EM Users with Message Template User Privileges.

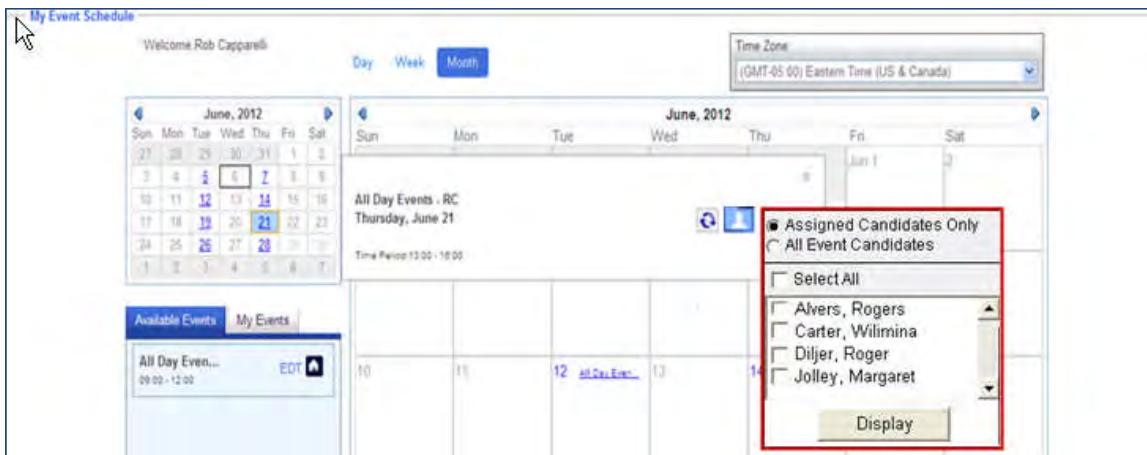
## Assessor's My Schedule Page – Viewing Candidate Pages (053)

A new enhancement on the Assessor My Schedule Page, the People Button, allows Assessors to View candidates pages for registered candidates.

When configured, clicking the People  Button on the My Schedule Page launches a multi-select list box. In this list box Assessors can select and view candidate pages for:

- Assigned Candidates Only - candidates Assessors are assigned to interview, **OR**
- All Event Candidates - all other registered candidates

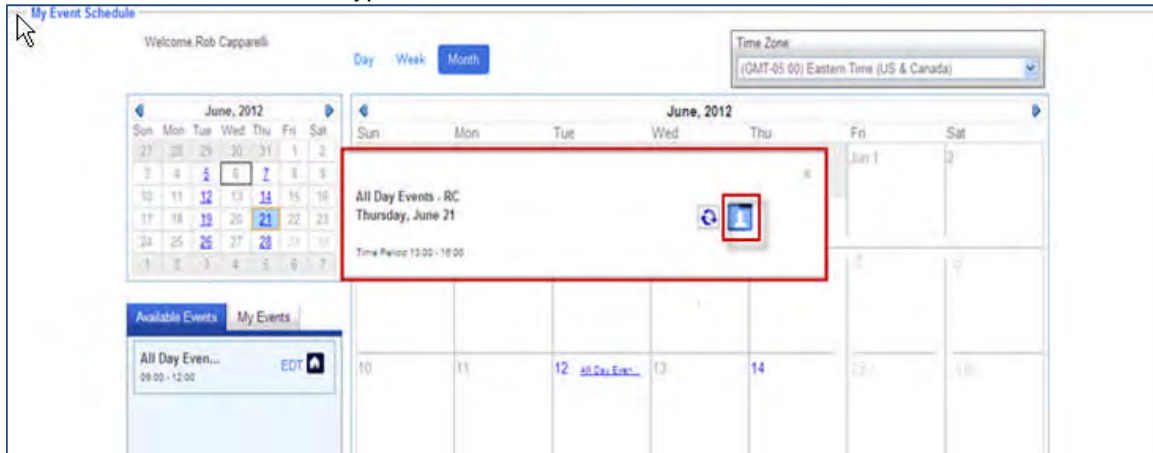
When an Assessor selects either Assigned Candidate or All Event candidates, the multi-select list box repopulates displaying all candidates in the selected category. Assessor can click the 'Select All' option to view all of the candidates' pages within that category, or check the checkboxes next to specific candidates to view only those candidate pages. When the Assessor clicks Display, the selected candidate pages display.



## Event Manager Recruiter/Candidate Experience

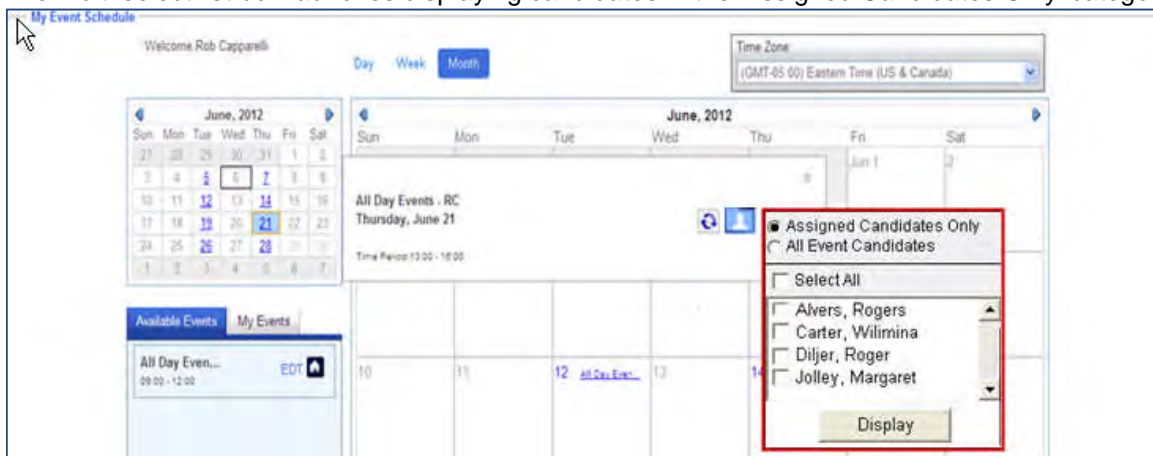
The following example demonstrates how Matthew, an assessor for ABC Company, might use this feature. In this scenario, Matthew has been invited to attend an event via an invitation link and has registered for the event. In preparation for his Assessor role, Matthew decides to review the registered candidates on his My Schedule page.

1. Matthew clicks on the Event Invitation link in the original invitation email to launch his My Schedule page.
2. Matthew clicks on the event hyperlink to launch the event details window.



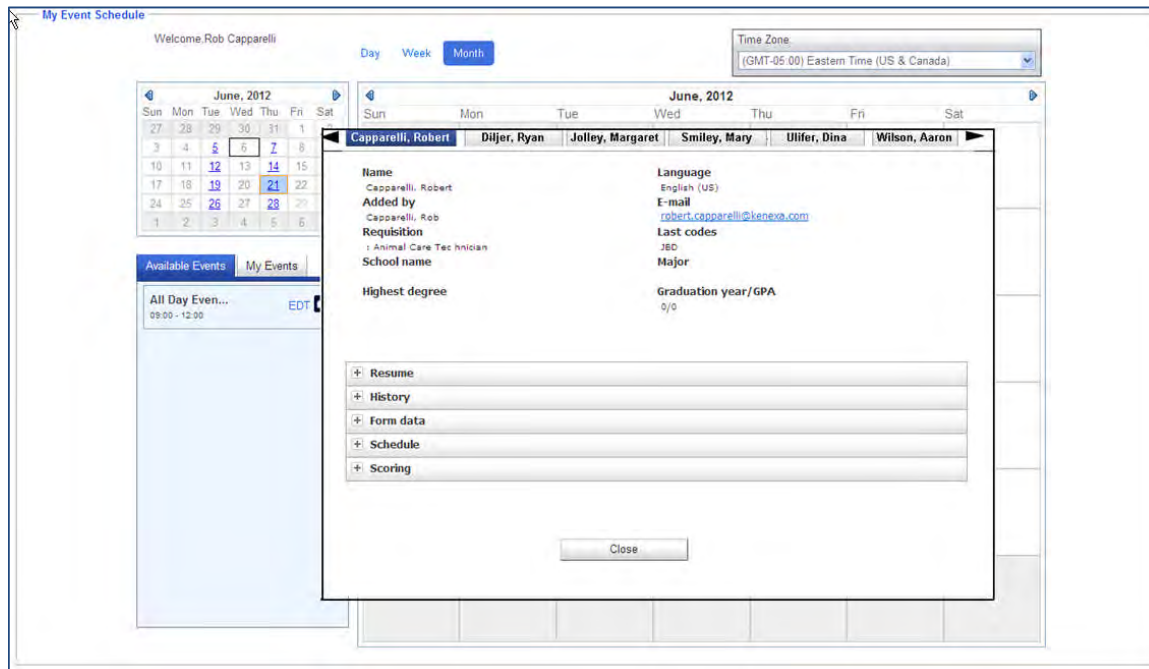
3. Matthew clicks the People button  to view registered candidates.

The multi-select list box launches displaying candidates in the 'Assigned Candidates Only' category.



4. Matthew then clicks the **Select All** checkbox.
5. Matthew clicks **Display** to view candidate pages for the 'Assigned Candidates Only' category and the View Candidate window launches displaying the first six candidates. Matthew clicks on each candidate's tab to view an overview of that candidate's page. Matthew can also click the plus sign (+) on each candidate's record tab to view more detailed candidate information (Resume, History, etc.) Matthew views each candidate page, using the scroll arrows to access the View Candidate window for the next six candidates.

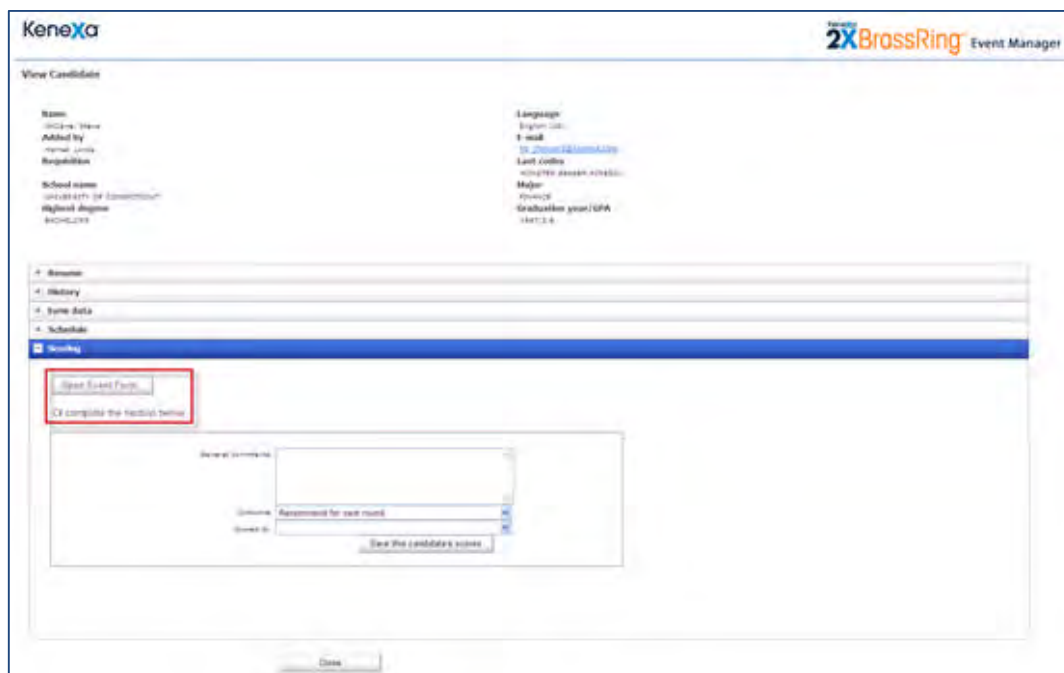




(Optional) If Open Event Forms have been configured, Matthew can:

- Click the Candidate's Scoring Tab
- Click **Open Event Form**
- Complete and submit the Event Form for the candidate after he interviews the candidate

For additional information on configuring Open Event Forms, refer to *Event Manager Administrator's Guide* on the User Resource Center (URC).



6. Matthew reviews all the candidate pages and clicks **Close**.

## Limitations and Known Issues

Assessors cannot view a Candidate's 2xB Talent Record from the Assessor My Schedule page. However, Assessors who are 2xB users can access and view Candidate Talent Records from the Event Manager Event Roster Page.

For additional information on configuring Open Event Forms and for other View Candidate page configuration, refer to *Event Manager Administrator's Guide* on the User Resource Center (URC).

## How Do Clients Get This Feature?

This feature is enabled via a new Admin > System > Scheduling setting, People button on Assessor Schedule.

1. Navigate to **Admin >System > Scheduling** page.
2. Select the Yes radio button for **People button on Assessor schedule**.

Start Day of the Week	Sunday
This is the first day of the week used for any weekly views such as the week view on the My Schedule page for assessor self scheduling.	
People button on assessor schedule	<input checked="" type="radio"/> Yes <input type="radio"/> No
Allows assessors to see the Event Manager records for the scheduled candidates from the My Schedule page	
Check Req Status before self scheduling	<input checked="" type="radio"/> Yes <input type="radio"/> No
Prevents candidates from self scheduling when the req to which the candidate is associated is not in an Open status	
<input type="button" value="Save"/>	

3. Click **Save**.

## 2X BrassRing Users

2x BrassRing EM Administrators, EM Users and Assessors, who may or may not be 2xB or Event Manager Users.

## System Scheduling Settings and Label Changes

### Default registration link expiration

The label and setting on the System > Scheduling setting, 'Enable registration link expiration' has been changed to 'Default registration link expiration.'

The Default registration link expiration setting:

- Defines the rules for the registration links created by manual schedules. For example, if a candidate cancels or reschedules a manual registration, the invitation link is available for rescheduling for the number of days configured in the new "Default registration link expiration" system setting. The default is 14 days.
- Allows EM Administrators to expire registration link based on a configurable number of days after an invitation is sent. Enter the desired default number of days. Choose 0 to never expire registration links.
- Sets client defaults on the Send Invitation page. When configured, EM Users do not need to manually input these values on the Send Invitation page.

**System: Scheduling**

Enable Candidate Registration Locking  Yes  No

Allows the ability to prevent candidates from registering for an event a certain number of days prior to the event. It is configurable by event.

Default Registration Page System Default

This is the default registration page settings for all new events and new event templates

Default registration link expiration 0 days

Allows the ability to expire registration link based on a configurable number of days after an invitation is sent. Enter the desired default number of days. Choose 0 to never expire registration links.

Enable past events reschedules  Yes  No

### Default candidate reschedule restrictions

The label and setting on the System > Scheduling setting, 'Enable candidate reschedule restrictions' has been changed to 'Default candidate reschedule restrictions.'

This change now gives Event Administrators the ability to apply this rule to manually scheduled candidates and to set defaults when sending invitations. By default, it is set to Disabled which disables this rule completely. But, it can be set to any number between 1 – 5 as well as N/A which means the rule is an option but by default it is not enforced.

The candidate can reschedule him or herself for as many times as defined in the new “Default candidate reschedule restrictions” system setting.

Enable candidate overbooking.  Yes  No

Adds overbook limit setting to the time slot configuration window

Default candidate reschedule restrictions 1

Adds ability to restrict the number of times that a candidate can reschedule with an event invitation. "Disabled" means never restrict. "N/A" means allow restrictions, but don't restrict by default.

Default Event Start Time 09 : 00

This value will be used when creating new events.

### New Default Option for Candidate Invitation Restriction

The System > Scheduling page setting, Enable Restrictions for Event Invitations has been enhanced to include a **Set Default** option that determines how far in the future candidates can pick a new time slot.

The Enable Restrictions for Event Invitations setting is used when:

- eLinks are created for manually scheduled candidates
- Sending manual invitations to candidates via the Send Invitation page (becomes the default value)
- Creating new event sequences in event batches

Previously, this System setting allowed only two options, Yes or No. EM administrators can now use the Set Default option to set specific restrictions on event visibility for candidates during registration. The rule is disabled if set to No. If set to Yes, there are three options when you click Set Default:

1. Do not restrict
2. Number of event occurrences
3. Time Frame

Restrict the number of events visible to the candidate by

Do not restrict

Number of event occurrences

Total number to display to candidate

Time frame

Display all events of the type selected that fall within the next

day(s)

week(s)

month(s)

Minimum number of events occurrences to display  
(can display events beyond time frame)

Do not restrict	No restrictions
Number of event occurrences <ul style="list-style-type: none"> <li>Total Number to display to candidate</li> </ul>	When selected, EM Admin can enter a number representing the total number of events to display to candidate.
Time frame <ul style="list-style-type: none"> <li>Minimum number of event occurrences to display (can display events beyond time frame)</li> </ul>	EM Admin can specify the time frame of events visible to candidates in days, weeks, or months and then specify the minimum number of event occurrences to display (can extend beyond the time frame).  Configuring a minimum number is helpful when candidates cannot attend any events within the specified time frame. If the system offers candidates a choice beyond the specified time frame, potential future candidates may register for that event.

For example, an EM Administrator selects the **Set Default**, Number of Event occurrences option and selects:

- Number of event occurrences
  - Total number to display to candidate - 1
- 2 weeks

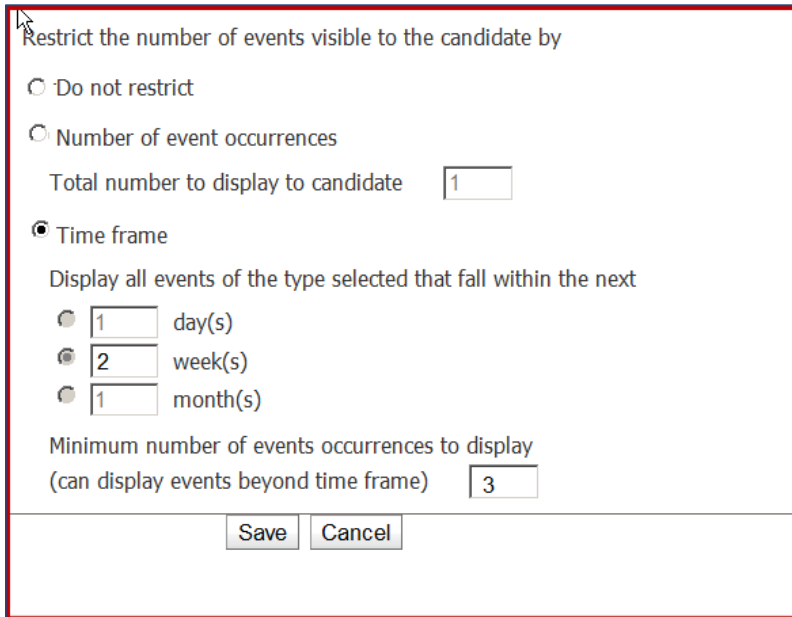
When this EM Administrator sends out candidate invitations, those candidates will only see one event when registering and be restricted to registering for that one event.

Optionally, the EM Administrator can additionally set a **Minimum number of event occurrences to display** in conjunction with the above setting.

## Event Manager Recruiter/Candidate Experience

Stacey, an EM Administrator at a US company, wants to restrict the number of events visible to candidates during registration. Stacey is having difficulty meeting a quota for *one* event scheduled in July, a typical mid-summer vacation time. She is sending out invitations on July 6<sup>th</sup> and is going to use the event invitation restriction so candidates can view only her July event.

The **System Scheduling > System > Enable Restrictions for Event Invitations > Set Default** setting has been configured as follows:



Restrict the number of events visible to the candidate by

Do not restrict

Number of event occurrences

Total number to display to candidate

Time frame

Display all events of the type selected that fall within the next

day(s)

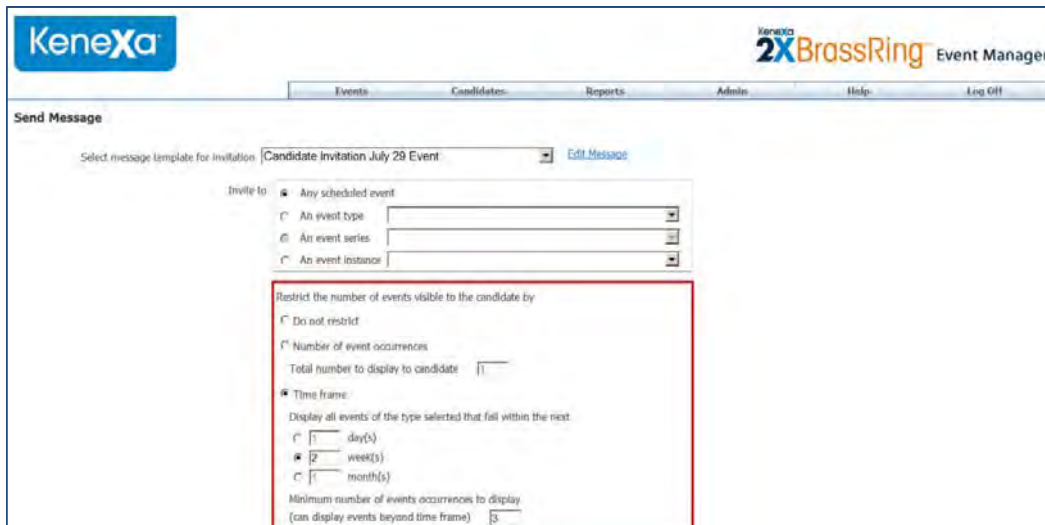
week(s)

month(s)

Minimum number of events occurrences to display  
(can display events beyond time frame)

Stacey navigates to:

1. **Candidates > Unscheduled Candidates.**
2. Stacey selects her candidates and clicks Send Invitation.  
The Send Invitation page launches.



Kenexa 2X BrassRing Event Manager

Events Candidates Reports Admin Help Log Off

Send Message

Select message template for invitation: Candidate Invitation July 29 Event [Edit Message](#)

Invite to:

- Any scheduled event
- An event type
- An event series
- An event instance

Restrict the number of events visible to the candidate by

Do not restrict

Number of event occurrences

Total number to display to candidate

Time frame

Display all events of the type selected that fall within the next

day(s)

week(s)

month(s)

Minimum number of events occurrences to display  
(can display events beyond time frame)

Because the Set Default options have been set in the System Scheduling page, the default setting selections display in the Send Invitation page.

3. Stacey completes the Send Message page and clicks **Send**.



If the Event Default settings are set for registered outcome, cancelled outcome, reschedule outcome, confirmation message, and reminder message fields, Stacey can simply review the settings and click Send.

When Stacey sends out her candidate event invitation, the eLink created for the invitation uses this default system setting and the only event visible to candidates will be her July event.

### How Do Clients Get This Feature?

Event Manager Administrators configure the System > Scheduling options.

## Time Slot Enhancement

EM Administrators and Users can no longer delete active time slots, that is, time slots containing candidates.

## Candidate Search Field Enhancement

Auto-complete functionality is now supported on the Event Manager Candidate Search page. Candidate search fields with more than 200 entries will display as auto-complete text. As you enter characters for the item you desire, options containing those characters are listed (beginning after you enter two characters, with up to ten matches returned at a time).

### How Do Clients Get This Feature?

This new functionality is available automatically without configuration.

# Integrations – 2x BrassRing and Candex

Candex is a leading Recruitment Supplier Management (RSM) technology, and an innovative way for global companies to engage with their recruitment supply chain. Its integration with 2xB enables companies to utilize one vendor globally.


<b>Product</b>	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Integrations - Candex
<b>Release 13.2</b>		
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Additional charges and configuration required – contact your Kenexa Support Team for implementation details.	

## Feature Description

The integration with Candex provides Recruitment Supplier Management (RSM) technology for 2x Brassring clients, acting as a bridge to the “Agency Manager” by the vendor. Benefits of the Candex integration include:

- One vendor worldwide
- Standardized global contracts
- Detailed spending reports
- Detailed performance reports
- Finding new trusted suppliers

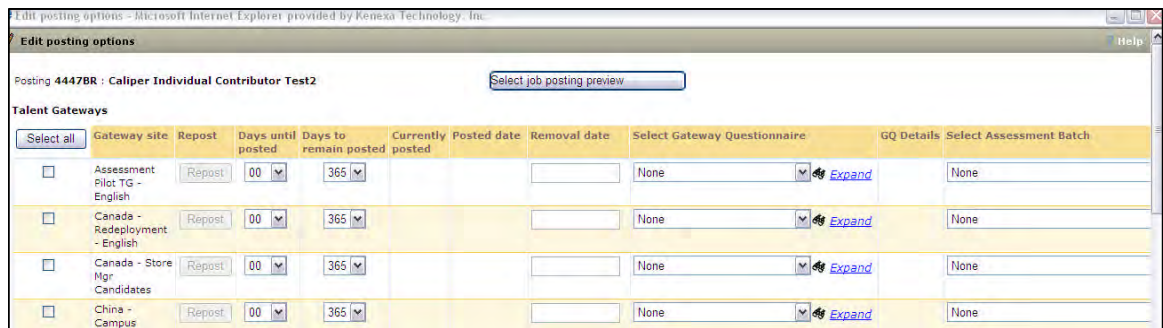
The following sections give a brief overview of the integration.



There is an additional cost associated with this feature. Please contact your Kenexa Support Team for more information about contracting this service.

## Talent Gateway

During implementation of the solution, Kenexa will work with the client to create or identify a Talent Gateway that will be used by the Job Search API for pushing jobs out to Candex. 2xB users simply post the job to the identified TG, and it automatically goes out to Candex.



## Candidate Submittal

Candidate submittal to 2xB can occur through two methods. One option is to allow the candidate to complete the submission on their own. The second option is to allow the agent to submit the candidate directly from within Candex. The client decides which is appropriate. For a given candidate, only one option should be used to avoid duplicate candidate records in 2xB.

- Candidate Link  
A link can be emailed by an agency to a candidate from within Candex. This is a link to a Candex page where some additional processing will occur prior to the candidate being redirected to the job apply URL. When the candidate clicks on the link in the email, the Candex page redirects the candidate to the job apply

URL to complete the submission process. The Talent Gateway should be setup to capture the source of all candidates entering from Candex.

- Submittal through Candex  
Candidates will also be allowed to be submitted directly from Candex through a Candidate Import integration. The Candidate Import is a web service call that can be made to load the candidate into 2xB. Data such as the following would be sent from Candex.

### Ownership Check

Clients work with Candex to determine ownership rules. Prior to actually submitting a candidate to 2xB, the candidate is cross- referenced to determine if the Candex agent has ownership. If so, only then is the candidate submitted and available in 2xB.

### Status Reporting

Status reporting allows Candex to properly verify ownership and track candidate and req status. This is handled by Data Insight Tool.



Requires delivery via ftp. If client is currently sending other reports to an ftp site, this may present challenges for this part of the integration. Additional discovery will need to occur through your services contact.

## How Do Clients Get this Feature?



There is an additional cost associated with this feature. Please contact your Kenexa Support Team for more information about contracting this service.



## Kenexa Tasks

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For configuration information, please see:

- *Candex 2x BrassRing Configuration Guide*
- *Candex Implementation Worksheet*

These and other pertinent documents are available on the internal Release 13.2 Launch Portal in the Candex integration folder:

[http://www.kenexanet.com/sites/plp/2xB13\\_2/default.aspx?RootFolder=%2fsites%2fplp%2f2xB13%5f2%2fShared%20Documents%2f13%2e2%20Enablement%20Slides%2fCandex&FolderCTID=&View=%7bC9162A2E%2d4135%2d42BA%2d9D92%2d406B71DB3828%7d](http://www.kenexanet.com/sites/plp/2xB13_2/default.aspx?RootFolder=%2fsites%2fplp%2f2xB13%5f2%2fShared%20Documents%2f13%2e2%20Enablement%20Slides%2fCandex&FolderCTID=&View=%7bC9162A2E%2d4135%2d42BA%2d9D92%2d406B71DB3828%7d)

# Integrations – 2x BrassRing and Scout


The integration of 2x BrassRing with Scout offers clients a convenient recruiter marketplace, providing the ability to get jobs out to specialized recruiters for candidate submittal.

<b>Product</b> RDP 685 Release 13.3	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Integrations - Scout
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Additional charges and configuration required – contact your Kenexa Support Team for implementation details.	

## Feature Description

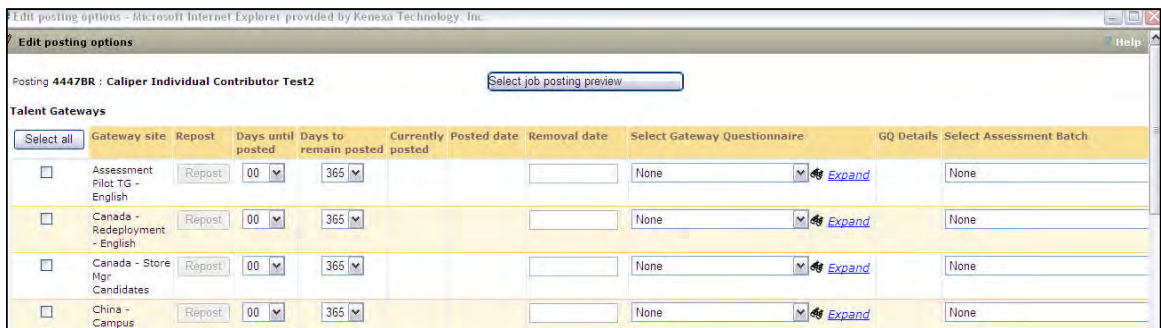
The integration of 2x BrassRing with [Scout](#) offers clients a convenient recruiter marketplace, providing the ability to get jobs out to specialized recruiters for candidate submittal. Benefits of using Scout include reducing time to hire and reducing agency expenses. Highlights of the integration include:

- Jobs are posted to the identified Talent Gateway and pulled to Scout through the Talent Gateway Search API.
- Single Sign On experience to Scout system via a quick link on 2xB user’s dashboard. 2xB users can use the link to access Scout to perform any necessary Scout-specific functions.
- Two methods of candidate submittal:  
Directly, from recruiters in Scout  
Candidate completes application via routed TG link
- Req and candidate status reporting through Data Insight Tool

 There is an additional cost associated with this feature. Please contact your Kenexa Support Team for more information about contracting this service.

## Talent Gateway

During implementation of the solution, Kenexa will work with the client to create or identify a Talent Gateway that will be used by the Job Search API for pushing jobs out to Scout. 2xB users simply post the job to the identified TG, and it automatically goes out to Scout.



Only full talent gateways are supported. All jobs posted to this gateway would be received by Scout.

## Candidate Submittal

Candidate submittal to 2xB can occur through two methods. One option is to allow candidates to complete the submission by accessing a TG via a link routed/emailed to them. The second option is to allow the agent to submit the candidate directly from within Scout. The client decides which is appropriate. For a given candidate, only one option should be used to avoid duplicate candidate records in 2xB.

- **Candidate Link**  
A link can be emailed to a candidate from within Scout. This is a link to a Scout page where some additional processing will occur prior to the candidate's being redirected to the job apply URL. When the candidate clicks on the link in the email, the Scout page redirects the candidate to the job apply URL to complete the submission process. The Talent Gateway should be set up to capture the source of all candidates entering from Scout.
- **Submittal through Scout**  
Candidates will also be allowed to be submitted directly from Scout through a Candidate Import integration. The Candidate Import is a web service call that can be made to load the candidate into 2xB.

### Status Reporting

Status reporting allows Scout to properly verify ownership and track candidate and req status. This is handled by Data Insight Tool.



Requires delivery via ftp. If client is currently sending other reports to an ftp site, this may present challenges for this part of the integration. Additional discovery will need to occur through your services contact.

### How Do Clients Get this Feature?



There is an additional cost associated with this feature. Please contact your Kenexa Support Team for more information about contracting this service.

# Kenexa Tasks

For internal configuration information, please see:

- [Scout Implementation Worksheet](#) and [Solution Design Doc](#)
- [Configuration Guide](#) (can be used for additional assistance – setup follows same principles as this integration)

These and other pertinent documents are available on the internal Release 13.3 Launch Portal in the Scout integration folder:

[http://www.kenexanet.com/sites/plp/2xB13\\_3/default.aspx?RootFolder=%2fsites%2fppl%2f2xB13%5f3%2fShared%20Documents%2f13%2e3%20Enablement%20Slides%2fScout%20Integration&FolderCTID=&View=%7b2FC21E0A%2dF838%2d43C7%2d8E6A%2dA6315C973C1E%7d](http://www.kenexanet.com/sites/plp/2xB13_3/default.aspx?RootFolder=%2fsites%2fppl%2f2xB13%5f3%2fShared%20Documents%2f13%2e3%20Enablement%20Slides%2fScout%20Integration&FolderCTID=&View=%7b2FC21E0A%2dF838%2d43C7%2d8E6A%2dA6315C973C1E%7d)

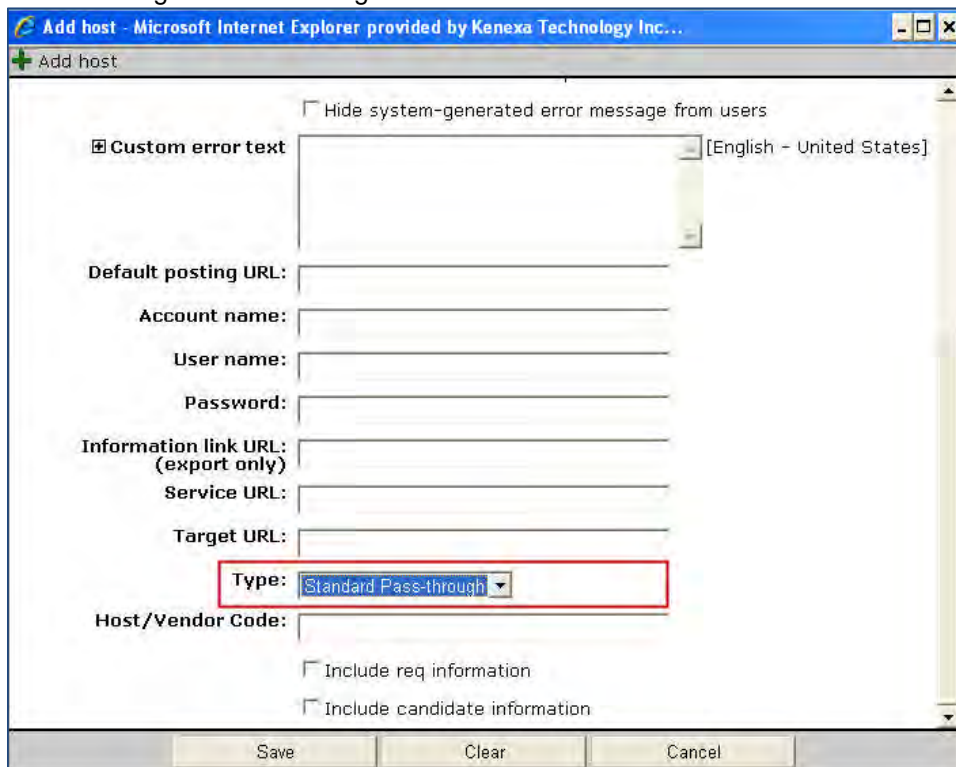
Two additional items are required for setup :

- Custom Agency candidate form – see *Implementation Worksheet*
- Quick link setup – see following section.

## Quick Link Setup

### 1. External host setup

Tools -> Integrations -> Manage hosts -> Add/Edit host



The manage hosts area within WB must include the following web service parameters:

- Account Name (client account ID from external system)
- User Name (for web service)
- Password (for web service)
- Service URL (for web service)

- Type (use Standard Pass-through)
- Vendor Code (use a common vendor ID)

Check the Include req information/Include candidate information checkboxes. When checked, 2xB sends standard req/candidate fields to external system.

## 2. Quick Link Setup

Set up as usual and select a host instead of entering a static URL.

**Tools > Settings > Panel configuration > Quick Links Administer configurations > Add/edit configuration**

Select the radio buttons for **External Link**, **Select host** type, enter name of Quick Link in the text box, and click **Add**.

Multiple links can be configured to get to different pages on the Scout side (provided the URLs are different for Scout's internal pages).

# Integrations – Additional Background Check Vendors

Verifications, Inc. and Orange Tree are now available to clients as background check vendors. Both are providers of employment screening solutions

<b>Product</b> RDP 757 RDP 871	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Integrations – Background Check
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.	

## Feature Description

New vendors Verifications, Inc. and Orange Tree have been validated by the Common Service Integration back-end tool, designed for easier integration with background check vendors. See the general configuration instructions for more details – with links to internal documents [Verifications, Inc worksheet](#) and [Orange Tree worksheet](#) – in the Kenexa Common Service – Background Check Integration community.

### [Setup Instructions](#)

For more information about Orange Tree

Verifications, Inc

<http://www.orangetreescreening.com>

[verificationsinc](http://www.verificationsinc.com)

# Integrations – APT Assessments

APT (APTMetrics.com) is an additional assessments vendor now available for configuration. Candidates can automatically be redirected to the requisition designated assessment via Gateway Questionnaires configured to integrate with APT.

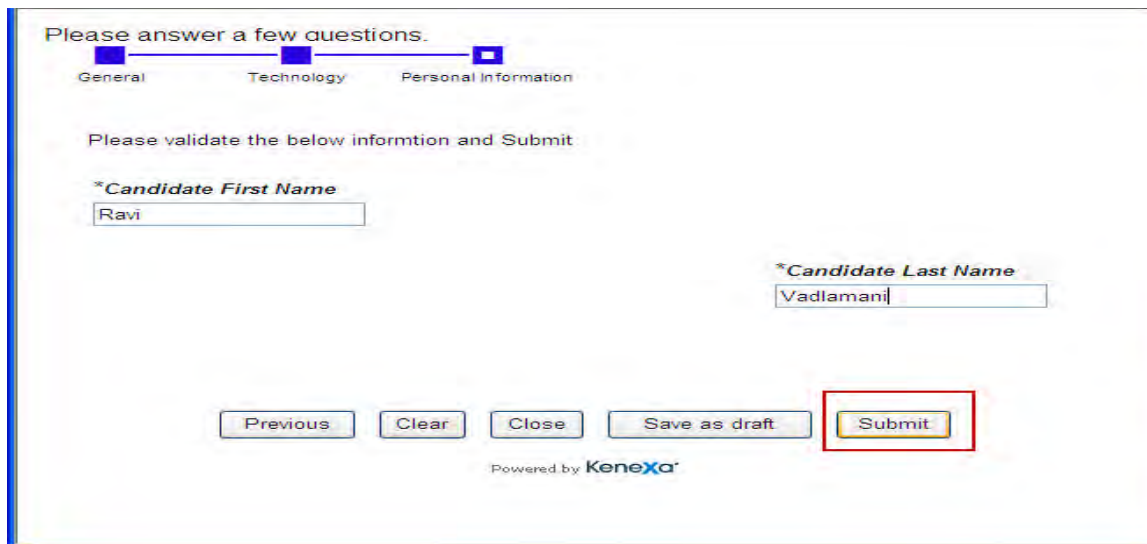
<b>Product</b>	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Integrations - Assessments
<b>RDP 719 Release 13.3</b>	<input checked="" type="checkbox"/> Workbench Self-Service	<input checked="" type="checkbox"/> Gateway Questionnaires
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.	

## Feature Description

APT ([APTMetrics.com](http://APTMetrics.com)) is an additional assessments vendor now available for configuration. Candidates can automatically be redirected to the requisition designated assessment via Gateway Questionnaires (GQs) configured to integrate with APT. Integration only pertains to the launching of the assessment; receiving assessment results into 2xB from APT requires a PSE engagement.

## Candidate Experience

Clicking in a On GQ configured for APT assessments, the candidate clicks the **Submit** button and is redirected to the external host URL via a page refresh.



The screenshot shows a web form titled "Please answer a few questions." with three tabs: "General", "Technology", and "Personal Information". The "Personal Information" tab is active. Below the tabs, there is a prompt: "Please validate the below information and Submit". There are two text input fields: "\*Candidate First Name" with the value "Ravi" and "\*Candidate Last Name" with the value "Vadlamani". At the bottom of the form, there are five buttons: "Previous", "Clear", "Close", "Save as draft", and "Submit". The "Submit" button is highlighted with a red rectangular box. At the bottom center, it says "Powered by Kenexa".

If a candidate applies to more than one requisition at once (multiple submittals), APT will receive all requests for tracking purposes, but only the assessment associated with the first job will be presented.

In case of an error (for example, APT system is down or web service is not reachable), candidates see the a message similar to the following: "You have encountered a system error. We apologize for the inconvenience."



## Limitations and Known Issues

- The integration supports multiple-job apply, but all jobs must share the same assessment. Only the assessment for the first selected job will be given.
- Integration is supported only on English and Spanish gateways
- There is no logging of errors
- There is no means of returning to the assessment at a later time. Candidates are simply redirected to the APT site as part of the application process and “dropped” there.

## How Do Clients Get this Feature?

This feature is controlled by a new “**GQ APT Redirect**” host type in Workbench and the “Redirect to host upon submit” setting on the Gateway Questionnaire’s Next/Submit button tab. Please contact your Kenexa Support Team for more information.

## Configuration by Workbench Self-Service Certified Users

Redirect candidates to APT when they click the GQ Submit buttons via the **Redirect to host upon submit** setting on the GQ Next/Submit button tab.

1. Go to **Tools > Gateway Questionnaires > [GQ selection] > Administer sections/pages > Submit section > Edit properties > Next/Submit button tab**

The screenshot shows the 'Section properties' dialog box with the 'Next/Submit button' tab selected. The 'Display button?' and 'Submit data when 'Next/Submit' is clicked?' checkboxes are checked. The 'Redirect to host upon submit' dropdown menu is open, showing the following options: None, e-Selex host 1, eSelex: host, and APT host. The 'Label' field contains 'Submit' and the 'Tool tip' field is empty. The 'Save', 'Revert to saved', and 'Cancel' buttons are visible at the bottom.

2. Check **Submit data when “Next/Submit’ is clicked?**
3. Select an APT host, to which to redirect candidates when they click the Submit button, from the drop-down. Host must first be created by Kenexa Support Team; all host names with a Host Type = “GQ APT Redirect” will display in the list.



## Kenexa Tasks

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These are the tasks for implementation of this feature:

1. Clients must first work with APT to set up their assessments (and all other applicable setup items).
2. Field mapping must be done to match client fields with the APT XML. In addition, the URL must be set up in the backend. These items will require a work ticket assigned to the Talent Gateway engineering team.
3. You then can set up **GQ APT Redirect** host type in Workbench (see following), and configure GQ Next/Submit button redirect (see details in Self-Service section).
  - Custom field mappings (to be contained in the candidate and req custom resource parent nodes of the request XML) for a given client require a TG maintenance ticket with a list of custom fields to be mapped: Req Template(s)/Req Field for Assessment ID, Candidate Form Fields for Country Code, Region, Disabled, and Veteran. (Country and Region must be ISO codes)
  - Status and results for the assessment must be implemented using a PSE form import. Standard PSE form import integration process applies.

### Workbench

Configure the GQ to have a host of type: **GQ APT Redirect**.

**Tools > Integrations > Manage hosts > Add/Edit host**

The screenshot shows the 'Add host' configuration window. The 'Type' dropdown menu is highlighted with a red box and is set to 'GQ APT Redirect'. Other fields include Host name, Contact name, Phone, Email, Troubleshoot routing email, Host description, Custom error text, Default posting URL, Account name, User name, Password, Information link URL, Service URL, Target URL, and Host/Vendor Code. There are also checkboxes for 'Include req information' and 'Include candidate information'.

The following fields are the only ones on the Host configuration page in Workbench that are needed for the APT integration (other fields, such as Email, may be required by Workbench but will not be used for the integration):

- Host name
- Account name (provided by APT)
- Username (provided by APT)
- Password (provided by APT)
- Type (always "GQ APT Redirect")
- Include req information/Include candidate information checkboxes, both checked (this sends candidate and req standard and custom resource nodes in the XML).

If the required fields for APT cannot be retrieved, the request call will still be made to APT, who will display their error message in such a scenario. Similarly, the call to APT also still be made if the GQ was missing some of the mapped questions or a Req field wasn't filled out.

# Integrations – Assessment Batch Updates for JCDD

Updates to assessment batches are now automatically applied to associated Job Code Default Data. Any new reqs created via Save as new action will reflect the updated values.

<b>Product</b>	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Workbench
<b>RDP 684 Release 13.3</b>		
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic – see details below.	

## Feature Description

Previously, when changes were made to assessment batches in Workbench, the updates were not reflected in 2xB. With this feature, when the assessment batch is updated in Workbench, the relevant JCDD default data now gets updated automatically. The Workbench user making the change is prompted when saving the changes:

“Edits made to this batch will also apply to any associated Job Code Default Data.”

If a requisition with batch fields is then “saved as new,” the updates will be reflected in the new requisition. The new req pulls in the current batch configuration for the associated job code (if using JCDD); if no JCDD is available, the new req uses the current configuration found in Workbench. In this case, an alert displays to the user: “The assessment batch associated with this req will be updated to match the most recent configuration.”



Existing requisitions will not be updated, since modifying the requirements of a requisition once candidates have applied could potentially have legal implications. Therefore, clients wishing to update existing reqs can open a maintenance ticket with details of which requisitions and what changes are needed. The reqs can also be manually updated by editing the batch configuration on the req and clicking the “Reset to Default” button.

## 2xB User Experience

When a user creates a new req using the “**Save as new**” option, and an assessment batch field is available on the requisition, the following message appears:

**“The assessment batch associated with this req will be updated to match the most recent configuration.”**

Click **OK** to save the updates and continue to next step, or **Close** to close the pop-up and remain on the same page.

## How Do Clients Get this Feature?

This feature is available automatically without configuration to clients using assessment batches.

# Kenexa Tasks

## Workbench

When an assessment batch is created or edited in Workbench (or from 2xB) the following batch detail data is saved:

- Assessment Batch Name
- Hurdle – Yes or No
- Overall Score – Yes or No
- If Overall Score is Yes, then: Score Type plus all the banding details for the overall score: color, text, min and max for up to 10 bands
- Hurdle Score
- Assessment title
- Assessment Order
- Overall Score Multiplier OR
- Score for HR Status Update
- Banding: color, text, min, max, lifespan for up to 10 bands
- Batch Exemption

Sample edit batch page showing affected fields

#	Order	Hurdle Score	Assessment Title	Banding Score	Overall Score Multiplier	Score for HR Status Update*	Remove
1		45	Advanced Spelling	Select	Configure (Score x 1.00 ) +		X
2		50	[Inactive] Business Writing	Select	Configure (Score x 0.50 ) +		X

Upon saving, any JCDD associated with the batch is updated to match the new configuration.

- System will update only for JCDD, no updates will be made to requisitions that are associated with the batch.
- System will search for all JCDD with at least one batch attached to it, and update accordingly.

# Integrations – Assessment Fields RFA Support

Req Field Association is now enabled for the **AttachAssessments** field and the six custom req fields, **Assessment Batch1** through **Assessment batch6**.

<b>Product</b>	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> integrations - Assessments
<b>RDP 745 Release 13.3</b>	<input checked="" type="checkbox"/> Workbench Self-Service	
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility..	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.	

## Feature Description

This features provides the ability to populate the **AttachAssessments** field and the six custom req fields, **Assessment Batch1** through **Assessment Batch6**, on a req form using the existing Req Field Association (RFA) feature. This helps users select the correct assessment at req creation time.

For example, suppose your organization creates a custom req field called Location and imports the RFA for this field as as a parent field, and either the AttachAssessment req field or Assessment Batch1-6 fields as child fields. These fields then will display a filtered list of options based on the value selected in the custom req field for Location, instead of displaying a complete list of values.

2xB users can take advantage of RFA for these fields in the following workflows:

- Add req with or without Job Code Default Data
- Add req with My req defaults
- Save as draft req
- Save as new req
- Job Code Default Data creation
- Editing existing Job Code Default Data
- My req default data creation

## How Do Clients Get this Feature?

This feature requires an initial import of associations (relationship between parent/child values), performed by Kenexa staff. Please contact your Kenexa Support Team for more information about enabling this feature.

### Workbench Self-Service Certified Users

For configuration of RFA, you should coordinate with the Kenexa Support Team for the initial import of your field associations. You can maintain field associations for fields after they are set up, in:

**Tools > Forms > Reqs > Req forms > Edit custom req fields >Edit field attributes.**

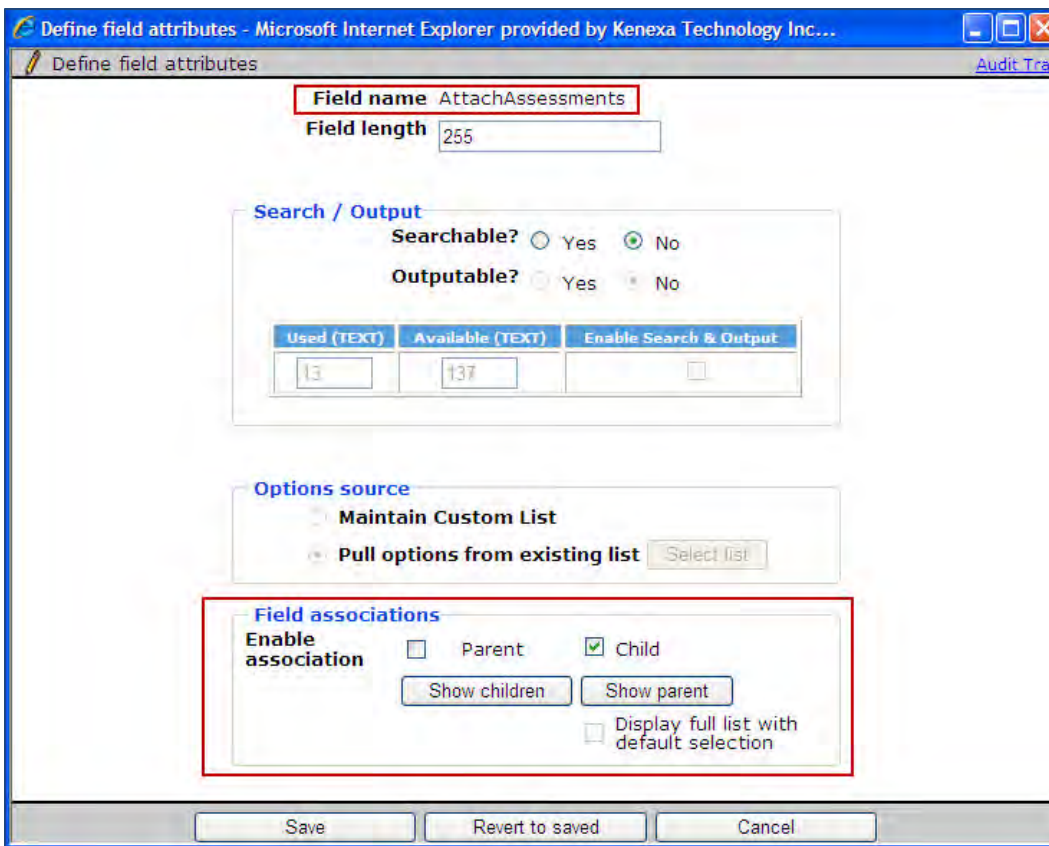
# Kenexa Tasks

Assessment Batch1-6 fields and AttachAssessments field are now enabled and allowed in parent, child req field association functionality.

- These custom req fields can be configured as both parent or child field for RFA, with all the existing business rules for req field association applicable.
- System now allows any of the client’s custom fields to be parent field to these fields

## Workbench

Use the existing Field association configuration at req field level to enable the req field association for these assessment fields (**Workbench > Tools > Forms > Reqs > Req forms > Define custom req fields > Edit field attributes**).



RFA import for these fields can be done via XML import as well as MS Excel import. Use AssessmentIDs. When specifying child options (import does not currently accept the AssessmentName).

# Integrations – Assessments Enhancements

2x BrassRing's Assessments integration now supports dual integration to both 2x Assess and Kenexa Assessments platforms. Several other enhancements have also been made.

<b>Product</b> LDP 136 Release 13.3	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Integrations - Assessments
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility..	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.	

## Feature Description

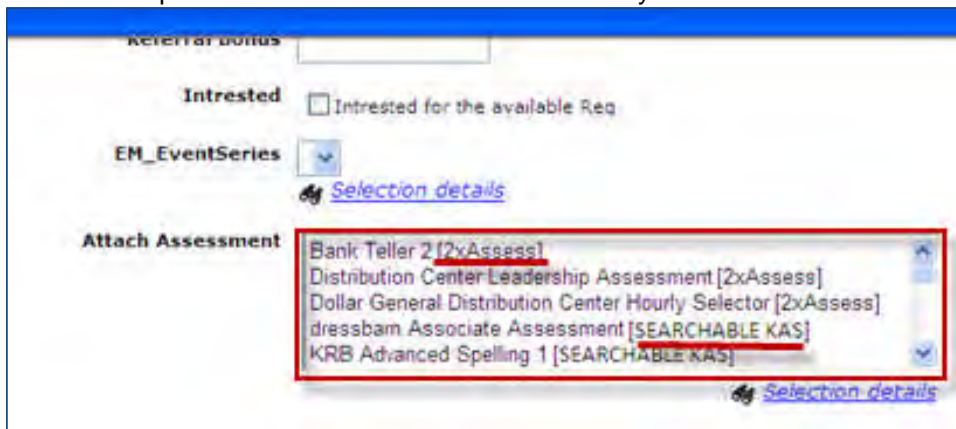
Enhancements to 2xB's integrated Assessments offerings include:

- Support for *dual integration* to both 2x Assess (2xA) and Kenexa Assessments (Searchable KAS using Provelt!) platforms. This is especially beneficial to existing clients desiring to transition from KAS to 2xA. Clients with both integrations enabled can invite candidates to take either 2xA or Provelt! assessments (or both). All of the 2xB functionality that has been available via the "Searchable KAS" client setting is also available with the 2x Assess integration.
- Req Field Association (RFA) now supports both the AttachAssessment field and Assessment Batch 1-6 fields.
- The "Numeric Score" field on the KAS Assessment candidate form has been changed to numeric rather than text. This will apply to all new clients automatically. Existing clients who would like the change made should enter a maintenance ticket requesting that their data be updated (for performance reasons, update is not automatic).
- A new RAM trigger to be available in early summer will automatically copy valid assessment results for candidates when they are updated to a particular HR Status, including 0-filed. This can be useful when candidates are Filed to Req from the candidate search results, Moved/Copied into a new req, Imported, etc. Currently, when manually adding an existing candidate to a Req, the user needs to use the Run Assessment action in order to have their assessment results copied over.
- Workbench configuration changes for dual support are described in the [Kenexa Tasks](#) section, and include: enhancing the form "Assessment Demographic Data Mapping" screen to allow Workbench users (with appropriate access) to add custom fields for the session request sent to the assessment vendor(s).

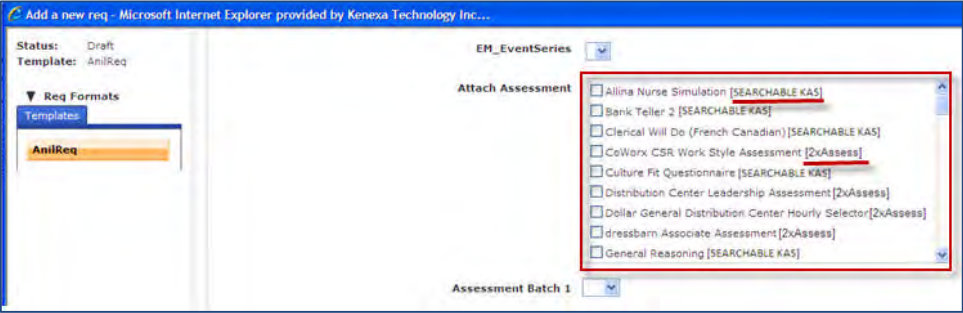
## 2xB User Experience

When more than one vendor is configured, screens where users select or view assessment titles will show a string identifying the vendor appended to the title:

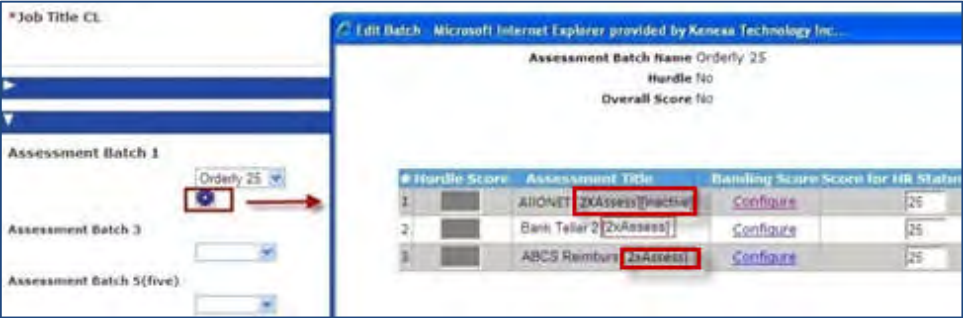
- Add / Edit req screens in both extended and classic layout







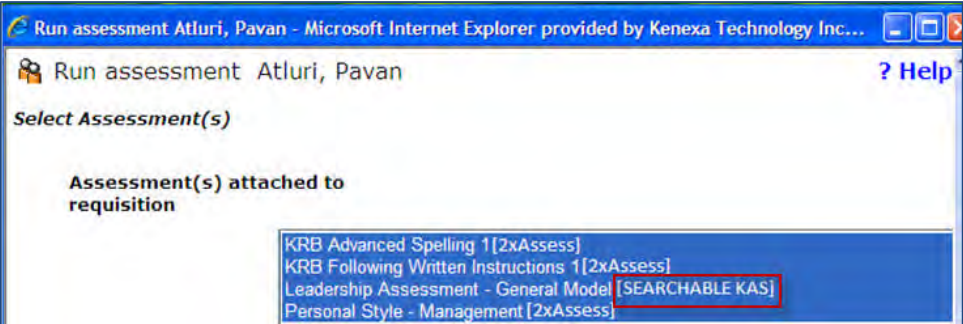
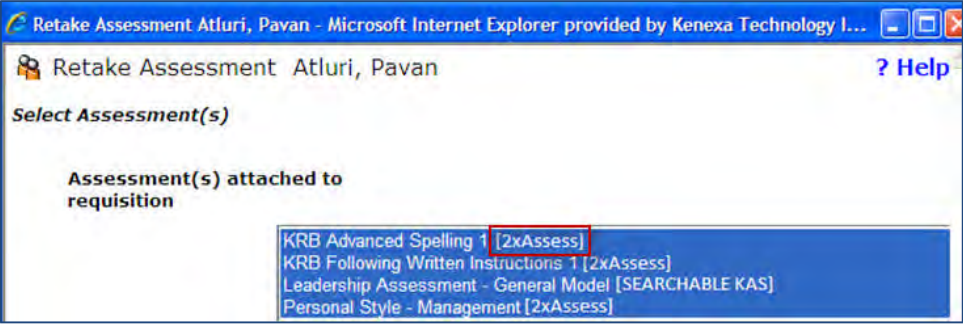
- Edit batch screens in extended and classic layout (Add new req > Assessment Batch (edit configuration icon/link))



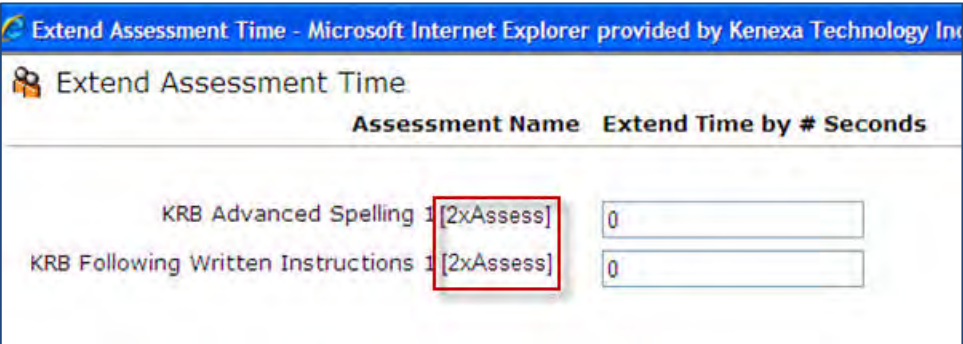
- View req and Req details screens in both extended and classic layout



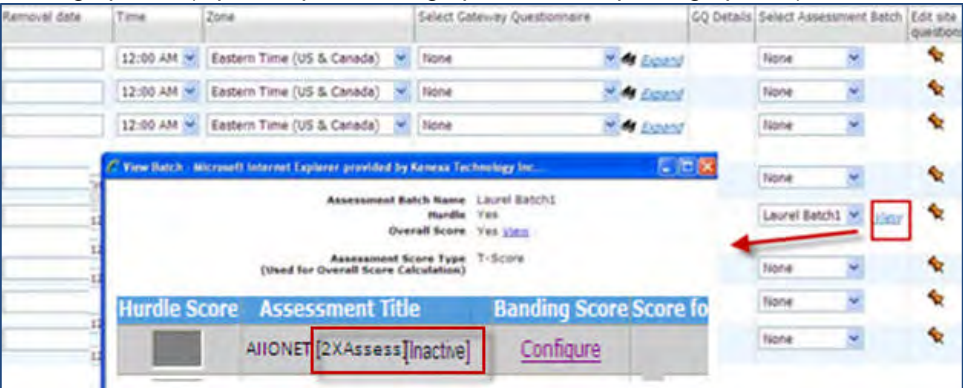
- Retake/ Run assessment (Open Reqs > Req folder > Retake assessment/Run assessment)



- Extend assessment time (Run assessment > Run/Send Extended Time)



- Posting options (Open reqs > Posting options > Edit posting options)



- Talent Record Action log

Action	Date	Action by	Details	Name/Type	From
Assessment Completed	28-Jun-2012	Look,submit and grab	Result: 0%tile	All ONET II [2xAssess]	
Form Added	28-Jun-2012	AVKD, Sivakumar	Form ID: 63289	<a href="#">KAS Assessment</a>	
Assessment Completed	28-Jun-2012	Look,submit and grab	Result: 0%tile	ABCS Reimbursement Support [2xAssess]	
Form Added	28-Jun-2012	AVKD, Sivakumar	Form ID: 63288	<a href="#">KAS Assessment</a>	
Assessment Completed	28-Jun-2012	Look,submit and grab	Result: 9999%tile	Personal Style - Management [2xAssess]	
Form Added	28-Jun-2012	AVKD, Sivakumar	Form ID: 63286	<a href="#">KAS Assessment</a>	
Assessment Completed	28-Jun-2012	Look,submit and grab	Result: 9999%tile	Leadership Assessment - General Model [2xAssess]	
Form Added	28-Jun-2012	AVKD, Sivakumar	Form ID: 63285	<a href="#">KAS Assessment</a>	
Assessment Completed	28-Jun-2012	Look,submit and grab	Result: 25%	KRB Following Written Instructions 1 [2xAssess]	

- Add default req data page (Admin > Admin+ > Codes > Administer code list (for Job Code) > Add/Edit code)



## Candidate Experience

When clients use more than one assessment vendor, the overall candidate experience doesn't change. Talent Gateways and Gateway Questionnaires respect all client's Workbench settings and apply them to both 2xA and KAS. For example, TG text customization, assessment invitation message, landing page link text, summary etc. remain the same for 2xA as for KAS. Pending assessment page does not show the vendor prefix for the assessment titles, since this is not important to candidates. The only appreciable difference is the look and feel between KAS and 2xA, since the user interfaces themselves are a bit different.

## How Do Clients Get this Feature?

This feature is controlled by new client setting options and updated assessment vendor configurations. It is available only for WCAG Talent Gateway. Please contact your Kenexa Support Team for more information about enabling this feature.

# Kenexa Tasks

Workbench areas/screens enhanced/modified for Release 13.3 to support more than one vendor include:

- Multi-Vendor Selection
- Vendor Configuration Screen Changes
- Assessment Field Mapping
- Add New Assessment
- Vendor Name Appended to Assessment Name

Note: Automation Manager Triggers for Searchable KAS work identically for 2x Assess.

See the following sections for summary information on updates, but refer to the updated Integrations with Kenexa Assessments Configuration Guide for complete configuration instructions:



<http://www.kenexanet.com/sites/plp/Assessments/Forms/AllItems.aspx>

Always check for the latest version of the guide before configuring!

## Workbench

### Multi-Vendor Selection

Client settings options now allow you to select both Searchable KAS and 2x Assess (no additional selections allowed when Previsor is selected).

Edit client settings Audit Trail

Integration tab enabled  No  Yes

IntegrationAssessment

- Previsor
- Searchable KAS
- 2X Assess

IntegrationAssessment Considered for/Result  Display hyperlink  Display text only

IntegrationAssessment link expiration (1 - 365)

- All 2xB user type privileges remain the same, and when enabled will apply to both
- All KAS dependencies will be respected for 2xA as well (e.g., in CSR Push to Supplemental if restricted setting section is set to Yes then the "Searchable KAS" is also disabled)
- All WB features that are created or enabled when KAS is enabled will also be created/enabled when 2xA is enabled: custom Req fields, candidate form, assessment configuration items, user type privileges. These will only be created one time when either 2xA, KAS, or both are turned on
- When enabling either 2xA, KAS, or both, the SEARCHABLE\_KAS\_Assessment candidate form will be created and used for both 2xA and KAS results.

## Vendor Configuration Screen Changes

Some changes were made to the configuration screens so that more than one vendor could be configured:

### Tools > Integrations > Assessments > Configure assessment vendor

Configure assessment vendor [Audit Trail](#)

**Assessment vendor:** Searchable KAS

**\*Partner client ID:** kbrstaging

**\*Partner request URL:** http://staging.select2perfo

**\*Partner result URL:** https://qaweb1.brassing.c

**ATS ID:** KRB2

Assessment Batch configuration  
(any changes to this field will reflect to all the configured vendors)

**Default assessment invitation (when sent from 2xB Enterprise):**  [English - United States]

**\*Skills assessments lifespan:** 180 # Days results remain valid

**\*Behavioral assessments lifespan:** 360 # Days results remain valid

Set Lifespan at Assessment Level  
(any changes to this field will reflect to all the configured vendors)

[Configure Field Mapping](#)

Save Revert to saved Cancel

- Assessment vendor is a single-select dropdown with all the vendors that are selected as part of the Integration Assessment client setting. When the value is selected from drop down, the page is reloaded and the rest of the screen content refreshes to suit the selected vendor.
- **Assessment Batch configuration** and **Set Lifespan at Assessment Level** settings apply to all vendors for the client. When **Assessment Batch configuration** is checked, the SEARCHABLE\_KASOverallResult form is created for either/both KAS and 2xA results.
- To prevent the accidental acceptance of erroneous data, toggling to another vendor after the first has been configured does not default data for the new page. For example, if the “Default Assessment invitation...” has been populated, it is blank for the next vendor when you toggle to configure it.
- **ATS ID** label was genericized (from KAS ATS ID).
- **Non-skills Assessments lifespan** label was changed from “Behavioral Assessments lifespan when vendor is 2xA.”

## Assessment Field Mapping

A new enhancement allows Kenexa Workbench users to add custom fields for KAS or 2xA after clicking the renamed **Configure Field Mapping** link (previously called Demographic Data Field Mapping).

The following shows the **Assessment Field Mapping** screen (previously called Assessment Demographic Data Mapping) launched when Searchable KAS is the vendor.

Tools > Integrations > Assessments > Configure assessment vendor > Configure Field Mapping

The screenshot shows a web browser window titled "Assessment Field Mapping - Microsoft Internet Explorer provided by Kenexa Technology Inc...". The page content includes several sections for field mapping:

- Demographic Section:** A table with two columns. The left column lists "Black or African American", "Hispanic or Latino", and "Two or more races". The right column lists "Native Hawaiian or other Pacific Islander" and "White". Each label is next to an empty input field.
- Date of Birth:** A section with a "Date of Birth" label and a "Select form field" button.
- Disability:** A section with a "Disability" label, a "Select form field" button, and two dropdown menus labeled "No" and "Yes".
- Veteran:** A section with a "Veteran" label, a "Select form field" button, and two dropdown menus labeled "No" and "Yes".
- Custom fields:** A section with a "Custom fields" label and a "Select form field" button.

At the bottom, there is a red note: "Note: To delete the existing configuration please click Clear and Save buttons." and three buttons: "Save", "Clear", and "Cancel".

The following Assessment Field Mapping screen is launched when 2xA is the vendor. Currently demographic section applies only to KAS, so those sections are hidden when 2xA is the vendor.

The screenshot shows the same web browser window, but the demographic and other sections are hidden. Only the "Custom fields" section is visible, containing a "Custom fields" label and a "Select form fields" button. The red note and "Save", "Clear", and "Cancel" buttons are still present at the bottom.

To select up to ten fields from the available custom fields, click **Select form fields** for either configuration.

Select the fields on the resulting Search for fields screen. The screen displays searchable/outputtable candidate form fields, custom req fields and standard req fields. The req fields include only those from the Master Req fields:

Job Code, Recruiter, Job Title, Manager, Department, Location/Division, RequisitionID, AutoReqID

Once you **Submit**, the table populates per your selections.

The screenshot shows the 'Assessment Field Mapping' application. It has three main sections: 'Disability', 'Veteran', and 'Custom fields'. Each of the first two sections has a 'No' and 'Yes' dropdown menu and a 'Select form field' button. The 'Custom fields' section contains a table with the following data:

Form name	Field	Field label	XML custom name
Agency response	Date_Field	Date_Field	customfield8
Agency response	radio	radio	customfield1
Allow reapply	Date_Field	Date_Field	customfield2
CFA_Calc	Email	Email	customfield3
CFA_Calc	Date_Field	Date_Field	customfield4
CFA_Calc	Numeric	Numeric	customfield5
CFA_Calc	Radio_Button	Radio_Button	customfield6
Assessment	Single_Select	Single_Select	customfield7
Offer letter	Text_Field	Text_Field	Select
Offer letter	Single_Select	Single_Select	Select

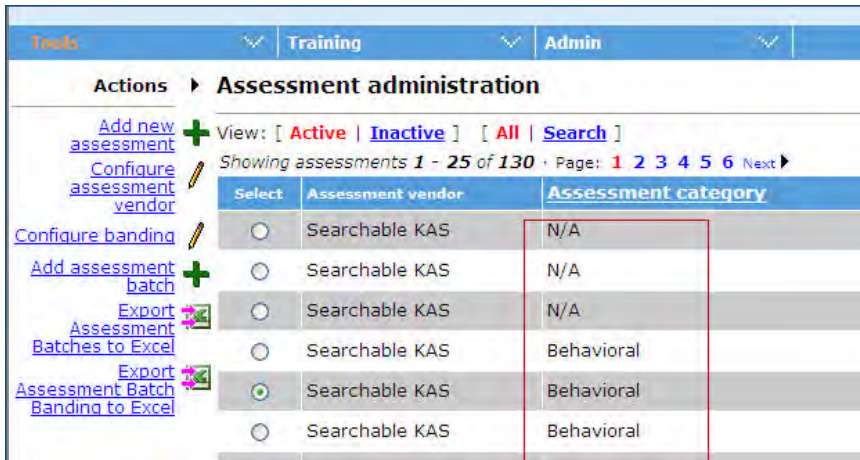
At the bottom of the window, there is a red note: "Note: To delete the existing configuration please click Clear and Save buttons." and three buttons: "Save", "Clear", and "Cancel".

The **XML custom name** column presents a text field when the vendor selected is 2xA, and a single-select list when the vendor selected is Searchable KAS.

- For 2xA the value defaults to DBFIELDNAME for 2xA, but you can supply a unique name of up to 50 characters (no XML).
- For KAS, the list contains predefined node names: [customfield1], [customfield2], [customfield3], etc. In the XML, the custom fields will be inserted just after the "Hurdle" node. They will be sent in numeric order (field1, field2, field3, etc) based on which field has been mapped for each option, regardless of the order they are listed in WB.

## Assessments Administration

The **Tools > Integrations > Assessments** screen includes a new sortable column showing the Assessment vendor name.



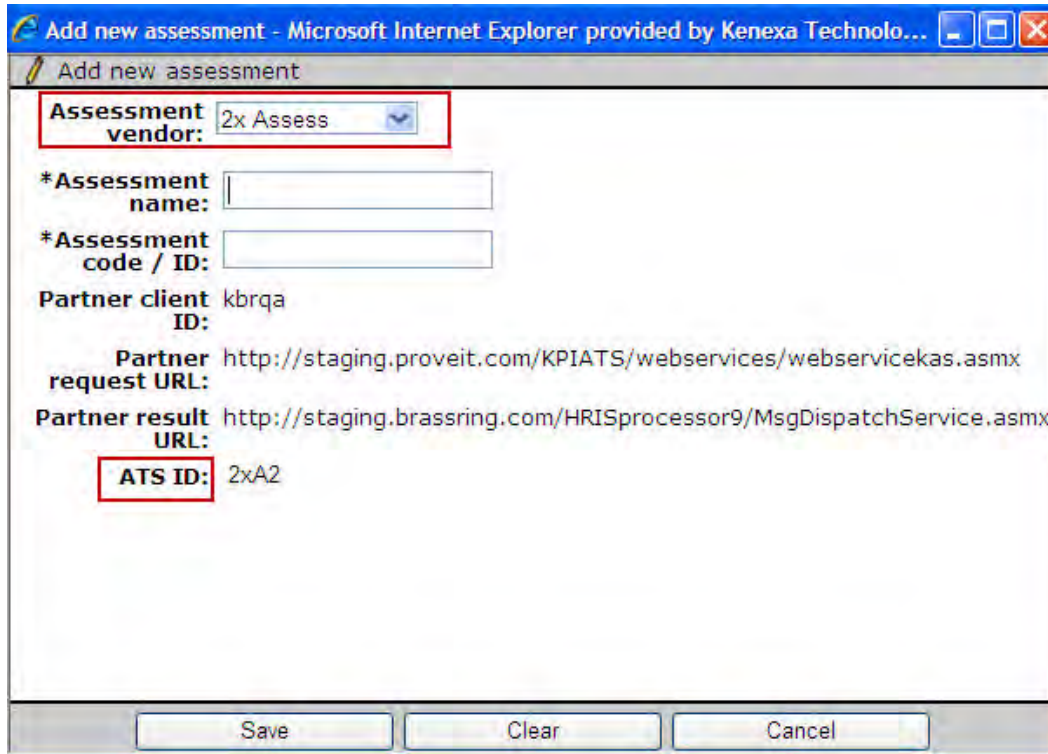
The screenshot shows the 'Assessment administration' section of the application. It includes a sidebar with various actions like 'Add new assessment', 'Configure assessment vendor', and 'Export Assessment Batches to Excel'. The main area displays a table with columns for 'Select', 'Assessment vendor', and 'Assessment category'. The table contains six rows, all with 'Searchable KAS' as the vendor. The 'Assessment category' column shows 'N/A' for the first three rows and 'Behavioral' for the last three rows. A red box highlights the 'Assessment category' column.

Select	Assessment vendor	Assessment category
<input type="radio"/>	Searchable KAS	N/A
<input type="radio"/>	Searchable KAS	N/A
<input type="radio"/>	Searchable KAS	N/A
<input type="radio"/>	Searchable KAS	Behavioral
<input checked="" type="radio"/>	Searchable KAS	Behavioral
<input type="radio"/>	Searchable KAS	Behavioral

Assessment category column shows the appropriate categories per vendor.

## Add New Assessment

The Add new assessment page (**Tools > Integrations > Assessments > Add new assessment**) has been modified to allow users to add assessments for any of the vendors.



The screenshot shows the 'Add new assessment' form in a browser window. The form has several fields: 'Assessment vendor' (a dropdown menu with '2x Assess' selected), '\*Assessment name' (a text input field), '\*Assessment code / ID' (a text input field), 'Partner client ID' (a text input field with 'kbrqa' entered), 'Partner request URL' (a text input field with 'http://staging.proveit.com/KPIATS/webservices/webservicekas.asmx' entered), 'Partner result URL' (a text input field with 'http://staging.brassring.com/HRISprocessor9/MsgDispatchService.asmx' entered), and 'ATS ID' (a text input field with '2xA2' entered). The 'Assessment vendor' and 'ATS ID' fields are highlighted with red boxes. At the bottom of the form are three buttons: 'Save', 'Clear', and 'Cancel'.

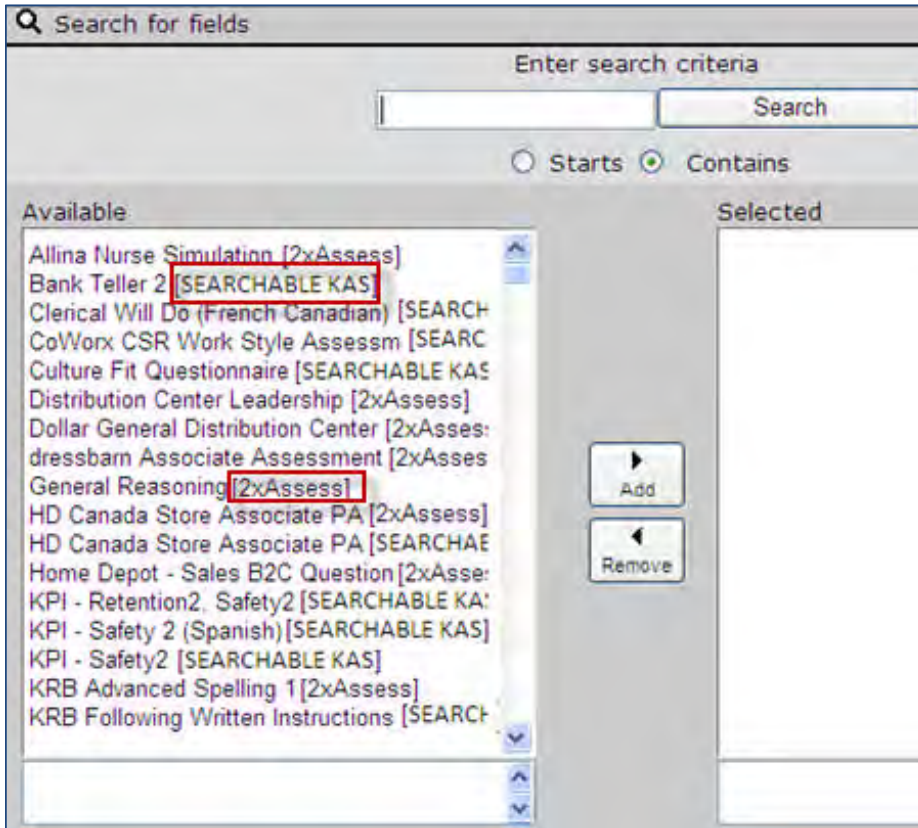
- Assessment vendor is a single-select dropdown with all the vendors that are selected as part of the Integration Assessment client setting. When the value is selected from drop down, the page is reloaded and the rest of the screen content refreshes to suit the selected vendor.
- ATS ID label genericized.



## Vendor Name Appended to Assessment Name

To enable users to select the appropriate assessment, such as when adding assessments to a batch or configuring banding, a string identifying the vendor is appended to the assessment title in the selection screen.

Example: **Tools > Integrations > Assessments > Add Assessment batch > Select Assessment title**



# Integrations – Assessments (KAS) NumericScore Field Type Change

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This feature converts the KAS NumericScore form field from type text to numeric to enable sorting for KAS Assessments.

<b>Product</b> RDP 740 Release 13.3	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Integrations - Assessments
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.	

## Feature Description

This feature converts the NumericScore form field from text to numeric for KAS Assessments for all new implementations. Existing clients may also have the field type converted via a maintenance request. Converting this form field type to numeric enables clients to sort on the NumericScore form field. When numeric, the field values in the NumericScore form field can contain a minimum value of -99999 and a maximum value of 99999. All other form field labels remain the same.

When the KAS Assessment NumericScore form field is converted from to numeric:

- Settings such as Placement, database field name, customized form field name (label), custom report field, Hide for these user types, Non-editable for these user types, and required for these user types, remain unchanged.
- All existing rules of the form field type:text are updated and replaced with rules related to field :numeric.

## 2xB User Experience

When configured, 2xB users viewing KAS assessment results within the Req Folder can now sort candidates based on their numeric scores.

## Limitations and Known Issues

The automatic migration and updating of the KAS Assessment NumericScore form field from type 'text' to 'numeric' for all existing KAS assessments is out of scope. However, clients can request the KAS form field type conversion via maintenance tickets. There is no cost associated with this request.

## How Do Clients Get this Feature?

This feature is available automatically for new KAS Assessment integrations. Please contact your Kenexa Support Team for more information about enabling this feature for existing KAS Assessments clients.

## 2x BrassRing Users

Users must have privileges to both the KAS Assessment form and the NumericScore field.

# Integrations – Assessments Results Copied

A candidate's existing, valid assessment results can now be copied into any receiving reqs with all subsequent submissions.

<b>Product</b> LDP 202 Release 13.3	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Assessments
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.	

## Feature Description

When an assessment is *required as part of the application process on a Talent Gateway/Gateway Questionnaire*, currently results are copied if the candidate has already taken the assessment. This feature addresses workflows when the assessment invitation is either *post-application*, or the candidate is submitted in a means other than application via TG/GQ, including:

- TG/GQ submission without assessments required
- Move/Copy/File to Req
- Candidate Import
- RAM File to Req

The system will now automatically copy a candidate's existing, valid assessment results into any receiving reqs *with all subsequent submissions*. Thus, if the candidate already took the assessment(s) required for a new req, their results are available in the new req almost immediately after they are submitted (processing can require a few minutes). This expedites the candidate review process, particularly in the event the candidate failed the assessment, allowing disposition before a recruiter or hiring manager needs to invest time or effort.

## Copy Behavior

If valid results are not available, either because the assessment has not been completed or because the available results are not within the lifespan based on the receiving req rules, then no further action will be taken for that assessment. Clients still control the sending of the invitation to the candidate to take the assessment; the system does not pre-emptively send an invitation.

For assessment batches:

- If valid results are available for the entire batch then all assessments will be copied over in accordance with the rules of the batch on the receiving req and the Overall Results form will be populated, indicating that the batch is complete.
- If valid results are available for some but not all of the assessments then no action will be taken, only full batch data will be copied.
- Assessment results copied into the receiving req follow the configuration logic of the receiving req. For example, suppose within an assessment batch that "Sales Test1" is required for the receiving req and the candidate has Sales Test1 results already on file with a 70<sup>th</sup> percentile score. In initial req, the cut score was 75, so banding was set as "Failed." In the new req, the cut score is 65, so banding will be set as "Passed."

## How Do Clients Get this Feature?

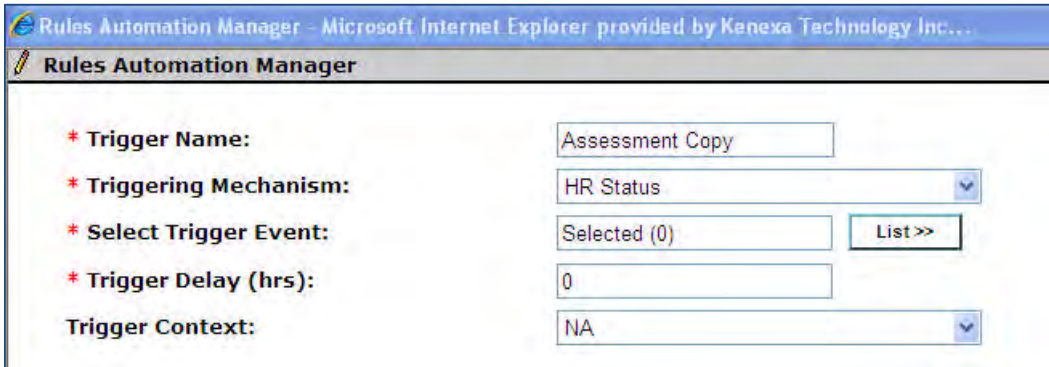
This feature is controlled by updates to the existing "HR Status" Triggering Mechanism in Rules Automation Manager. A prerequisite is that the client setting "IntegrationAssessment" be enabled with the vendor as 2x Assess and/or Searchable KAS. Please contact your Kenexa Support Team for more information about enabling this feature.

# Kenexa Tasks

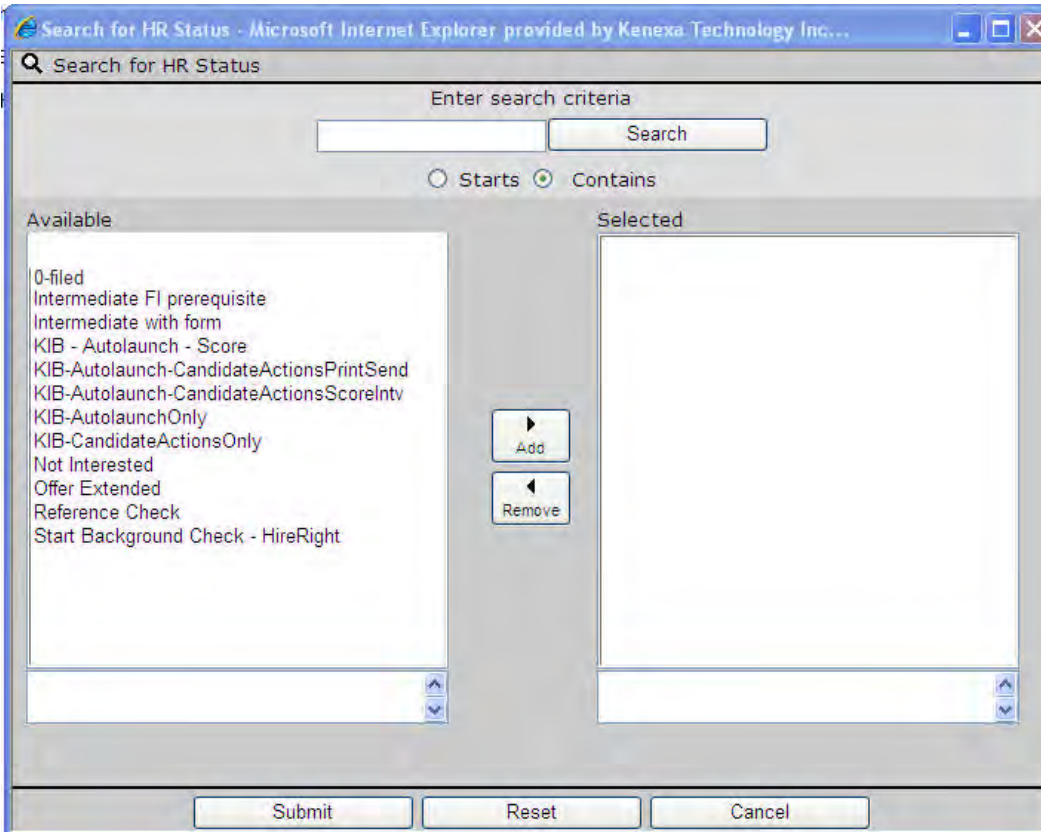
Updates to the existing “HR Status” Triggering Mechanism in Rules Automation Manager provide the functionality for this feature.

## Workbench

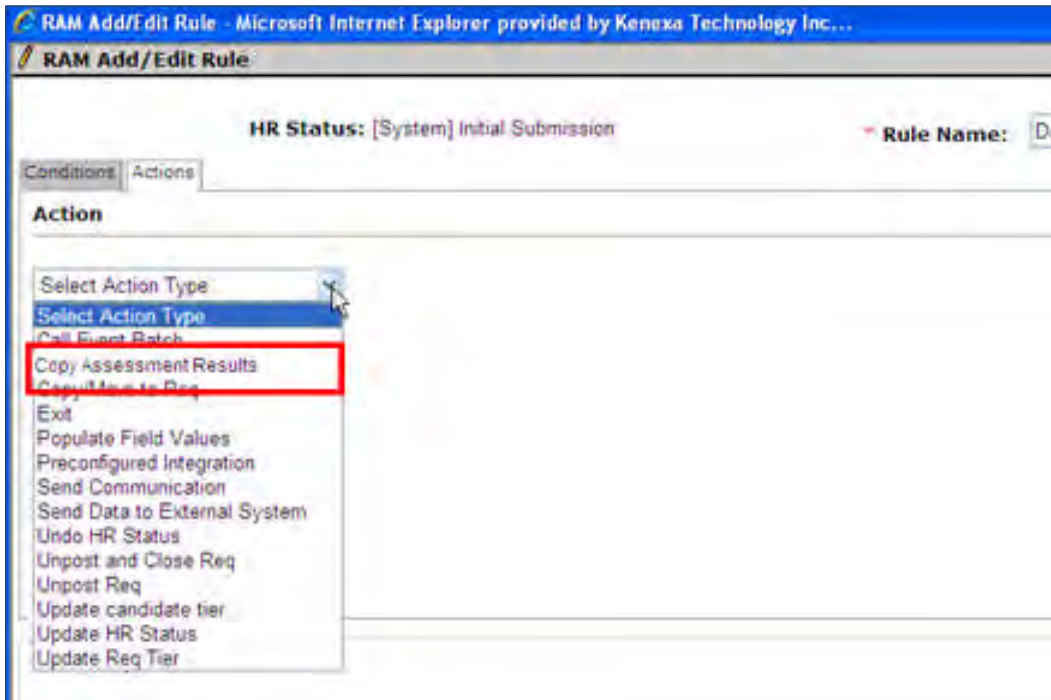
A new system status is available under Rules Automation Manager’s existing Triggering Mechanism of “HR Status” (no changes are required to the screen below).



**0-filed** HR status will be available for selection, and appear at the top to distinguish it from the client’s HR statuses.



A new “**Copy Assessment Results**” RAM action is available when the selected triggering mechanism is “HR Status.” The action copies any valid, required assessment results into the requisition in context.



## Trigger Behavior

When the trigger criterion is met the system:

- Checks the receiving requisition to confirm whether assessments are attached through any of the following fields: AttachAssessment, AssessmentBatch1 through AssessmentBatch6.
- If any assessments are required, the candidate's record is checked to see if there are valid (within lifespan of receiving req criteria) assessments on file.
- If valid assessment results exist, they must be copied into the receiving req, following the configuration logic of the receiving req."
- If valid results are not available, no further action is taken for that assessment (no new record is inserted into "Exscores" table and no invitation is sent).

- In the event of multiple Assessment Batches and/or AttachAssessment selections plus Assessment Batch:
  - AttachAssessment requirements is processed first.
  - System then runs through the logic of AssessmentBatch1 first, next it checks AssessmentBatch2 etc, copying each batch for which all results are available.

### RAM Log

Four new statuses were added for this feature:

1 = [Assessments were successfully copied.]

2 = [No assessments were copied; either no results found or results have expired.]

3 = [No assessments are required for the requisition.]

4 = [System Exception : <Actual Error message>] (i.e., this will display the actual error message returned by the stored procedure or exception returned when attempting to call the stored procedure)

# Integrations – Launch Assessments in New Window

When using 2x Assess assessments, all assessment tests will launch in a new window in order to appropriately control the assessment candidate experience. This feature applies for clients using either 2x Assess assessments alone or using both Kenexa Assessments (KAS) and 2x Assess assessments.

<b>Product</b>	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Talent Gateways
<b>RDP 725 Release 13.3</b>	<input checked="" type="checkbox"/> Workbench Self-Service	<input checked="" type="checkbox"/> Integrations - Assessments
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document sent for each release build.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic (2x Assess) – see details below.	

## Feature Description

This feature gives clients using 2x Assess, or a combination of both 2x Assess and Kenexa Assessments (KAS) products, a modified workflow for candidates. For example, when a candidate applies to a job and an assessment is required, a new window opens and displays the assessment starting page or the language selection page (for assessments available in multiple language). The candidate completes the required assessment and is returned to the Pending Assessment window. There the candidate can initiate the next assessment, or will be presented with text stating that no more assessments are required.

This feature supports the following workflows:

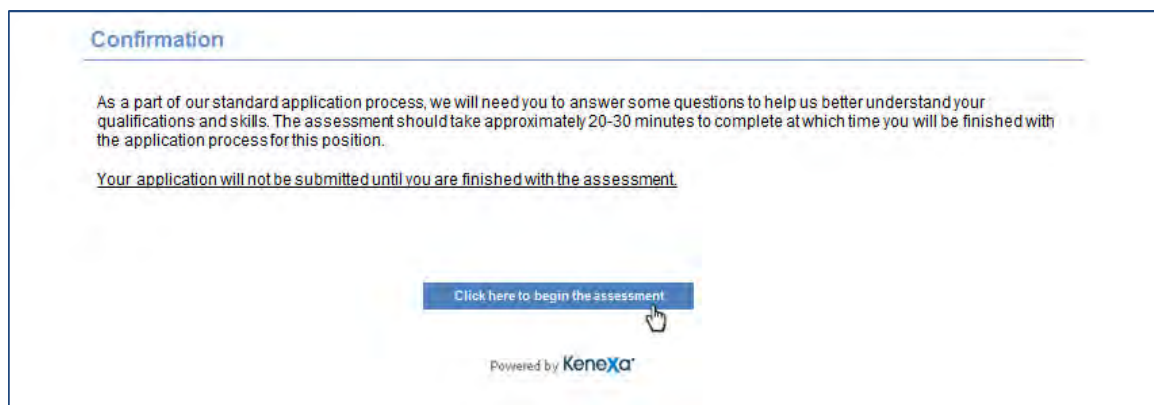
- Talent Gateway (TG) Apply
- Gateway Questionnaire (GQ) Apply
- Standalone Talent Gateway assessment reached by email invitation or TG login > Pending Assessments

Clients using only KAS will continue to have assessments launch in an iFrame within the same window by default (but can set **Launch assessment(s) via new window** TG setting if desired).

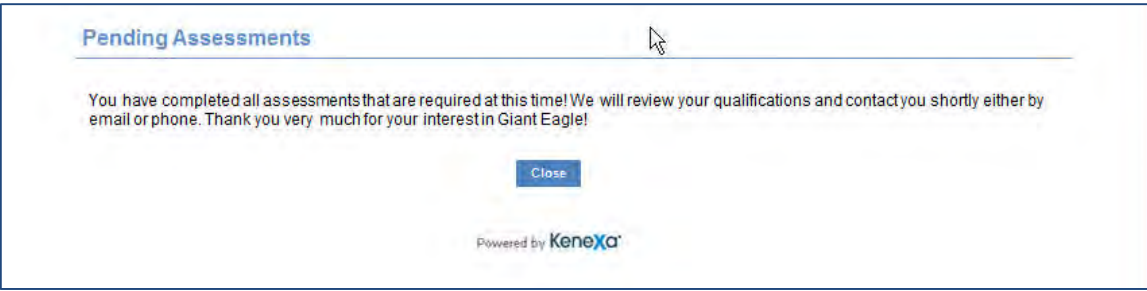
## Candidate Experience

For a job that requires the completion of an assessment, candidate follows this process:

1. Completes the job application and the required assessment displays in a new window.



2. Clicks **Click here to begin assessment** and completes the assessment.

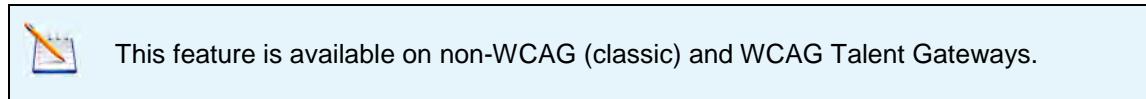


3. Candidate clicks **Close**.

If a job requires the completion of multiple assessments, links to each pending, required assessment display in the Pending Assessments window. Candidate accesses each required assessment and completes each assessment in the same manner as above until all assessments are completed. Candidate then clicks **Close** on the Pending Assessments window.

## How Do Clients Get this Feature?

This feature is available automatically for 2x Assess integrations, either independently or in tandem with KAS.

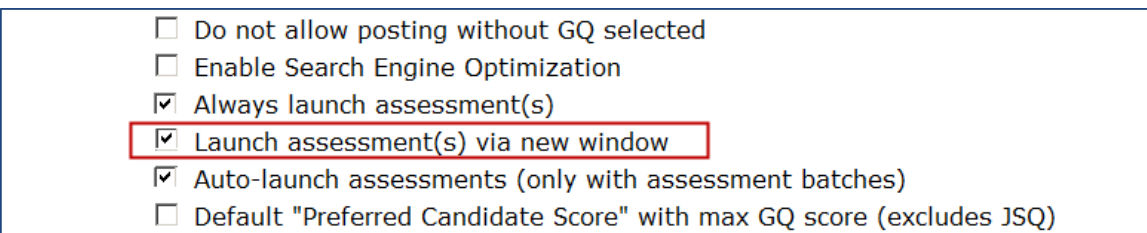


## Workbench Self-Service Certified Users

There are no configuration settings for 2x Assess, nor any applied for Kenexa Assessments when both 2x Assess and Kenexa Assessments are selected vendors; assessments are automatically launched in a new window.

For standalone Kenexa Assessments (KAS is the only selected vendor), the existing TG Admin setting is respected and assessments will launch in a new window *only when the following setting is enabled* (the label of the setting has been modified slightly to reflect the new behavior).

**Tools > Talent Gateways > Edit [selected TG] > Launch assessment(s) via new window.**





# Integrations – Social Source Label Updates

Currently, two Candidate Relationship Management (CRM) preconfigured integrations with 2x BrassRing are available: 2x BrassRing Social Source™ and Avature. Social Source-specific labels in Workbench and 2xB have been genericized to provide a more consistent interface that accommodates clients with either integration.

<b>Product</b>	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Integrations – CRM
<b>RDP 677 Release 13.3</b>	<input checked="" type="checkbox"/> Workbench Self-Service	
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document sent for each release build.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic for clients with integration – see details below.	

## Feature Description

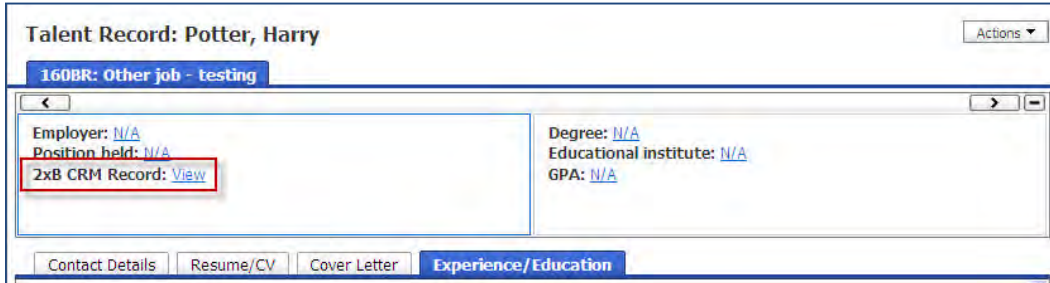
Currently, two Candidate Relationship Management (CRM) preconfigured integrations with 2x BrassRing are available: Social Source and Avature. This change affects accounts with the client setting **Integration Candidate Relationship Management (CRM)** set to either value. Social Source-specific labels in Workbench and 2xB have been genericized to provide a more consistent interface that accommodates clients with either integration.

## Screens Affected in 2xB

### Talent Record Ribbon

This ribbon section is configured to display CRM information.

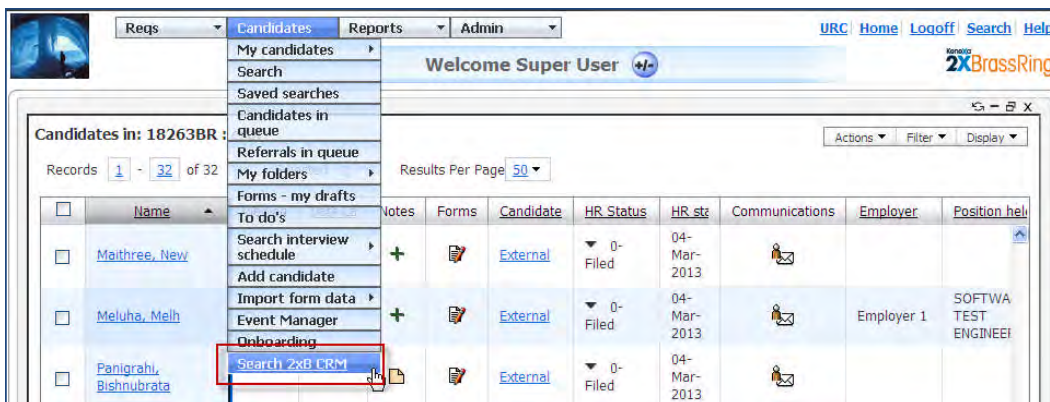
“2xB CRM record” replaces “2xB Social Source record.”



### Candidates Menu > Search in CRM

This menu item allows you to search candidates in the CRM from 2xB.

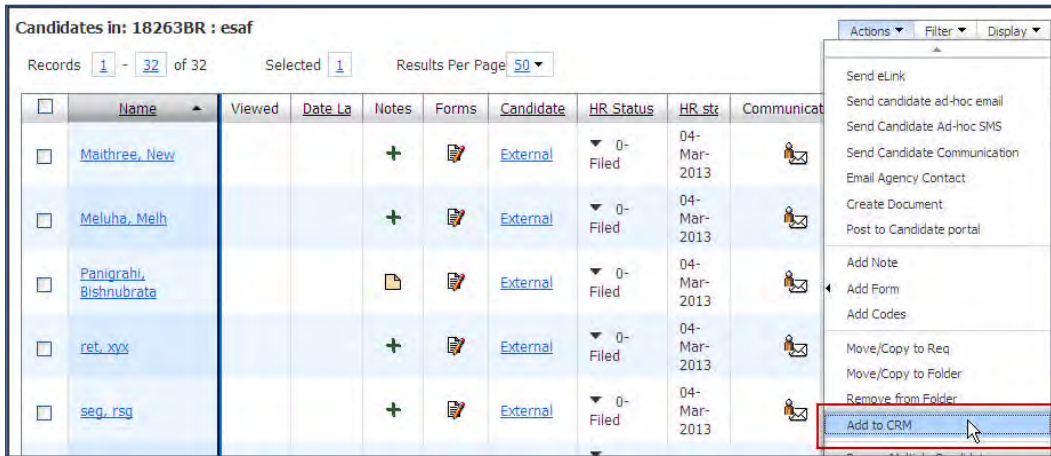
“Search 2xB CRM” replaces “Search 2xB Social Source.”



## Candidate Results > Add to CRM Action

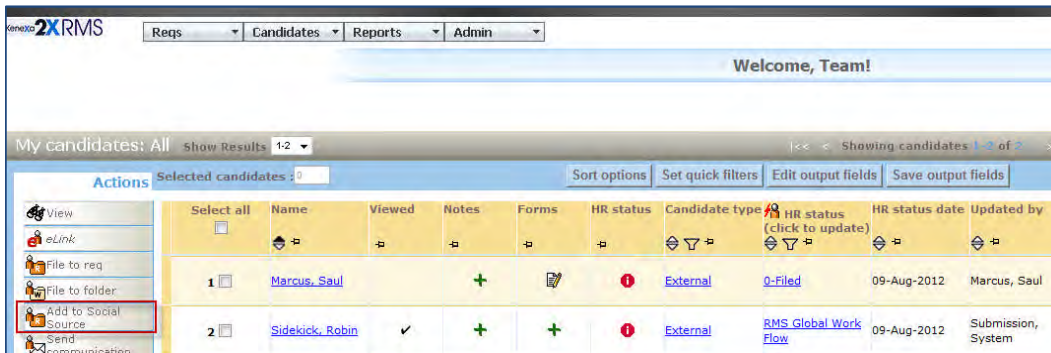
This menu items allow you to add 2xB candidates into the CRM.

“Add to CRM” replaces “Add to Social Source.”



## Classic My Candidates > Add to CRM

“Add to CRM” replaces “Add to Social Source.”



## Screens Affected in Workbench

The following areas are affected in Workbench.

### User Type Panel Mapping and Panel Configuration Settings – Self-Service

Maps the CRM Social Source Campaign or Avature Job Req panel onto the 2xB home screen if user has an integrated CRM.

“My CRM Campaigns or Job Reqs” replaces “My Social Source Campaigns” in following two screens:

**Tools > Users > User Types > User Type Panel Mapping**

User type panel mapping Audit Trail

<input type="checkbox"/>	All Reqs Pending Approval	Optional	--Select--	--Select--
<b>My Reqs/Candidates</b>				
<input checked="" type="checkbox"/>	Candidate Results	Default	STD:Advanced View	Right2
<input checked="" type="checkbox"/>	My Candidates	Default	STD:Advanced View	Left2
<input checked="" type="checkbox"/>	My Open Reqs	Optional	STD:Advanced View	--Select--
<input type="checkbox"/>	My Reqs Pending Approval	Optional	--Select--	--Select--
<b>Integration</b>				
<input checked="" type="checkbox"/>	My CRM Campaigns or Job Reqs	Default	--Select--	Left1

**Tools > Settings > Panel Configuration**

Tools Training Admin Privacy Policy Resource Center Logoff

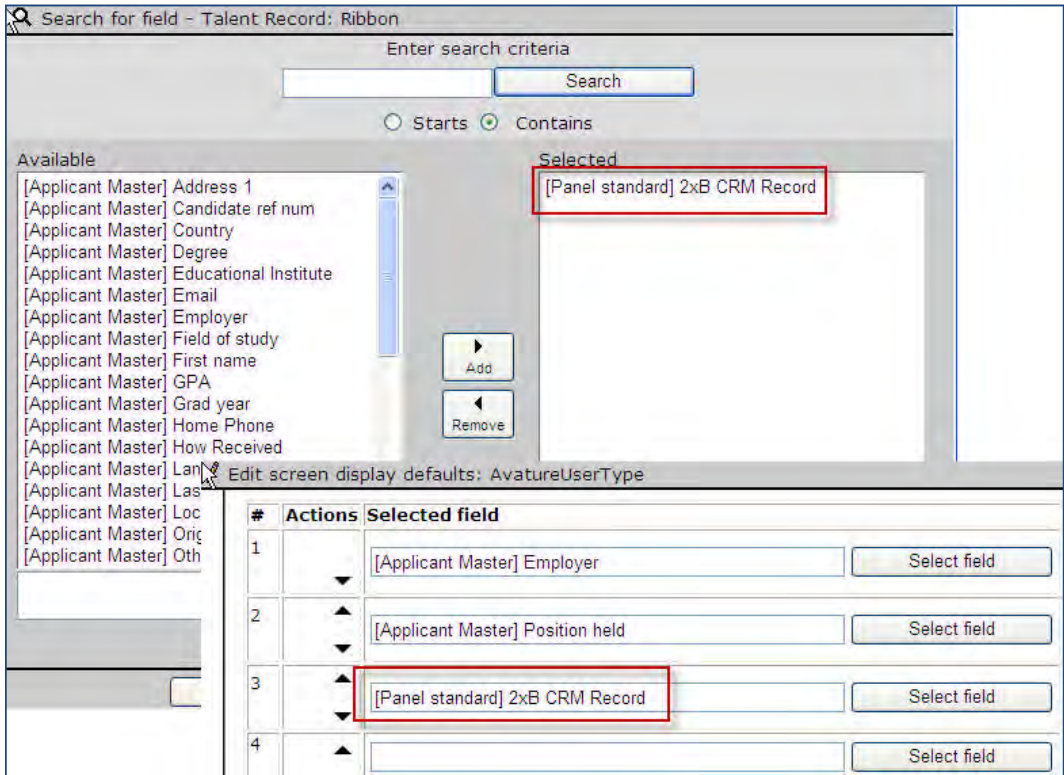
Actions ▶ **Panel configuration**

Panel name	View standard configuration	Administer configuration
<b>All Reqs</b>		
All Open Reqs		
All Reqs Pending Approval		
Welcome Message	N/A	
<b>Analytics</b>		
Metrics Panel 1	N/A	N/A
<b>Integration</b>		
My CRM Campaigns or Job Reqs	N/A	N/A

**Talent Record Ribbon Configuration – Self-Service**

**Tools > Users > User Types > Screen Display Defaults > [expand] Talent Record > Select field.**

“[Panel Standard] 2xB CRM Record” replaces “[Panel Standard] 2xB Social Source Record.”



### How Do Clients Get this Feature?

This feature is available automatically without configuration. Clients with client setting “Integration Candidate Relationship Management (CRM)” set to either CRM vendor automatically see the changes.

# Integrations – WOTC Automatic Data Processing (ADP)

Kenexa has partnered with Automatic Data Processing (ADP) to offer Work Opportunity Tax Credits (WOTC) services via a Web service integration with 2x BrassRing.

<b>Product</b> Rel 13.3 RDP 731 Addition Rel 13.2 LDP 133 Addition Rel 13.1 LDP 025 Update	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Integrations
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility..	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.	

## Feature Description

This standard integration service of Kenexa 2x BrassRing and ADP offers clients Work Opportunity Tax Credits (WOTC) services. WOTC is a US federal tax hiring incentive (applicable to US only), heavily used in the high-volume hourly hiring process. The per-hire credits can provide significant cost savings to companies.

The integration provides your organization with the means to obtain and submit required paperwork within federal time constraints and ensures candidates are asked the qualifying questions in order to receive the tax credits. When configured, WOTC questions can be displayed during the job application process from the Talent Gateway (TG) site or recruiters can send email communications using WOTC merge tokens inviting candidates to complete a WOTC eligibility screening as part of their continuing or new job application.

When a candidate completes the WOTC questionnaire, the WOTC results form that indicates a candidate's eligibility is accessible on the candidate's Talent Record. When a candidate is hired, ADP is notified. Forms that require the candidate's signature will be accessible via a report link on the WOTC Results form. Due to eSignature enhancements, the need for an actual signature will be rare. The signed forms go to ADP for tax credit processing.



Recent regulation changes now allow the WOTC 8850 form to accept eSignature, so clients are no longer required to print this form and have the candidate manually sign it. However, any forms associated with additional credits are available for printing/sharing from 2xB.

For candidates who need to complete the WOTC questionnaire post-apply, 2xB users can send an email communication containing an eLink to the WOTC questionnaire (hosted on a TG that has been configured for this).

WOTC Integration is available on Full Talent Gateways and Gateway Questionnaires.

## Suppressing Collection of Social Security Number and Date of Birth

An enhancement was made in Release 13.3 (RDP 731) allowing clients *not to* collect Social Security Number (SSN) and Date of Birth (DOB) information until a candidate is hired. Clients can suppress:

- SSN collection
- Date of Birth collection
- WOTC introductory page (entire page is hidden, its fields treated as not required)

Data collection is suppressed in both TG and Gateway Questionnaire (GQ) workflow. If your organization suppresses their collection, SSN and DOB data will not be available unless collected at a later stage. RAM templates have been updated so that SSN is available as a mapping option with the Hire Notification templates, and DOB collection will be addressed by your WOTC vendor.

## “Back” Enhancement for Candidates

Another release 13.3 enhancement is useful for candidates who use the Back button while completing the WOTC questionnaire. Previously they'd return to the previous TG section and lose the data they'd entered within the WOTC questionnaire. Now they can click back to move backward to a previous WOTC page without unintentionally leaving the questionnaire.

## Sub-Companies

Enhancements were made in Release 13.2 (LDP 133) for ADP WOTC clients with multiple “sub-companies” that each have separate WOTC accounts. Mapping changes for the Company ID and Password nodes (performed by Kenexa) provide a means of including unique data for the separate accounts, by having these two fields attached to the req.

## Candidates

Candidates will automatically be presented with the tax credits questionnaire when the following is true:

- Talent Gateway has WOTC enabled
- Requisition has WOTC set to “Yes” and WOTC has a valid location selected
- If using a Gateway Questionnaire, the WOTC widget must also be present

For Talent Gateways, WOTC question screens display after the Attachments page and before the Additional Questions page. For Gateway Questionnaires, WOTC question screens display wherever the widget has been placed (widget must be placed after profile data and address are collected because this information is required for WOTC).

“Tax Credits” breadcrumb displays on the progress bar when WOTC tax credit questionnaires are used.

## Candidate Experience

This section describes the candidate experience when a candidate has applied to a position that requires a WOTC eligibility check. This screen has configuration options using text customization.

In 2xB:

1. Candidate is prompted to initiate the WOTC questionnaire. The SSN page displays (unless suppressed). Candidate completes the questions that are present.





When SSN collection is suppressed, both of the SSN fields are hidden and treated as not required.

When DOB collection is suppressed, DOB field is hidden and treated as not required. When both are suppressed, all fields are hidden and treated as not required, and the client can also choose to suppress display of the entire page.

Even when DOB is suppressed on the BrassRing side, the candidate will be prompted to enter DOB, if under 40, by ADP as part of the WOTC questionnaire.

- Candidate clicks **Continue**. The WOTC questionnaire screen displays, auto-populated with applicable fields from the profile pages. Candidate supplies any missing information.

**Tax Credits Questionnaire**  
Please complete the following tax credits questionnaire.

\*Social Security Number

\*First Name

Middle Initial

\*Last Name

Email Address

Street Address

\*City

\*State


- Candidate clicks **Continue**. The Tax Credits Questionnaire permission screen displays.

**Tax Credits Questionnaire**  
Please complete the following tax credits questionnaire.

This company participates in the federal government's Work Opportunity Tax Credit, Welfare to Work, and other federal and state tax credit programs. The information you supply will be used by this company to complete its federal and state tax returns, and in no way will negatively impact any hiring decision. Your responses to the questions will be confidential to the employer's management and federal, state and local agencies.

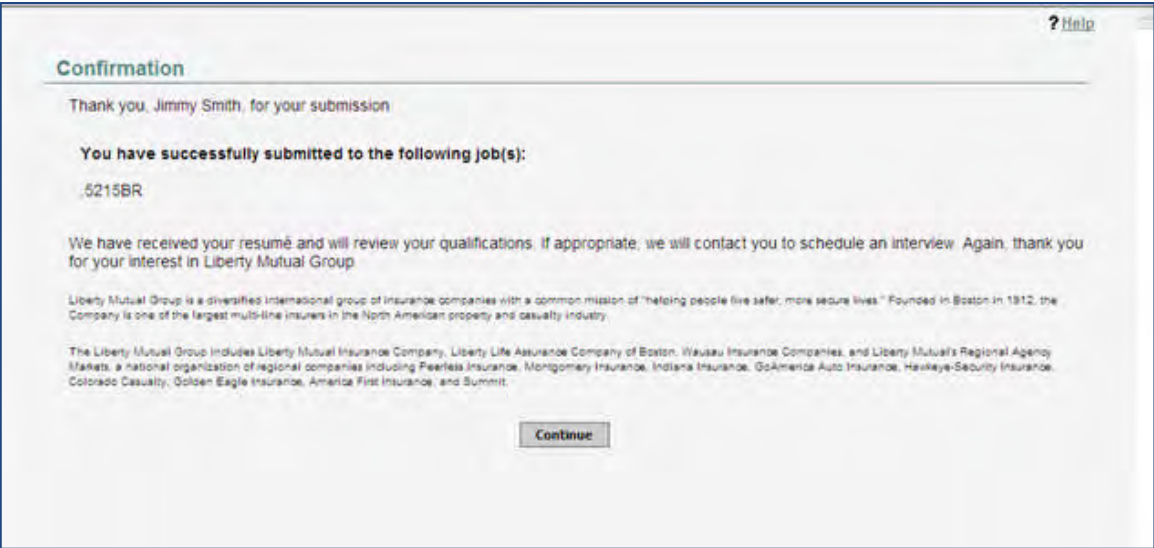
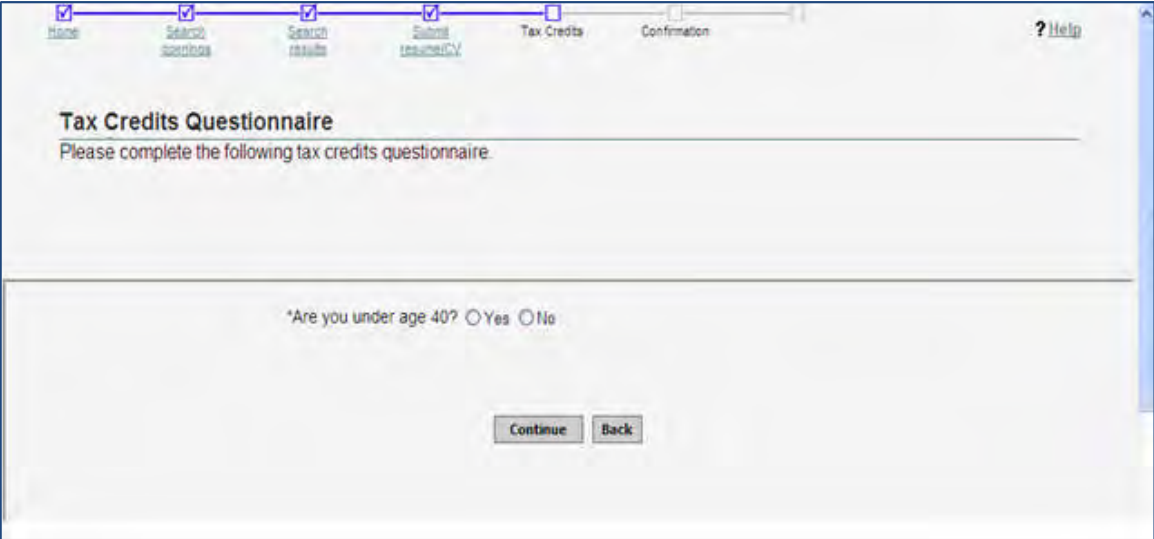
If you do not wish to participate in the Tax Credit Screening at this time, check this box.

Please answer all of the questions. This interview takes about 3 to 4 minutes to complete. Thank you!

 **Note:** ADP recommends allowing candidates to opt out of the WOTC questionnaire with the ability to resend/open the questionnaire for any candidates who opted out during the initial application process.

Candidate simply clicks **Continue** to accept the WOTC questionnaire process, or first selects the checkbox to refuse participation.

If electing to participate, the candidate is then asked a series of questions over several screens, and clicks **Continue** after completing each screen. The actual number and questions vary based on how candidate answers each question.



- 4. On completion of the questionnaire, candidates are returned to the TG/GQ to complete the application, or they receive a confirmation of their application. If candidates apply to more than one job simultaneously, they are presented with the WOTC questions only one time.

**After Completion of WOTC Questionnaire**

The WOTC Results form that indicates a candidate’s eligibility is added to the candidate’s Talent Record.



A Rules Automation Trigger (RAM) trigger then gets the candidate's eligibility. If a candidate is hired, ADP is notified via RAM trigger. ADP updates the WOTC results form with a "Click Here" link to the required WOTC tax forms. Clients obtain the candidate's signatures on the WOTC documents, and submit the signed documents to ADP for tax credit processing.



Clients can access and print the hard-copy documents to present to hired candidate for signature, but recent regulation changes now also allow the WOTC 8850 form to accept eSignature. Either way, any forms associated with additional credits will still be available for printing/sharing from 2x BrassRing.

## Notes

- When the candidate is going through a multiple job apply process where more than one job requires the WOTC questionnaire, the candidate will only go through one WOTC questionnaire. The same results will be copied to each of the requisitions applied to.
- If your organization has Save Draft enabled, the button will be hidden on the Tax Credits screen.
- If, due to configuration, the WOTC page is also the Submit page, the Submit button will be disabled until the WOTC questionnaire is complete to ensure the candidate does not inadvertently submit their application before completing the questionnaire.
- If the candidate has completed the WOTC questionnaire within the past 60 days, they will not be required to complete it again. Results already on file will be retrieved.

## 2xB User Experience

2xB users add the WOTC eligibility check to their requisitions by setting the WOTC custom field on the requisition to "Yes." Enabling this field launches the WOTC questionnaire when candidates apply. The location field is required.

Once a candidate applies, the configured WOTC candidate results form is attached to the Talent Record for any candidate who was presented with the tax credits screen. The form indicates whether the candidate is eligible or if they opted out of participating. You access the WOTC form from the Talent Record Forms tab/link.

Applicant ID	71400453	
Screen Date	15-Jul-2011	
Applicant Name	linc alexafour	
Tax Credits Eligible	Yes	
Opt Out	No	
WOTC Results	<a href="#">Click here</a>	
Date added	07-Jul-2011	Submission, System ()
Last action	15-Jul-2011	Submission, System ()

If 2xB administrators configure email templates using the WOTC merge tokens, 2xB users can use those email templates and WOTC merge tokens to send email communications to candidates to facilitate the WOTC application process.

## Best Practice Recommendations

When enabling the WOTC functionality on a requisition, it is recommended to select a value for the WOTC location field.

## Limitations and Known Issues

WOTC Tax Credit feature:

- cannot be used with jobless apply
- is only available on Full Talent Gateways
- is only available on US based English and Spanish gateways

## How Do Clients Get this Feature?

The WOTC feature is controlled by a client setting, and clients must have a direct relationship with ADP to use the WOTC service. Please contact your Kenexa Support Team for details on initiating a new relationship.

**Suppression of SSN/DOB Collection Enhancement RDP 731:** Clients can opt not to collect Social Security Number and Date of Birth information until a candidate is hired. This is achieved via [Talent Gateway text customization](#) options:

- Suppress SSN collection
- Suppress Date of Birth collection
- Suppress WOTC introductory page

If the new settings are checked, SSN and DOB data will not be available. The SSN data can be collected at a later stage, and RAM templates have been updated so that SSN is available as a mapping option with the Hire Notification templates. ADP collects DOB at time of screening.

**Sub-Company Enhancement LDP 133:** The sub-company enhancement requires mapping changes for the Web service. Clients must add two custom requisition fields (or can use standard fields if any of them are storing the appropriate data, such as CompanyID), as well as have mapping changes done by their Kenexa Support Team. Please contact your Kenexa Support Team for more information about enabling this.

## Workbench Self-Service Certified Users

Once configured during the setup process, the **WOTC Eligibility Check** custom req field must be added to req templates so it can be selected when appropriate reqs are created. Additionally, your client-specific custom requisition field that indicates the job's location in WOTC's required format must also be added to the req template.

1. **Tools > Forms > Reqs > Req forms > Administer req fields [for selected template] > Select custom req fields**
2. Select the **WOTC Eligibility Check** and custom WOTC Location fields.
3. Click **Save**.

## 2x BrassRing Admin/Admin+ Users

For candidates who need to complete the WOTC questionnaire post-apply, 2xB users can send an email communication containing an eLink to the WOTC questionnaire (hosted on a TG that has been configured for this). When the link is clicked, the candidate will be redirected to a Talent Gateway page that will host the questionnaire in an iFrame, where they can access and complete the WOTC questionnaire.

2xB Administrators can create the email templates using WOTC merge tokens. The merge tokens represent two types of eLinks:

- "WOTC questionnaire" merge field presents as a "Click here" link in the email.
- "WOTC questionnaire raw URL" will display as the full URL

2xB > Admin > Communications > Communications templates > Add/Edit communications template

–OR–

2xB > Admin > Communications > Add communications template

Add communications template - Windows Internet Explorer  
https://qaweb1.brassring.com/CMUI/AddEmailTemplate.aspx?OfficeSupport=yes#

**E-mail template**

E-mail subject line

Return e-mail address  (optional)

**MESSAGE BODY**

Top/Bottom margin  Left/Right margin

HTML Plain text

**Text Editing Area**

Font Name and Size: Arial 13  
Font style: B I U  
Lists:   
Indenting:   
Alignment:

Insert Item:

Colors:

SpellCheck:  English (US)

[#WOTC\_URL#]  
[#WOTC\_RawURL#]

**Merge fields**

WOTC fields  
WOTC questionnaire  
WOTC questionnaire raw URL

<< Add  
<< Add numeric field with formatting

**Link to job(s) on Gateway**  
Select a Gateway

<< Add  
Include forms to complete

# Kenexa Tasks

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Configuration includes:

- [Client setting](#)
- [TG Text customization](#)
- [Custom Req fields](#)
- [TG Admin setting](#)
- [Gateway Questionnaire Widget](#)
- [Candidate Form](#)
- [Maintenance Tickets](#)
- [RAM Triggers](#)

[Configuration for the sub-company enhancement](#) can be found at the end of the configuration steps.



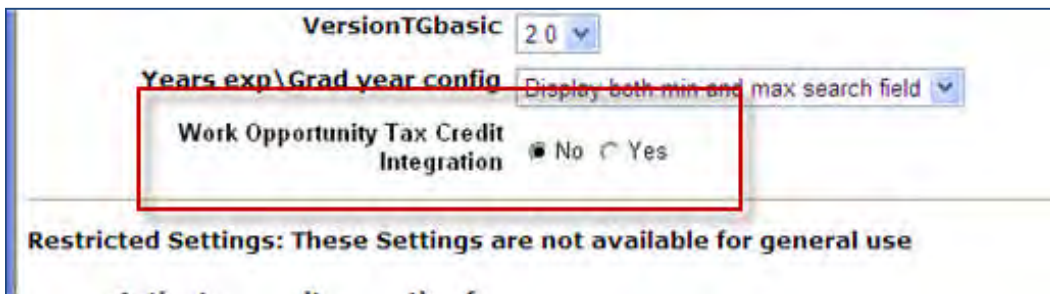
**Note:** Use Ctrl+Click to jump to each section. Use ALT+LEFT ARROW to return to your point of origin.

## Workbench

### Client Setting

Client setting is **Work Opportunity Tax Credit Integration**

**WB > Admin > Manage Clients > Edit client settings.**



When the client setting is set to **Yes**, req custom field “WOTC eligibility check” is automatically created. This field must be added to the req template and be search-enabled.

When the client setting is set to **Yes**, it cannot be disabled if there are:

- Any Talent Gateways with the “WOTC Integration” Admin setting enabled; or
- Any database fields are mapped for use with the WOTC integration.

### Talent Gateway Text Customization

Customize what is displayed when a candidate begins the WOTC process.

1. **Tools > Talent Gateways > Text customization [for selected TG] > WOTC tab.**

Customization for Hk-Test Audit Trail

Navigation: Saved drafts | Additional information | Notifications | Event Manager | Candidate portal | **WOTC** | Communications History | Privacy policy | Inactive time-d

### WOTC Questionnaire

**Page Title:**  [Show me](#)  
Reset to default

**Instruction Text:**  [Show me](#)  
Reset to default

Enable Opt Out  
 Display Exit Link  
 Default site for WOTC access for non-logged in profile with matching locale.  
 Suppress SSN collection  
 Suppress Date of Birth collection  
 Suppress WOTC introductory page

Buttons: Save | Reset to Saved | Cancel

2. Complete the Page Title and Instruction Text fields.



For the ADP integration, **DO NOT** check either the Enable Opt Out or Display Exit Link checkboxes.

3. (Optional) If applicable, check the **Default site for WOTC...** checkbox. Checking this box ensures the WOTC questionnaire is available to candidates who do not apply through a Talent Gateway but need to complete the WOTC questionnaire at a later date. Only one TG per language can have this enabled.
4. (Optional) Suppress the collection of Social Security Number (SSN) and/or Date of Birth (SSN) by checking the desired options:  
**Suppress SSN collection** – both of the SSN fields will be hidden and treated as not required  
**Suppress Date of Birth collection** – Date of Birth field will be hidden and treated as not required  
If suppressing collection of both, you can also check **Suppress WOTC introductory page** – entire page will be hidden and all fields treated as not required.



SSN and DOB data will not be available if the “Suppress...” settings are checked. RAM templates have been updated so that SSN is available as a mapping option with the Hire Notification templates used in the Hire Notification web service. When/if these questions are presented by ADP at that point in the process, they will not have pre-populated answers; the candidate will be required to fill in the data.

5. Click **Save**.

## Custom Req Fields

When the client setting “WOTC Integration” is first set to “Yes” a new custom Req field, “WOTC eligibility check” is automatically created. This field should be required, must be attached to the requisition, and must be search-enabled.

An additional client-specific custom requisition field is needed to indicate the job’s location. It must be in ADP’s required format, and must be search-enabled. **Best practice is to make this a required, single-select** field (multi-select fields won’t work with the WOTC templates in RAM). The ID is sent to ADP, so should match the list ADP is expecting for the client.



**Note:** ADP also requires an hourly rate custom Req text field value when hiring candidates.

Define necessary custom Req fields in **Tools > Forms > Reqs > Req Forms > Define Custom Req Fields**.

The screenshot shows a web browser window titled "Define new custom req field - Microsoft Internet Explorer". The page content is a form for defining a new custom requisition field. The form fields are as follows:

- Placement: 63 (dropdown)
- \*Database field name: WOTC (text input)
- Field name: WOTC Eligibility Check [English (US)] (text input)
- \*Type: Radio Button (dropdown)
- Custom report field: No (radio buttons, No is selected)
- Posting interface mapping: None (dropdown)
- Instruction type: None (dropdown)
- Font size: Medium (dropdown)
- Encrypted: No (radio buttons, No is selected)
- HR status restrictions: No (radio buttons, No is selected)

At the bottom of the form are three buttons: "Save and continue>>", "Clear", and "Cancel".

Values for **WOTC eligibility check** are:

- Database name = WOTC. Cannot be modified when the client setting “Work Opportunity Tax Credit Integration” is set to “Yes”.
- Field name = WOTC Eligibility Check.
- Type = radio button. Cannot be modified.
- Custom report field = No.
- Posting interface mapping = None.
- Instruction type = None.
- Font size = Medium.
- Encrypted = No. Cannot be modified.
- HR status restrictions = No.

## Search-Enabled

In order to make the fields search-enabled, complete the following fields in the Define Field Attribute dialog box after clicking **Save and continue** to display the **Define field attributes** screen:

Define field attributes - Windows Internet Explorer

Define field attributes [Audit Trail](#)

Field name WOTC

Field length 255

**Search / Output**

Searchable?  Yes  No

Outputtable?  Yes  No

Used (TEXT)	Available (TEXT)	Enable Search & Output
1	149	<input checked="" type="checkbox"/>

**Options source**

Maintain Custom List

Pull options from existing list [Select list](#)

**Field associations**

Enable association  Parent  Child

[Show children](#) [Show parent](#)

Display full list with default selection

[Save](#) [Revert to saved](#) [Cancel](#)

- Field name = WOTC
- Field length = 255
- **Searchable = Yes**
- **Outputtable = Yes** (When these are set to “Yes”, and the checkbox for “Enable Search & Output” is selected and Saved, the fields have been mapped to the search engine)
- **Enable Search & Output** – box is checked.
- Maintain Custom List is selected
- Options for Yes and No are automatically created. The list is not editable.
- Enable Field Associations – by default there is nothing configured, however, clients can set up associations for the field.

## Sub Companies

Some ADP clients with multiple sub-companies will have multiple ADP WOTC accounts. In this situation, two additional fields must be added to the requisition to store the CompanyID and Auth code (password), in order to route accordingly on the ADP side. These IDs/passwords must be provided by the client and/or ADP. For additional information, see [Sub-Company Enhancement Configuration \(LDP 133\)](#).

## Talent Gateway Setting

The **WOTC Integration** TG setting controls whether the TG presents the WOTC questionnaire when reqs with WOTC set to “Yes” are posted to it.

**Tools > Talent Gateways > Add/Edit [selected TG] > WOTC Integration** (in Special configurations section)


Launch assessment(s) via new window (used when TG is hosted within iFrame on client site)  
 Auto-launch assessments (only with assessment batches)  
 Default "Preferred Candidate Score" with max GQ score (excludes JSQ)  
 WOTC Integration

Save Revert To Saved Cancel

In order for the questionnaire to launch:

- WOTC integration setting must be checked
- WOTC field on the req must be set to Yes
- WOTC location field must be populated

When these criteria are met, the candidate will be presented with the WOTC questionnaire. In a non-GQ flow, the questionnaire launches after the Attachments page, before the Questions page and matches the look and feel of the Talent Gateway.



If the Tax Credits is the last step before Submit, the page button label is **Continue** rather than **Submit**.

**Business Rules**

- The option is disabled if the client setting "WOTC Integration" is set to "No."
- Tax credits will not work with jobless apply.

**Gateway Questionnaire Widget**

The **WOTC eligibility check** complex widget indicates where in the application process the candidate will be presented with the WOTC questionnaire.

**Tools > Gateway Questionnaires > Administer section/pages [for selected GQ] > Administer Widgets [for selected page] > Add new widget > Complex Widgets > WOTC eligibility check**

Widget properties - Microsoft Internet Explorer provided by Kenexa Technology, Inc.

Widget properties

Question Text Graphic **Complex Widgets**

Resume upload (includes resume cut & post)  
 Resume cut & post  
 Cover letter  
 Attachments  
 Education builder  
 Experience builder  
 Job specific questions  
 Job specific questions - results details  
 WOTC eligibility check

Optional  Required

**Business Rules**

- The widget must be on its own page.
- The widget requires the following profile fields precede it: firstname, lastname, address, city, state, zip (this information is needed to initiate the WOTC questionnaire, recommendation is to make the fields required).
- The TG setting must be checked and the WOTC req field must be set to Yes in order for the questionnaire to launch.
- The WOTC location field must be populated.
- When the widget is selected, the "Required" attribute will automatically be selected.



## Candidate Form

A new candidate form, WOTC Results, is created to store a candidate's WOTC eligibility results when the client setting WOTC Integration is enabled. Form privileges need to be configured for each client in:

**Tools > Forms > Candidate Forms > Edit form attributes [WOTC Results form]**

The screenshot shows the 'Add new form' configuration window for the 'WOTC Results' form. The window is titled 'Add new form' and contains the following fields and options:

- \*Database title:** WOTC
- Title:** WOTC Results [English (US)]
- Disclaimer:** [English (US)]
- Search:** A dropdown menu with options: HR Staff, Super User, Hiring Manager, Hiring Manager I, Background Check.
- Output:** A dropdown menu with options: HR Staff, Super User, Hiring Manager, Hiring Manager I, Background Check.
- E-mail:** [Empty field] Separate multiple addresses with commas.
- \*Approval process:** Radio buttons for No (selected), Parallel, Sequential, Rules-based. A URL field is next to it.
- Cascade approver messages:**
- \*Form multiples:** Radio buttons for One per candidate, Multiple per candidate, Single per candidate/req combination (selected), Multiple per candidate/req combination.
- Send existing form in edit mode:** Radio buttons for Yes, No (selected).

## Candidate Form Fields

These fields are **NOT** applicable for the ADP Integration and should be hidden for all user types:

- WOTC\_FED\_CR
- WOTC\_ST\_CR
- LAST\_EDITED\_BY

**Tools > Forms > Candidate forms > Administer form fields [WOTC Results form]**

**Administer form fields: [WOTC]**

View: [ [Active](#) | [Inactive](#) ] [ [All](#) | [Search](#) ]

Showing 9 fields

Select	Order	Database field name	Display name	Priv
<input type="radio"/>	1	WOTC_APPID	Applicant ID	
<input type="radio"/>	2	WOTC_SCRNDATE	Screen Date	
<input type="radio"/>	3	APP_NAME	Applicant	
<input type="radio"/>	4	WOTC_FED_CR	Federal Credits	
<input type="radio"/>	5	WOTC_ST_CR	State Credits	
<input type="radio"/>	6	WOTC_OPTOUT	Opt Out	
<input type="radio"/>	7	WOTCResults1	WOTCResults 1	
<input type="radio"/>	8	WOTC_Eligible	Tax Credits Eligible	
<input type="radio"/>	9	LAST_EDITED_BY	Last Edited By	

**Hide for all user types**

Configure remaining field privileges as desired by the client:

- “Tax Credits Eligible” will display Yes or No
- “Opt Out” will display Yes or No
- “WOTC Results” will display a clickable link if an eligible candidate is hired

### Confirmation Number for ADP (Optional)

Clients with ADP can enable an optional confirmation number (confnumbe) that gets returned with the Hire response call (shown below). If a client would like this then a custom form field must be added to the form to capture this information.

The common service consumes this field and sends it back to RAM with the existing results set. The new common service node name is: <confnumber> under the <response> node. The node is populated when a number is returned by ADP, otherwise it is blank (this is an optional configuration on the ADP side, so likely it will be blank for many clients).

```
<?xml version="1.0" encoding="ISO-8859-1" ?>
```

```
<hired forms="print_forms?excid=&interaction=0627500000521&icode=ZrdCcNiifhbfunda&formlist=30,31,12&a
uthi=dgjnAjaBPOabDYRp" confnumber="034F80780Y">
```

```
<credits>
```

```
<credit id="WOTC" form="print_forms?excid=&interaction=0627500000521&icod
e=ZrdCcNiifhbfunda&formlist=30,31,12">Work Opportunity Tax Credit</credit>
```

```
</credits>
```

```
</hired>
```

### Maintenance Tickets

A maintenance ticket must be created for this integration.

To create the maintenance ticket:

1. Create a project ticket.
2. Create a Work ticket from the project ticket and assign it to: Queue – Engineering, Type – Maintenance.

3. Ensure the ticket contains the following:

- Client Name
- Staging or Production
- WOTC Vendor Name (ADP)
- WOTC Company ID (must get this from ADP)
- Database and label names of requisition fields that will be used for WOTC **Location** and for **Hourly Rate**, as well as name of req template(s) that will require WOTC
- Password for client to access vendor's system (must get this from ADP).  
Some ADP clients may have multiple CompanyIDs/Passwords, usually due to having sub-companies. If this is true then the CompanyID/Password must be stored as custom req fields. Include the database and label names of each field and which req template(s) will be used for WOTC.

## RAM Triggers

Two RAM triggers must be created, one to obtain eligibility results and one to obtain a client's Hired status.

### WOTC Eligibility:

A RAM trigger must be created to get the candidate's WOTC eligibility. This is initiated within a few minutes of a candidate's submittal.

1. Create a RAM trigger with a Triggering Mechanism = "Candidate Form Insert or Update." The trigger is based on the "WOTC Results" form and should be named to reflect its use for WOTC Eligibility Check.

The screenshot shows the 'Rules Automation Manager' interface. The 'Trigger Name' is 'WOTC Eligibility'. The 'Triggering Mechanism' is 'Candidate Form Insert or Update'. The 'Select Trigger Event' is 'Selected (T)'. The 'Trigger Delay (hrs)' is '0'. The 'Trigger Context' is 'None'. Below this, the 'Candidate Form' is 'WOTC'. There is an 'Add Rule' button. Under 'Defined Rules (in sequence)', there are two rules: 'Eligibility Check' and 'Req Template 2'. Each rule has 'Edit' and 'Delete' buttons.

2. Within the trigger, create one rule for each Req template containing the WOTC field.

The screenshot shows the 'RAM Add/Edit Rule' interface. At the top, it displays 'Req Edit' for 'ReqForm00' and 'Rule Name: 1'. The 'Action' tab is active, showing 'Preconfigured Integration' as the action type and 'WOTC - Check Eligibility - ADP' as the action category. A 'Map Template Fields' dialog is open, showing input and output field mappings. The input fields are Company Id, Password, Applicant Id, and Location. The output field is WOTC Eligible. Buttons for 'Save Action' and 'Cancel/Clear' are visible at the bottom.

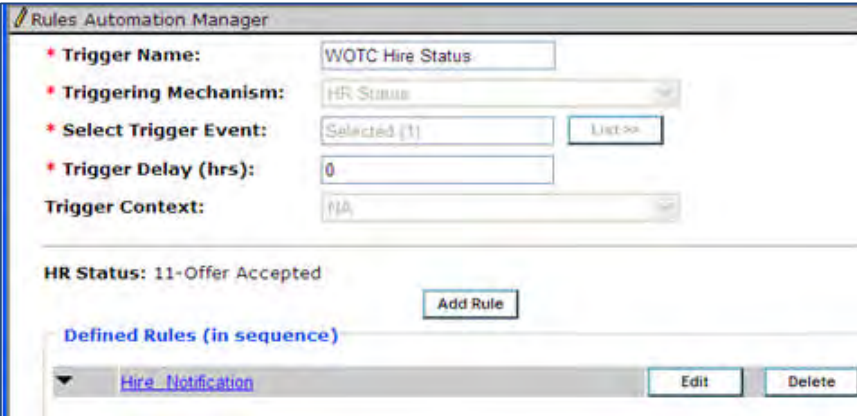
- Rule Name: When naming the rule, if multiple Req templates are affected, it may help to include the template name
- Conditions: check for Req template with WOTC enabled and for WOTC form field “WOTC Eligible” = blank
- Action Types
  - “Preconfigured Integration”: Category = “WOTC – Check Eligibility – ADP”
    - Map Template Fields as required. If client is storing Company ID and Password on the Req (when multiple sub-companies exist) then map these fields, otherwise, they can be skipped
      - ApplicantID is always the WOTC candidate form “WOTC\_APPID” field
      - Location = Req field used for WOTC location
      - WOTC Eligible is always the WOTC candidate form “WOTC\_Eligible” field

Removing “Populate Field Values” update WOTC form field “LAST\_EDITED\_BY” to “Manager, Automation”

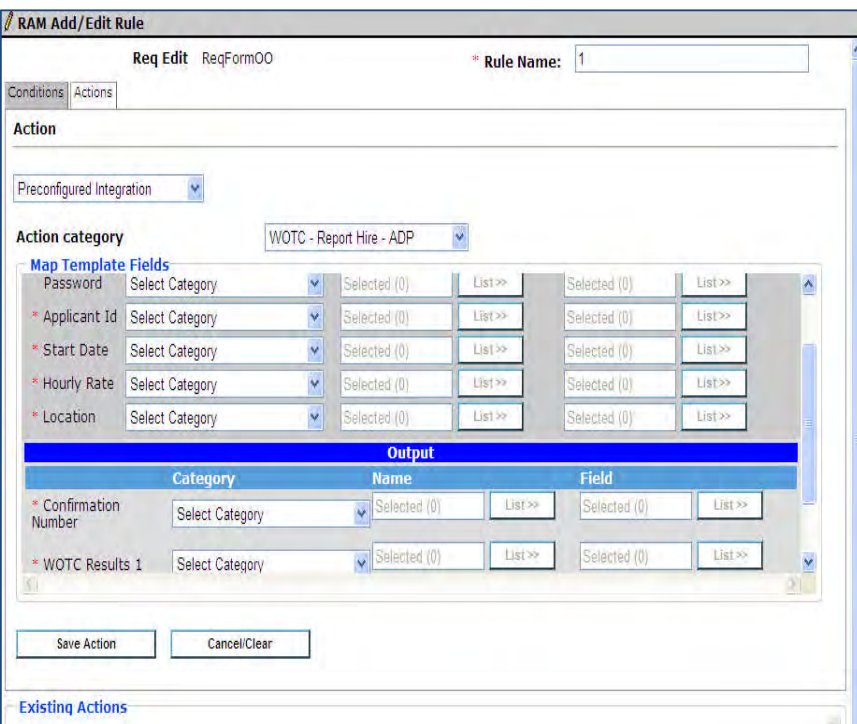
## Hired Status

An additional RAM trigger must be created to notify ADP of the applicant's hire status and to receive back the required tax eligibility forms.

1. Create a RAM trigger with a Triggering Mechanism = “HR Status.” The trigger should be based on the client's Hired status.



2. Within the trigger, create one rule for each Req template containing the WOTC field.



- Rule Name: "HIRE NOTIFICATION" (or similar). If multiple Req templates are affected, it may help to include the template name
- Conditions: check for Req template with WOTC enabled
- Action Types:
  - "Preconfigured Integration" Category = "WOTC – Report Hire – ADP"
    - Map Template Fields as required. If client is storing Company ID and Password on the Req (when multiple sub-companies exist) then map these fields, otherwise, they can be skipped.
      - Applicant ID is always "WOTC" candidate form "WOTC\_APPID" field
      - SSN (not shown) may be required by ADP, if so, this must map to candidate form field which stores SSN
      - Confirmation Number is optional and will be added to the WOTC candidate form if desired

- WOTC Results 1 is always the “WOTC” candidate form “WOTCResults1” field.

### Trigger Migration

Clients already configured with WOTC RAM triggers will need to migrate to the WOTC templates, with assistance from Product Management and Engineering. The following is an overview of the steps that will be required. Please submit a maintenance ticket requesting assistance with WOTC trigger migration and assign to Queue Engineering, to initiate the process:

- Create a new version with the same trigger. Configure a new preconfigured WOTC action. Delete the existing Send Data action.
- Activate RAM trigger.
- Test with a new req – since versioning is used
- Once testing has passed, use the WB link to delete all previous versions

### Sub-Company Enhancement Configuration (LDP 133)

The Kenexa Support Team must submit a maintenance ticket for mapping changes, but there are no Workbench configuration changes. (The mapping process should eventually be available through RAM.)

Currently you can submit a maintenance ticket to map requisition fields to the <companyid> and <password> data elements so that requisition-specific data can be used, rather than just client level.

The vendor equivalent fields are:

<b>Common Service</b>	<b>ADP</b>
companyid	company
password	auth

### Business Rules:

With this enhancement, TG behavior will change in the following regard:

- When requisition-specific fields have been mapped for use as “companyid” and “password”, the req-specific data is used rather than client-level.
- The standard process of sending a single call to the common service for a multiple-job apply scenario changes for both req-specific and client-level cases. Rather than sending a single call to the common service and then reusing results for each of the applicable requisitions, an individual call is made for each of the selected requisitions, and req-specific results are used for the corresponding reqs. This applies only to ADP.
- Regardless of the number of requisitions for which the candidate is applying simultaneously, candidates are only required to enter SSN and DOB on the Kenexa WOTC page a single time. This data is held and reused for each subsequent call, so the candidate does not see the Kenexa WOTC page again (instead of having the page display with pre-populated data).
- If either companyid or password fields are blank, the request call cannot be made. The behavior in that case matches that of WOTC Location missing.

### Note on Integration Security

The 2x BrassRing WOTC integration with ADP has been developed in accordance with ADP’s standard specifications; 2xB adheres to those standards. Different levels of security are in place to ensure safety of the data being exchanged between the two systems:

- Data exchange between ADP/2xB uses https/SSL, which encrypts data during transport.
- The integration is always initiated by 2xB. For each of the calls available, ADP requires an AccountID and Password in order to authenticate the request from 2xB.

# RapidHire – High-Volume Hiring Enhancements

Several enhancements have been made to RapidHire that allow your organization and appropriately privileged users to:

- [Add and edit forms](#)
- [Print candidate profile data and forms](#) individually
- [Configure default Landing page](#) by user type
- [Display ReqID](#) (on Positions page), configurable by user type
- [Configure column heads](#)
- [Display candidate's attachments](#), configurable by user type
- [Select multiple candidates](#) for HR Status update, add form
- [Print multiple candidates](#) from lists in a group
- [Print list](#) from Interviews or Starting list (prints on-screen data only)
- [Alert that candidate is in selected HR Statuses for additional reqs](#), configurable by user type
- [Perform password retrieval on-screen](#)
- Previous/Next processing on Candidate Details that respects list screen filtering
- "Open PDF" button on the Resume and Cover Letter page (to open a pdf when available)

For your convenience, information on the enhancements has been incorporated into the feature description provided with RapidHire's introduction in Release 13.2.

<b>Product</b> <b>LDP113 Release 13.3</b>	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> RapidHire
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.	

## Feature Description

RapidHire is a 2x BrassRing module and mobile user interface designed specifically for hiring managers in high-volume industries like retail and hospitality. Rapid Hire is 2x BrassRing delivered on a tablet, and it streamlines the recruitment process for hourly hiring with the right set of tools hiring managers need to recruit and hire the best talent. Because it's optimized to be used on a tablet, even during busy work hours Rapid Hire allows managers to:

- Quickly see their open positions on the dashboard, with visual cues for new and important information
- Filter for candidates by shift, work experience and other configured filters
- View a streamlined and configurable version of the candidate Talent Record
- Change HR status of candidates and perform associated action (e.g., add related form)
- Schedule themselves for interviews and view candidate interview details.

RapidHire, optimized for iPad, also supports PC, Android™ and iOS tablets using IE 8 or above, Firefox (latest version) or Chrome (latest version).

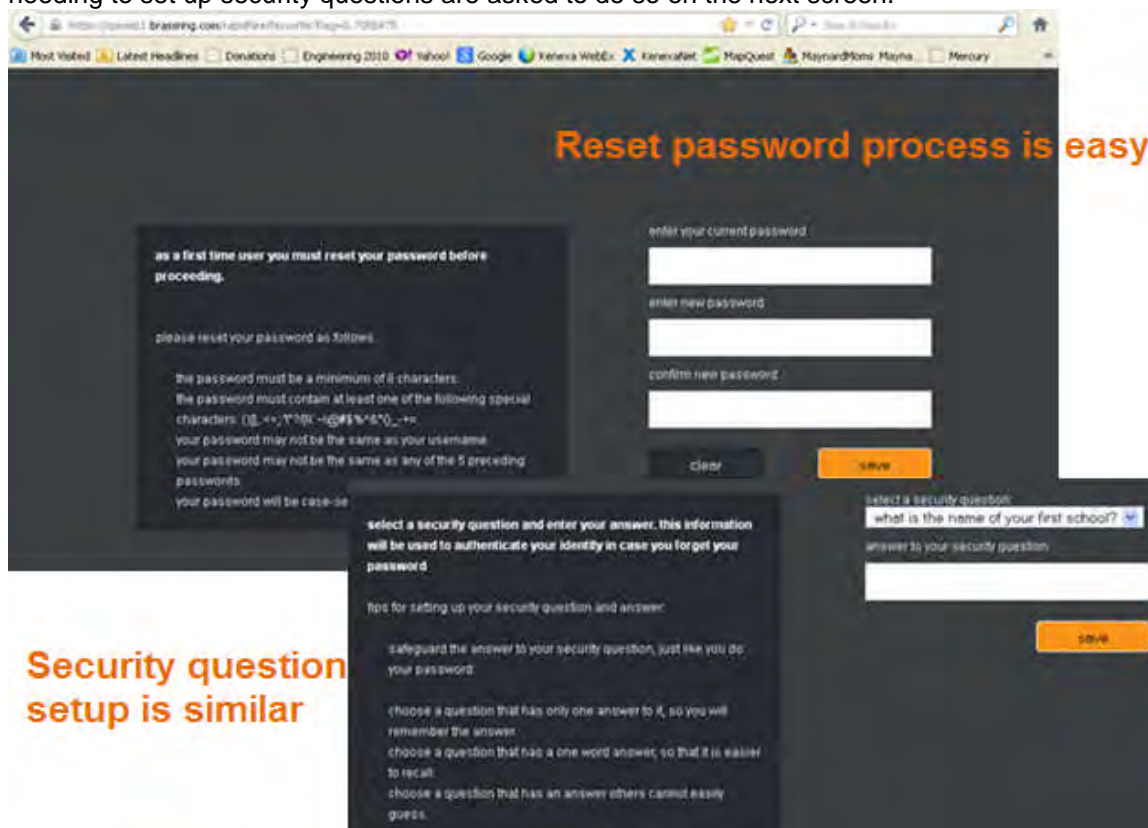
## RapidHire Login

Logging in is a simple and familiar process. Sign in to RapidHire via browser, entering user name and password.



The image shows the RapidHire login interface. On the left is the RapidHire logo, which consists of a stylized orange flame icon followed by the text "rapidhire" in a bold, sans-serif font, with "by Kenexa" in a smaller font below it. To the right of the logo are two white input fields: the top one is labeled "username" and the bottom one is labeled "password". Below the password field is a link that says "forgot your password?". At the bottom right of the form is an orange arrow-shaped button with the text "sign in" inside.

- First time users reset their password. For clients with “Activate Security Questions for 2xB” set to Yes, users needing to set up security questions are asked to do so on the next screen.



The image displays two overlapping screenshots from a web browser. The top screenshot is titled "Reset password process is easy" in orange text. It shows a form with three input fields: "enter your current password", "enter new password", and "confirm new password". There are "clear" and "save" buttons at the bottom. To the left of the form is a text box with instructions: "as a first time user you must reset your password before proceeding." and "please reset your password as follows: the password must be a minimum of 8 characters. The password must contain at least one of the following special characters: [!@#\$%^&\*~\_+]. your password may not be the same as your username. your password may not be the same as any of the 5 preceding passwords. your password will be case-sensitive." The bottom screenshot is titled "Security question setup is similar" in orange text. It shows a form with a dropdown menu for "select a security question" (with "what is the name of your first school?" selected) and an input field for "answer to your security question". There is a "save" button at the bottom. To the left of the form is a text box with instructions: "select a security question and enter your answer. this information will be used to authenticate your identity in case you forget your password." and "tips for setting up your security question and answer: safeguard the answer to your security question, just like you do your password. choose a question that has only one answer to it, so you will remember the answer. choose a question that has a one word answer so that it is easier to recall. choose a question that has an answer others cannot easily guess."

## Login Security and Forgot Password

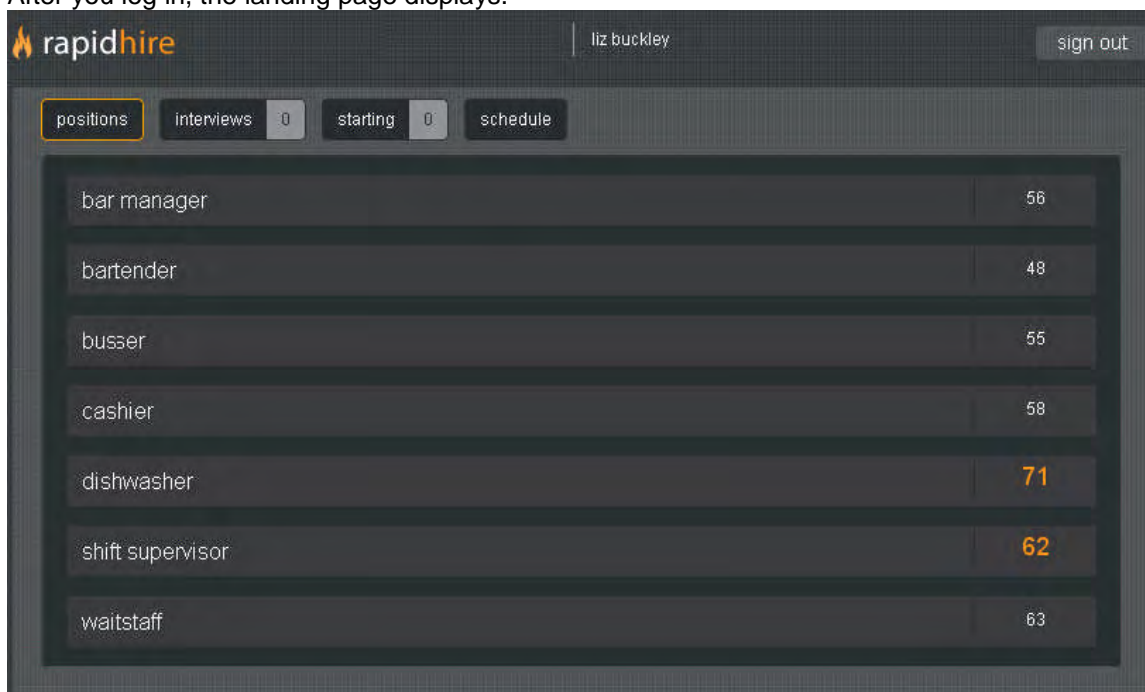
“Forgot password” functionality is presented as necessary. If the username is found, a password reset is sent to the secured email address of the user’s profile, or, for clients who enable on-screen reset, can be done on-screen for user types with the “**On-screen forgot password reset (suppress e-mail)**” setting checked. In this case, if the user enters correct username and has a security question already configured, user is immediately presented with the security question on-screen.



- For users who do not yet have a security question configured, password recovery is carried out via email regardless of the “on-screen” setting.
- Users who provide incorrect answer to security question are prompted again with the question. They have three attempts to answer the security question. If they fail all three attempts, their account will be locked. They are able to make additional attempts, but since the account is locked they will receive the message described in the preceding “Limitation” regardless of the answer entered (even if it happens to be correct). Lockout time will match that configured in your organization’s 2xB client setting “Lockout Period 2xB”. A user providing correct security answer (when account is not locked) is presented with the RapidHire ‘enter new password’ screen. Once new password is created they will be brought to the login page.
- If a user with “**On-screen forgot password reset (suppress e-mail)**” set *enters an incorrect username*, the standard message notifying them that they’ve been sent an email will display, “You have asked to recover your password. For your protection, this operation is carried out through a secured e-mail, which has been sent to the address associated with your user profile. Please click on the link in the e-mail to reset your password. Check your e-mail for a message called “Password recovery.” However, *no email will actually be sent*.
- Standard password expiry is available for clients setting password expiration periods.
- Another configurable standard security measure, “Restrict Address by IP Address,” sends an error message to users attempting to access the URL from an unapproved IP site.

## Landing Page

After you log in, the landing page displays.



It includes a configurable Manager ribbon with buttons to get you started performing your most common hiring tasks. There’s also Sign-out button at top right.

## Default Landing Page

Your organization can set a different screen than **Positions** as the default landing page, per user type. The display of the **Positions** button is now optional, so if you send a user type to a different page on login, you don’t have to provide access to the Positions button or screen.

## Manager Ribbon and Navigation

The landing page ribbon has actionable buttons based on what your user type is configured to view. The button **outlined in orange** shows where you currently are. (The color is used throughout the interface to emphasize especially important information.) Buttons you see may include the following. Default view button is outlined.

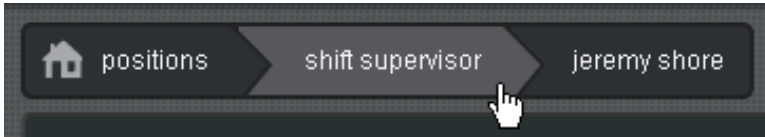
- **Positions** – View candidates for your open positions  
Lists the manager’s open positions, so Positions button is outlined.  
Requires user type privilege “MyReqs” – “My Reqs – view open.”
- **Interviews** – View info on who’s coming in for an interview
- **Starting** – View info on who’s starting a new job  
The Interviews and Starting candidate status buttons show a count of candidates with interviews scheduled or a count of new hires who are starting within the next seven days (highlighted count indicates one or more matches for today). You can also view last 7 days or next 30 days.  
Both numbers exclude candidates in an HR status the user does not have privilege to view. For Starting, user must have form privilege for “Add/view/modify my,” “View my reqs,” or “View all,” and form field must not be Hidden for this user type/current language.
- **Schedule** – Check your interview calendar and update existing interviews (if you have appropriate privileges).

Click a button to refresh the screen with related details and available actions.

On the candidate list for Positions and on the Interviews and Starting pages, you can click anywhere on the candidate row and be redirected to the candidate details page.

## Bread Crumbs

Bread crumbs appear at the top of the display as you navigate through RapidHire, showing your path to the current display.



Click within the breadcrumb path to return to the previous displays or Home. Prior selections (such as filters) persist when you return.

## Positions

Positions screen lists your open positions, with the count of candidates for each (up to 75 of the most-recent positions/reqs for which you have access, those with a “My Req” relationship). Count is highlighted if it includes **new unviewed candidates**. (Count is the total count of candidates in an HR status that you can view, and with whom you have a My Candidate relationship.)

Bar Manager	56	Bartender	48
Buser	55	Cashier	58
Dishwasher	71	Shift Supervisor	63
Waitstaff	63		

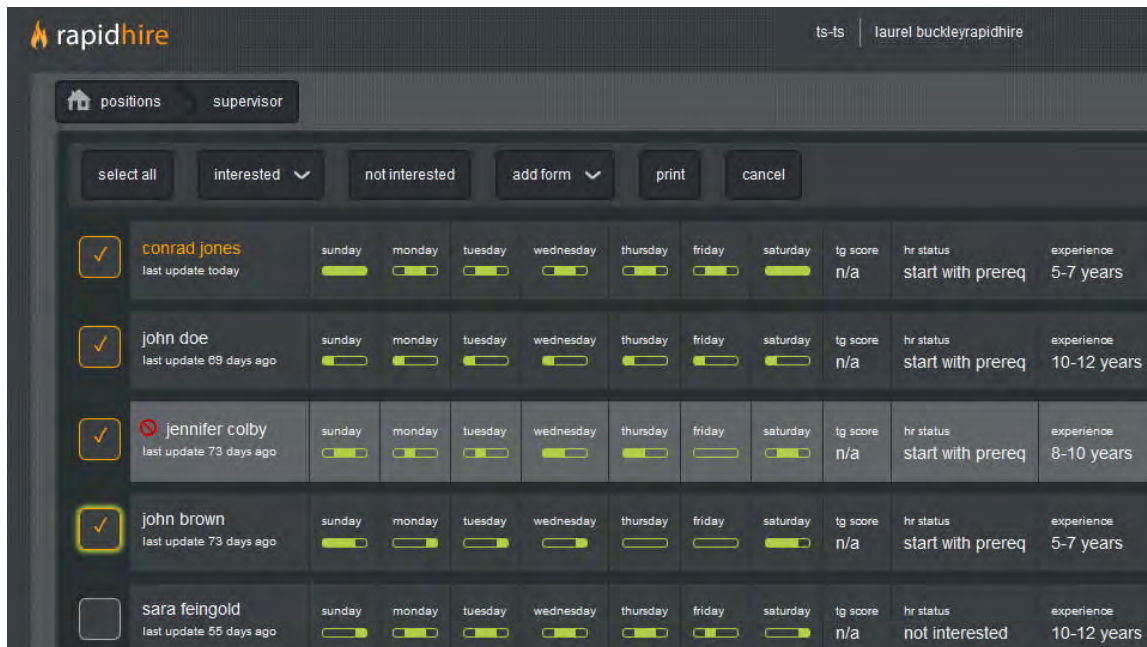
## Display of ReqID

If displaying Positions for the user type, your organization can also display the req ID, in parentheses.

## View Candidate List for Position

To look at candidates for a position, click anywhere on the bar displaying its title. The list of candidates for that position displays, with unviewed candidates highlighted in orange. If enabled, Candidate tiering is respected.

Multiple-candidate actions are now supported: HR status updates, adding forms, and printing candidate data ([more](#) about this later). The tool bar toggles as soon as a single candidate is selected.



For each candidate you see:

- Candidate's name in a bar display that you can click to display that candidate's detailed information
- Last HR Status update (below the name)
- Up to ten custom output fields (may show more columns if a grid-field is included as each column of a grid will display)

Above the candidate listing are the configured filter options and search box, which also display based on RapidHire configuration. If one or more non-grid fields are available for filtering, you see a drop-down list. Select your filter and click off the area to run the filter on the candidates currently shown on the screen.

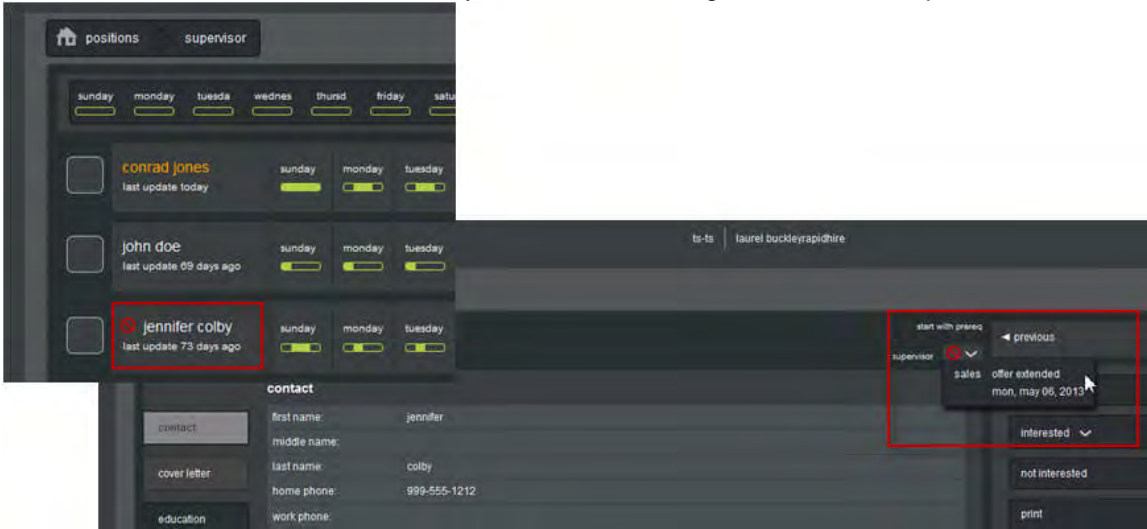
### Candidate list (Filter/sort candidates)



### Applied to Additional Req Indicator

A visual indicator can be enabled by user type to alert users when the candidates they are viewing are already in an advanced HR status in a separate position/requisition (excluding secure reqs). The HR Statuses that will trigger the alert are configurable. The indicator will appear on the candidate listing screen as well as on the candidate details screen.

This alert can also be configured to show details (job title, location/division, HR status, HR status update date), on the Candidate Details screen, for any candidates showing the additional reqs alert indicator.



## Custom Column Heads

Your organization can also create custom labels to display instead of the standard column headings on the Candidate Results screen, and for the “Availability” grid field on the Candidate Details screen.

hr status	experience	assessment name	assessment score	employer
start with prereq	5-7 years	healthcare industry terminology	proceed with caution	big box store
start with prereq	10-12 years	healthcare industry terminology	assessment score	employer
start with prereq	8-10 years	healthcare industry terminology	failed	large store

## Filtering

You can filter by shift or by profile information.

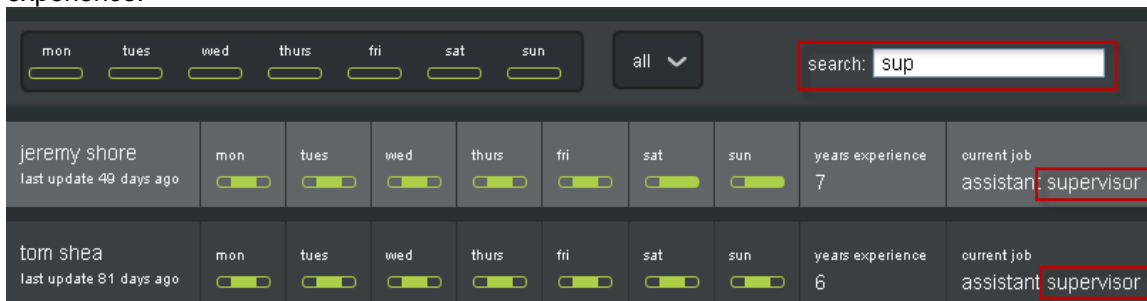
### Filter by Shift

To find candidates able to work certain shifts (if the “availability” grid-field is configured to display), click the grid-field filter and select the shifts in the pop-up that appears. Those able to work at least the selected shifts will be listed.



### Filter by Profile Information

To find candidates by information such as past employers, position title, education, or organization, begin typing desired criteria in the Search box. For example, begin entering “supervisor” to find someone with supervisory experience.



### Selecting Multiple Candidates

Based on user privileges for the Candidate Details screen, you can select multiple candidates for certain actions. After you select one or more candidates on the candidate listing page, the top of the page (section where filter/search is displayed) changes to display actions you can take for those selected. Actions can include:

- **HR Status Update**

To update multiple, candidates selected (up to 100) must all have the same HR Status. If at different HR Statuses, HR Status update is disabled. If pop-up forms are required, one instance of the form displays a message alerting you that the form is being completed for all selected candidates.

If updating to Hired HR Status, the system counts down the number of candidates hired and subtracts from positions available number. If number hired exceeds number available, the action is blocked, and the following message is presented: **“There are too many candidates selected for the final status. You may not select more candidates than there are positions remaining for this req.”**



Auto-close of reqs is not supported. RapidHire will display message: “Auto-close of requisition is not supported in RapidHire, please contact your system administrator to close this requisition.”

- **Print List**

Available on all candidate listing screens: **Interviews** and **Starting**. You can select some or all candidates to print a list of the candidate interview or starting candidate data presented on the screen (such as name, interview date, and so on)

- **Print Profiles** (maximum 100 candidates)

After selecting this action, which is available for candidates listed for Interviews, Starting, and Positions, the modal window displays all candidate details sections per your user type’s configuration. If a candidate does not have a value for one of the selected items, the item is skipped in printing (no error messaging).

- **Add Form**

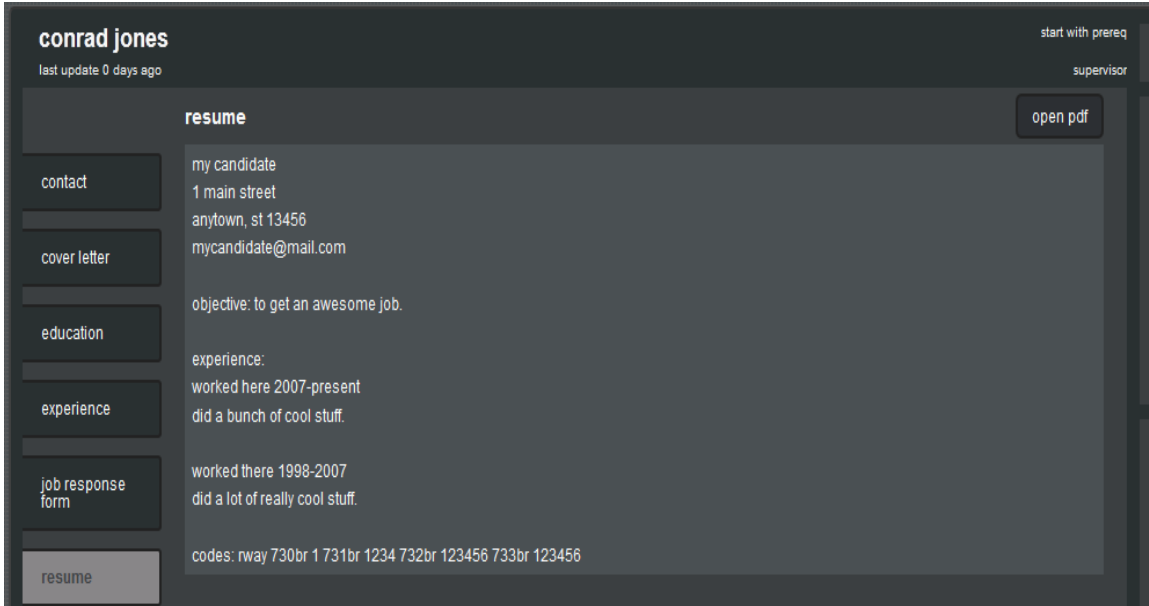
After clicking Add Form, you select the form to be added. A single per candidate or single per candidate per req form is added only to candidates who do not already have the form. A message displays to inform users: “Note: If multiple versions of this form are permitted per candidate, then you are completing the form below for all selected candidates. If only a single version of this form is permitted per candidate, then you are completing it for those selected who do not already have this form attached.

## View Candidate Details

To view a candidate’s detailed information – contact information, work history, education, availability – click anywhere in the name bar of a candidate listing (including listings for Position, Starting, or Interview displays). The individual’s position-specific details display.

You can view any of the configured Details sections (experience, education, resume, forms such as job response form, etc.) at left, or take any of the actions at right – action buttons for which user types don’t have privileges, such as HR status updates, can be hidden.

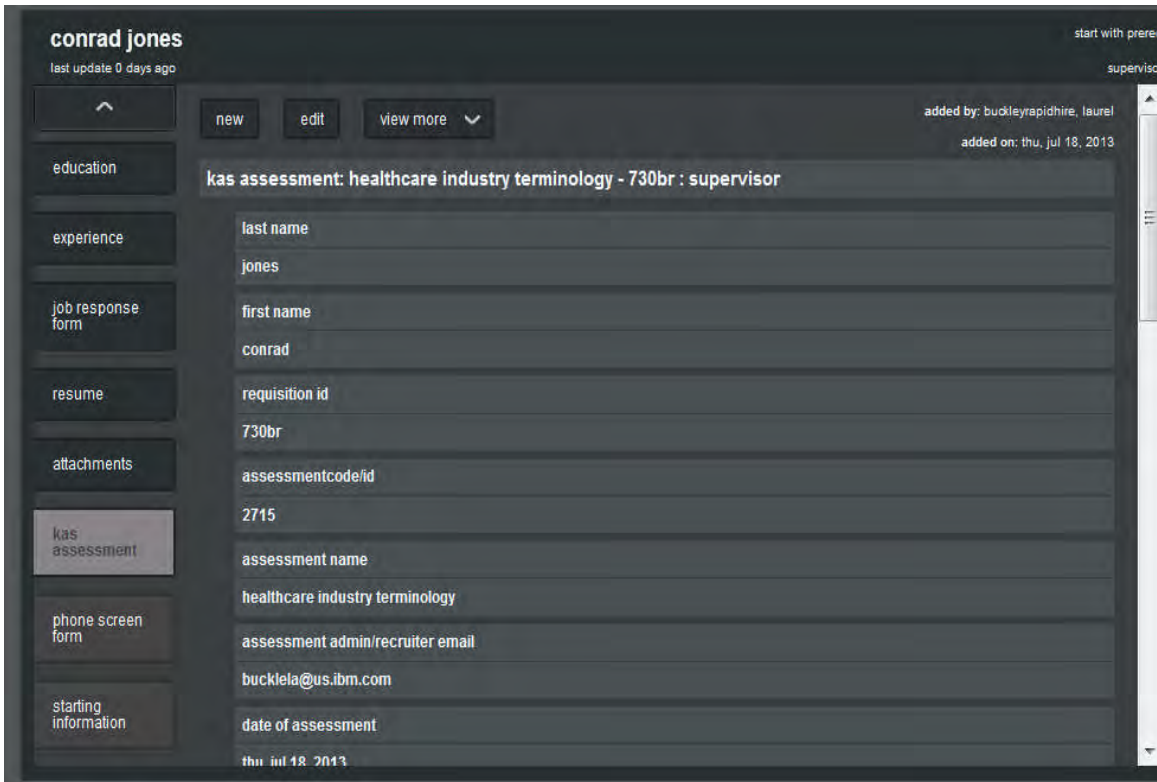
When viewing the resume display, an “**open pdf**” button displays on the Resume page if a pdf version is available. Click to open the pdf for viewing or printing.



You can move forward or back to details of other candidates that met the filter criterion, without having to go back to the candidate listing page to select the next candidate to view.

### Add/Edit Form

Users with appropriate candidate form privileges can now add and edit candidate forms and view additional versions in RapidHire, using the new **form** button on the candidate's details screen. The button has a dotted line when no forms exist.



- To view a form, click form. The most recent version displays on-screen. For multiple per candidate or multiple per candidate per req forms, you can create an additional form by clicking the **new** option on the form details. The **new** action is not available if user doesn't have privilege to add, or if form is single-per-candidate or single-per-candidate-per-req and an instance already exists.
- To access multiple per candidate or multiple per candidate/per req forms, select the form name and then click **view more** to select from the additional forms identified by Created by/Updated by and Date added/edited information on the drop-down. For KAS Assessment form, the assessment name is also included.
- To print forms: Select the form and click **print**. Forms names displayed are all the forms that exist for at least one of the selected candidates (and that user type has privileges to view). For multiple candidate print, RapidHire will print the most recent version associated with current position/req.
- To add a form, click form, then click **new**. The blank form presents in a new browser tab or window (depending on the browser).
- To edit a form (for users with Add/View/Modify My privilege where form was created by this user, or Modify All form privilege), select the **edit** option on the form details. (Edit option does not appear for users without appropriate privileges.)

eLink blank form

general information

\*date of phone interview

\*person completing phone interview

please complete the following basic questions for all candidates. q&a for position specific questions should be included in the text area in the last section of this form.

what location(s) will the candidate relocate to?

\*current base salary

\*current bonus amount

\*other compensation (car allowance, etc.)

\*candidate's target compensation

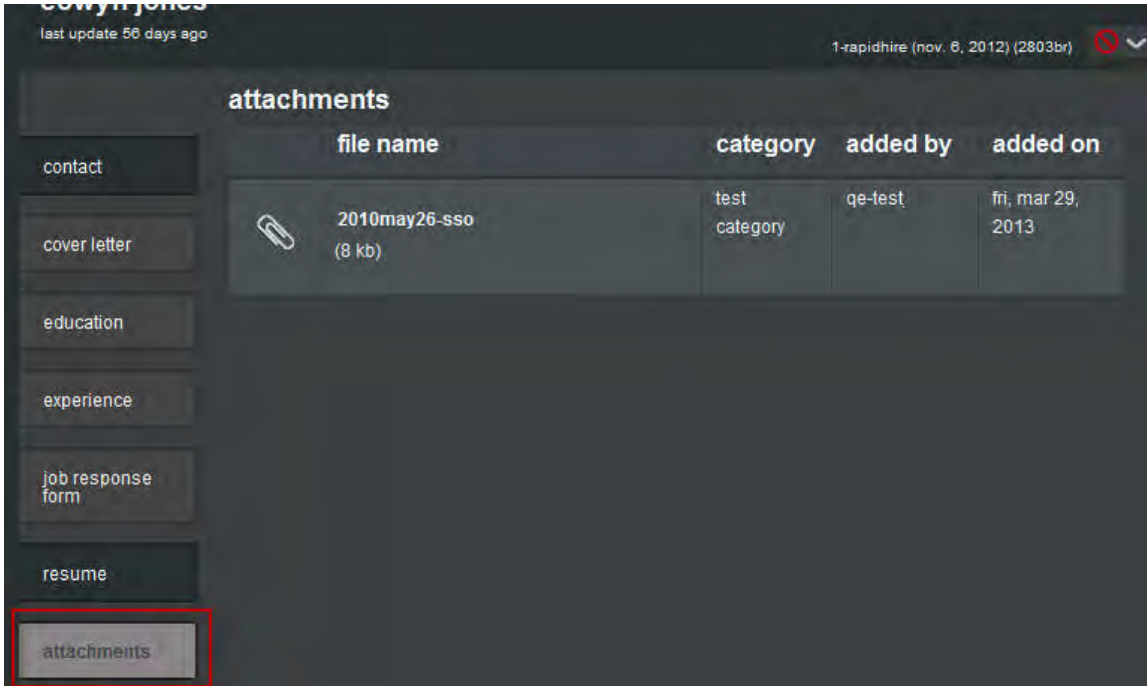
position specific q&a

Forms in add and edit mode have a RapidHire “skin.” This way they respect all the functionality of 2xB but have a the look/feel of RapidHire



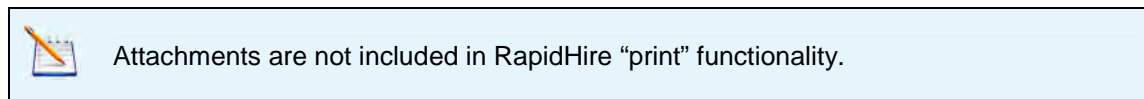
## Candidate Attachments

The display of candidate attachments can also be configured by user type. When configured, a new **attachments** button appears on the Candidate details page, as the last button prior to the forms buttons. Users see only the attachments to which they have privileges, including all non-req specific attachments and all attachments specific for the selected req.



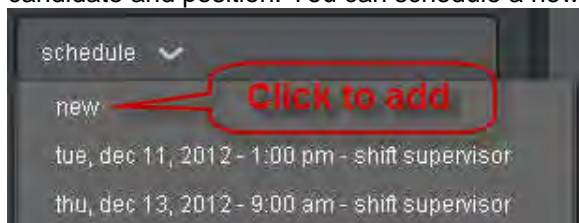
- The display includes:
  - file name – uploaded file name, followed by file size in parentheses.
  - category –attachment category selected while uploading or set during import
  - added by – 2xB user's name if uploaded from 2xB, candidate's name if uploaded from TG, in the format: <firstname> <lastname> <identifier (if enabled)>
  - added on – format: ddd, mmm dd, yyyy (e.g., tues, mar 12, 2013). Time does not display.

If there are no attachments, when the user clicks the button, a “No data found was found for this candidate” message displays.

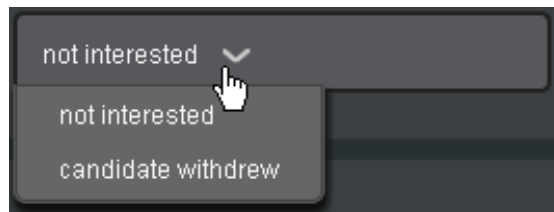
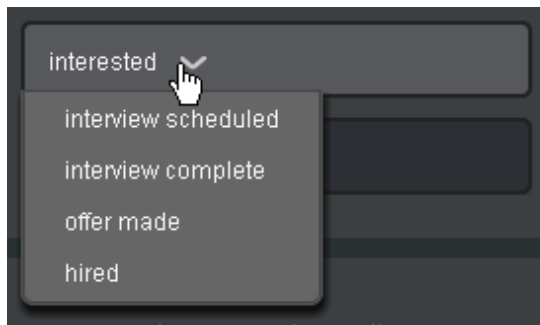


## Actions from Candidate's Details

- Schedule – click to schedule an interview for the candidate. This also shows upcoming interviews for the candidate and position. You can schedule a new interview or edit/cancel one, depending on your privileges.



- Interested/Not Interested – click to set the candidate’s next HR Status, moving the candidate forward (or not) in the hiring process. If more than one status is associated with the button (and they are available as “next” HR status for current HR status), you select from the list.



Buttons are hidden if:

- You do not have HR status - add/update in my reqs/my folders/my inbox OR HR status - add/update in all reqs/all folders/my inbox privilege
- No HR statuses are configured as options for the button.

Buttons also are disabled if candidate is already in the only associated HR status or no “available next” HR status exists.

Print – click and select from the data categories (per your user type’s configuration and privileges). Each category is pre-selected and can be deselected.

The area below these action buttons displays the candidate’s availability, the grid-field configured for display on the candidate listing page (if any).

## Interviews and Schedule

You can now see all interviews for which you are scheduled, regardless of whether you are part of the Req team, which previously was a requirement. Depending on how you invoke the display, two views present interview information:

- Interviews view shows candidate listing with summary of your interviews for any position for the next 7 days (default), past 7 days, or next 30 days.. From here, you can click any row to go to the candidate details (where you can schedule new or update existing interviews, if desired).  
Invoked from: interviews button on Manager ribbon
- Schedule view shows calendar view of your interviews, where you can view, edit, or cancel interviews depending on your privileges (requires “Change/Cancel all interviews” or “Change/Cancel interviews I have set” to edit/cancel).  
Invoked from: schedule button on Manager ribbon or candidate details (you can schedule a new interview only from the schedule button on the candidate details screen).

### Interviews View

Interviews view displays the candidates with whom you have interviews scheduled. This “Interviews view” also shows date, time and duration of the interviews. Highlighted candidates have interviews today.

	position	date	start	timezone	duration
<input checked="" type="checkbox"/> john doe last update 69 days ago	cashier	thu, jul 18, 2013	3:00 pm	est	45
<input checked="" type="checkbox"/> conrad jones last update today	sales	fri, jul 19, 2013	10:00 am	est	60
<input type="checkbox"/> john doe last update 69 days ago	supervisor	wed, jul 24, 2013	9:00 am	est	30

You can view interviews for:

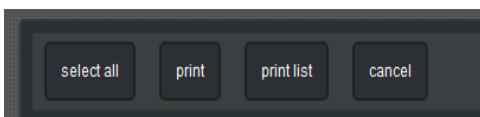
- Last Seven Days
- Next Seven Days (default view)
- Next Thirty Days

You can drill down to the candidate details, but need the following for additional actions.

- “View All” form privilege in order to view the candidate’s form if it was added by another user. If you do not have the privilege, the form data is completely hidden.
- “Add/View/Modify My” form privilege in order to add a new form (or view form added by “me”)
- My Req/My Candidate relationship to update HR Status (button appears if your user type has this setting, but is disabled if you do not have a “My” relationship to req or candidate)
- Appropriate Attachments privilege to view the associated attachment (Add/view/delete "My 2xB attachments," View "All attachments uploaded via 2xB," View "All attachments uploaded via Agency Manager," View "All attachments uploaded via Gateway")
- “Attachments - Sensitive attachments in my reqs only” privilege and have a My Req relationship to access sensitive attachments.

### Print Multiple Candidates

You can select multiple candidates from the “Interviews” listing page and print all their details at once. When you select one or more candidates, the top of the page (section where filter/search are displayed) changes to show a Select All option and the actions.



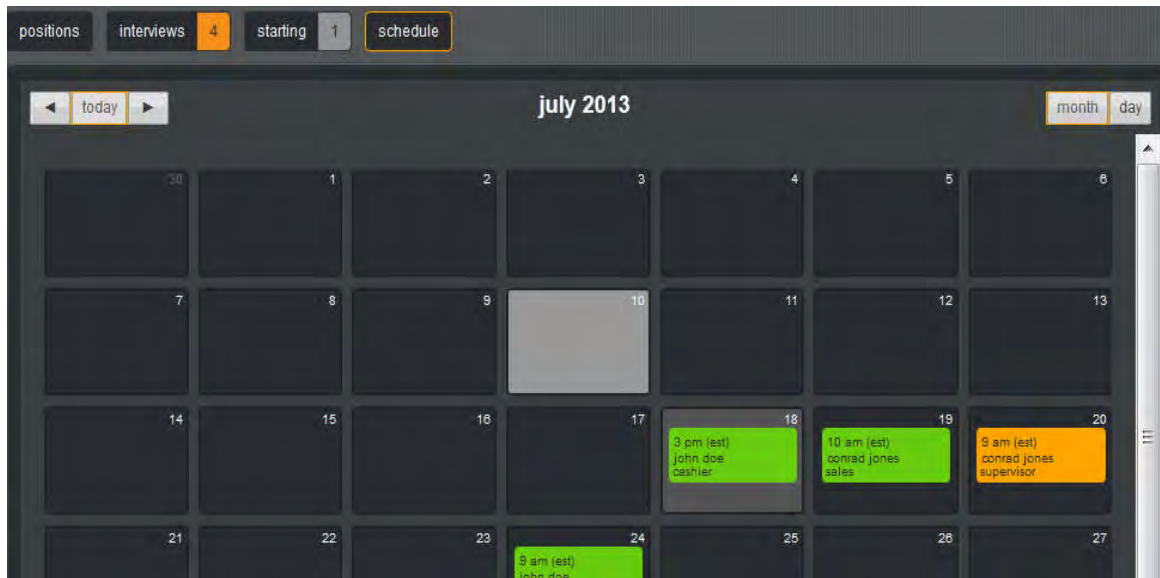
- Print List – click to print the data on the interview listing page (name, interview date, etc.) for those selected. You can select a maximum of 100 candidates to print a list.
- Print (Profiles) – click and select from the data categories (same ones that appear on Candidate details screen, per your user type’s configuration and privileges). Each category is pre-selected and can be deselected. If a candidate does not have a value for one of the selected items, the item is skipped in printing (no error messaging). The print-out starts each candidate on a new page.

There is no maximum for printing a list; you can choose a maximum of 100 candidates for printing details/profiles.

### Schedule View

To view your schedule of interviews for all your positions, click **schedule** in the manager ribbon. Schedule views also display time zone for which the interview was scheduled.

## Schedule this month



To move back or forward in the calendar, or to toggle between day or month views, use the controls at top left and right.

The screenshot shows the interview details panel for Conrad Jones, supervisor. The panel includes the following fields and controls:

- conrad jones**  
supervisor
- date**  
07/20/2013  
sat, jul 20, 2013
- start**  
9:00 am  
(est)
- end**  
9:30 am  
(est)
- duration**  
30  
(minutes)
- timezone**  
eastern time (us & canada)

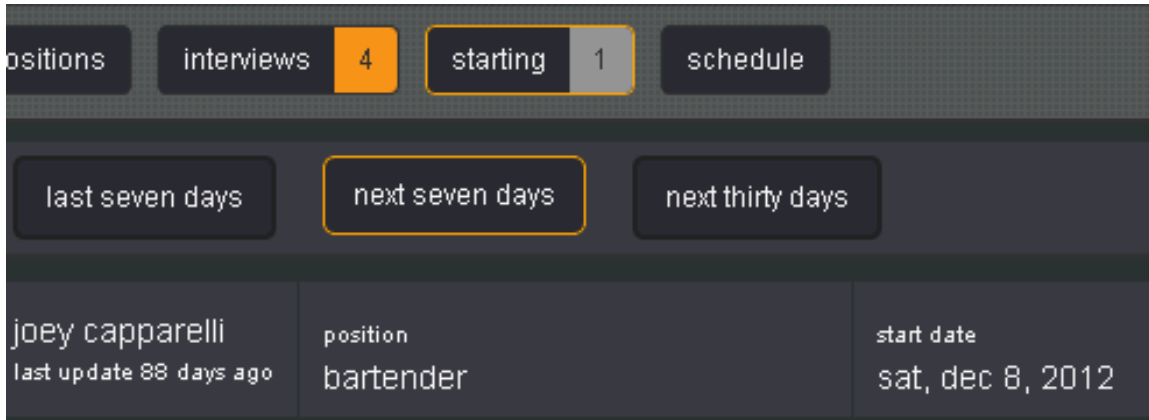
At the bottom of the panel, there are buttons for 'save' and 'cancel'.

To edit or cancel an interview, click it in the calendar to view interview details on the right.

- In the interview details panel, make your changes and **save** (all fields editable, buttons enabled as appropriate). (PC users can click and drag an interview to another date and interview details on the right will update; iPad users do not have the option to click and drag.)
- Cancel by clicking **cancel event** twice (Note: first click turns button red, that is the “confirmation” signal – click again to complete cancellation).

## Starting

The starting button shows the count of people starting in the next 7 (default), 30, or last 7 days, based on the candidate values for “select start date” per-req form field configured in Workbench. Highlighted candidates are starting today.

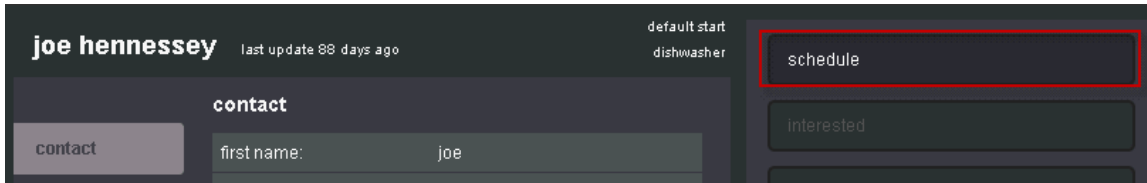


## Scheduling a New Interview

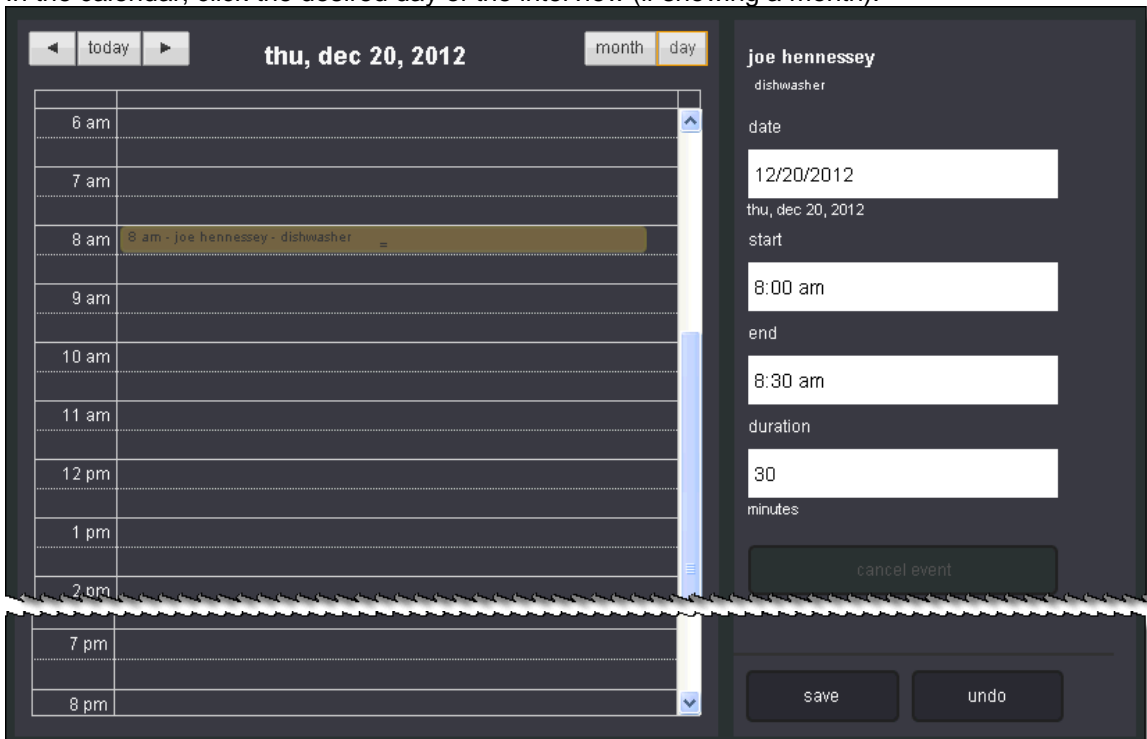
New interviews can only be scheduled from the candidate details screen.

To schedule a new interview:

1. Click schedule on the candidate's details screen.



2. In the calendar, click the desired day of the interview (if showing a month).



3. On the time schedule, click the desired interview time.



PC users can click and drag a time block to another start time (interview details update). They can also click bottom portion of interview and drag to another end time; iPad users do not have the option to click and drag. For a longer time block, iPad users can edit the interview details to change the end time.

4. Interview details appear on the right, where you can verify before clicking **save**.

## General Scheduling Rules

- Interviews scheduled within RapidHire use a default time zone of Eastern Standard Time ((New York, GMT-05:00). EST zone is not displayed in RapidHire.
- When a 2xB user schedules an interview on behalf of a RapidHire user, RapidHire shows no time zone, just the 2xB user's scheduled time. For example, if the interview is scheduled for 3:00 pm EST, all RapidHire users will see the time as 3:00 pm
- If the duration set in RapidHire does not match the preconfigured options available in 2xB, then when that interview is viewed in 2xB, a temporary option reflects the RapidHire duration. The option is available for display only, not for scheduling new interviews in 2xB.
- 2xB users cannot schedule interviews to occur in the past, but there is no such restriction/safeguard in RapidHire.
- Interviews that have not yet occurred in RapidHire have the status "Accepted" in 2xB. Interviews that have passed have the status "Complete" in 2xB.

## How Do Clients Get this Feature?

This feature is controlled by client settings and configurations by user type in Workbench. Please contact your Kenexa Support Team for more information about enabling this feature.

## Workbench Self-Service Certified Users

The following are the user type privileges to be enabled for each of the corresponding RapidHire buttons:

- Position: "MyReqs" > "My Reqs – view open." If the user does not have the privilege, clicking the button displays a blank page with the text, "No results found."
- Interviews/Schedule: "Scheduling" > "Change/Cancel all interviews," "Change/Cancel interviews I have set," Requests/Schedule interviews." Note: RapidHire users can always view their interviews – the privileges above control whether these users can schedule new, edit, or cancel their interviews.
- Starting: for the form and form field selected for the "Select Start Date" in the Workbench configuration, user must have form privilege for "Add/view/modify my," "View my reqs" or "View all." The form field cannot be set as Hidden for this user type nor Hidden for current language.  
If the form field would be hidden, but user is configured to see the Starting button, clicking the button displays a blank page with the text, "No results found" (even if some candidates exist in the user's positions with the appropriate form field value corresponding to the next 7 days).

# Kenexa Tasks

These features new with Release 13.3 require configuration:

- [Default Landing page](#) (other than Positions)
- [Display ReqID](#) (on Positions page)
- [Column heads](#)
- [Display candidate's attachments](#)
- [Alert that candidate is in selected HR Statuses for additional reqs](#)
- [Forgot password retrieval on-screen](#)

## Workbench

### Client Settings

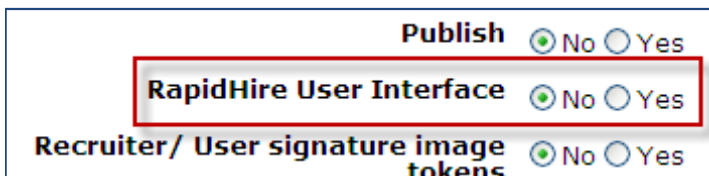
An existing client setting activates the RapidHire login URL and the action to configure RapidHire for user types.

A new client setting, “**On-Screen Forgot Password Reset (Suppress E-mail)**” allows user types (configured with a setting of the same name) to complete password recovery/reset on-screen if the user enters correct username and has a security question already configured. To use this feature, clients must also enable the **Activate security question for 2xB** client setting:

### RapidHire User Interface

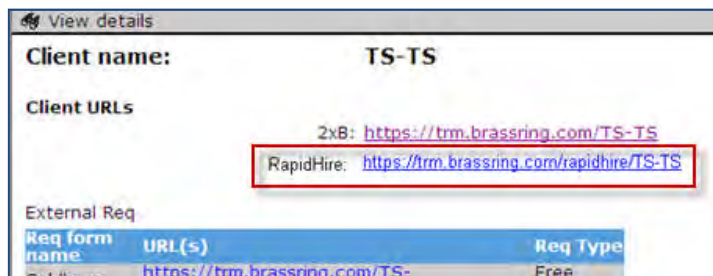
Client setting

**WB > Admin > Manage clients > Edit client settings** [restricted section] > **RapidHire User Interface**



When the client setting is set to **Yes**:

- RapidHire URL displays on the client's View details page (WB > Manage clients > View details [for selected client]) . URL format is: [https://trm.brassring.com/rapidhire/CLIENT\\_NAME](https://trm.brassring.com/rapidhire/CLIENT_NAME)



- Configure RapidHire action becomes available from the User Types page (**Tools > Users > User Types**).

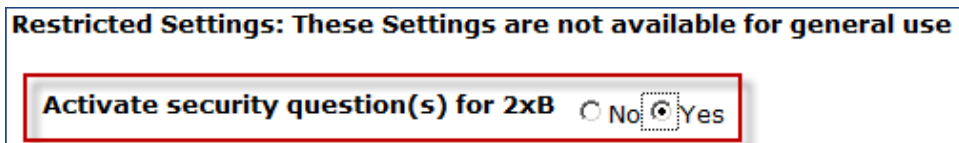


If at least one user type is configured for RapidHire, the client setting cannot be changed from Yes to No. When set to **No**, you cannot configure a user type for access to RapidHire (clients effectively have no access until this is done).

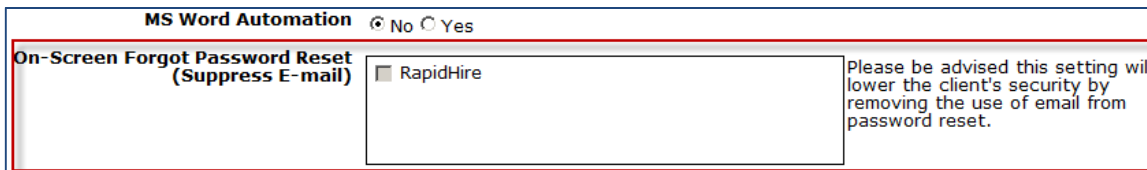
### On-Screen Forgot Password Reset (Suppress E-mail)

Enabling the **Activate security question for 2xB** client setting is a prerequisite for using the On-screen Forgot Password Reset feature.

**WB > Admin > Manage clients > Edit client settings** [restricted section] > **Activate security question for 2xB**.



**WB > Admin > Manage clients > Edit client settings** [restricted section] > **On-Screen Forgot Password Reset (Suppress E-mail)**



Check the **RapidHire** box, and set the **On-screen forgot password reset (suppress e-mail)** setting on the **Configure RapidHire** page for desired user types (see following section and figure). Users entering the correct username in the Forgot password workflow (and who have security question & answer configured) are prompted on-screen to answer their security question. Note that this is a less secure method than using secured email for the password reset.

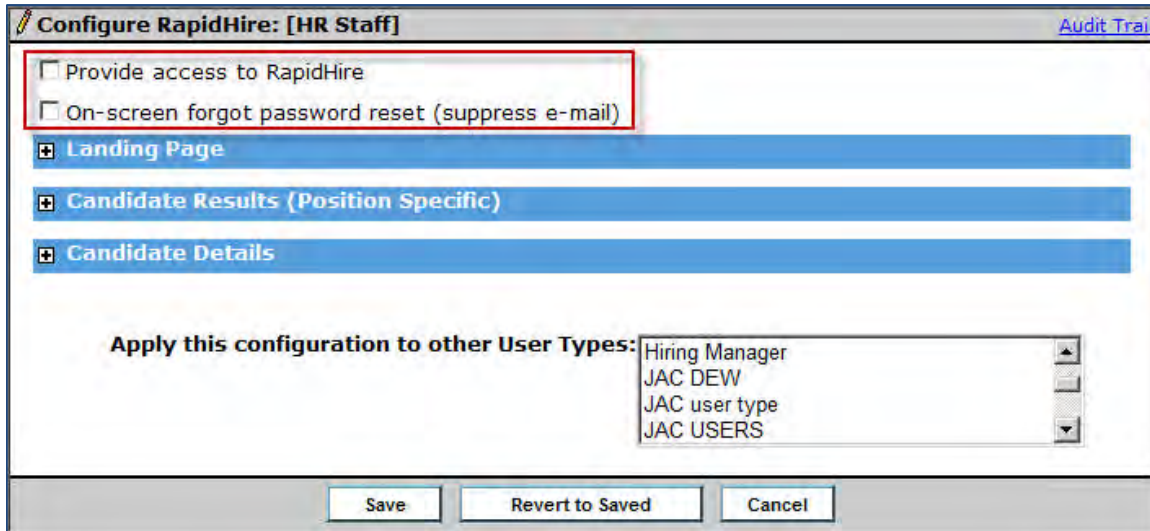
### Configure User Type Interface

Once the **RapidHire User Interface** client setting has been enabled, Workbench *Super User* and *Tech Services* user types can configure the user interface for the 2x BrassRing user types who will be using RapidHire. The following Workbench user types have access to *view* the configuration: Help Desk, Self-Service Tier 1 and

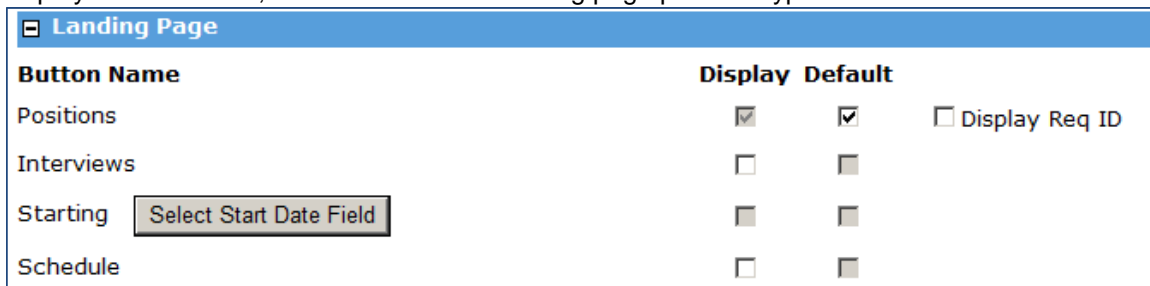


greater. Note: 2x BrassRing users must have access as a “2xB user” and the relevant 2xB user privileges (for functionality, candidate forms, and HR statuses).

1. Select a user type in **Tools > Users > User types** and click the **Configure RapidHire** action. This opens the Configure RapidHire screen (or opens a view-only page for Workbench users with access only to view).



2. Check **Provide access to RapidHire**. When users attempt to sign in to RapidHire, the system will check to confirm they have privileges to access RapidHire and will deny access to any user type for which the box is unchecked.
3. For users who click “Forgot Password,” to prompt them on-screen to answer their security question, rather than sending an email, check **“On-screen forgot password reset (suppress e-mail).”** If the user enters correct username and a security question is already configured for this user, then user is immediately presented with the security question on-screen in the RapidHire UI. If the user does not yet have a security question configured, then password recovery is carried out via email.
4. Expand and complete each section. For Landing Page, select the buttons/functionality that should be displayed for the user, and set the default landing page per user type.



- **Positions** previously was the default landing page, which could not be de-selected. As of R13.3, if you choose a different display page as the default, you have the option not to display the Positions button/view (by unchecking its Display box if a different page is the default). If you are displaying Positions for the user type, you can display the req ID as well, check **Display ReqID**. The ID will display below the req title, either AutoReqID or CustomReqID depending on the “ReqTrigger” client setting.
- Interviews will show the Interview button and candidates with interviews scheduled.
- To set the field that determines which candidates will be selected for display for the Starting button functionality (as “Starting” their employment), click Select Start Date Field and select from all active per Req candidate date type form fields. (Once selected, cannot then be “hidden for this user type”.)  
Schedule

- Schedule show the Schedule button and functionality.

5. In the Candidate Results (Position Specific) section, each row within the Candidate Data – Columns section equates to a column displayed in RapidHire. Configure column display, filtering, and sorting here.

- **#:** shows the order of the field, with a mechanism to re-order the fields.
  - **Select Field:** select unique column fields from your active, outputable custom candidate form fields, and outputable applicant master and panel standard fields. You can select fields for up to 15 rows, but display maximum of 10 in RapidHire.
- Value displayed is the base locale translation; to set custom labels to display instead of the standard column headings on the Candidate Results screens, click Display Name column's **Translations** button:

- Enter text for the selected field to display instead of the standard text, maximum 255 characters, no HTML.
- Provide translations so that the custom label appears in the language appropriate for the user's locale.
- Custom label also applies to the grid field displayed on the Candidate Details page that shows candidate availability.

These fields are not available for RapidHire: Agency and Employee Referral, Communication, Folder, Forms, Notes, Viewed, Name.

Only these panel standard fields are available: Address 1, Address 2, Candidate ref num, City, Country, Date last loaded, Degree, Educational Institute, Email, Employer, Field of study, First name, GPA, Grad year, Home phone, How received, Language, Last codes, Last name, Location, Other phone, Position held, Work start year, Zip/postal code.

- **Display (limit of 10):** check a maximum of 10 rows to display the selected field in the candidate grid section. Select no more than 1 grid-type field for display.

- **Filter (limit of 5):**] check a maximum of five filter fields. You can select the same fields for both grid display and filter. Select no more than 1 grid-type field for display.
- **Sort Order:** for fields by which you want to sort, select unique sort order number (1, 2, or 3), and whether you want that sort to be Ascending or Descending. You cannot select multi-select fields (including multi-select, checkbox, and grid fields) for sorting,
- **Show grid-type field rows as columns in RapidHire** (recommended if # columns is greater than # rows): Check this option (below the candidate fields) to change the x and y axes for grid-type fields.
- **Enable search filter** (This will use keyword search to filter the candidates the user is currently viewing; candidates outside the position/requisition will not be considered. The following data elements will be searched: all displayed output fields, all fields available for filtering, as well as the contact, education and experience fields from the candidate profile): check to use.
- **View candidates in increments of:** select the desired display increment from 10, 25, 50, 100, All (the default), Other.  
When selecting Other, also enter the desired 3-digit numeric value.

6. In the **Candidate Details** section, select the “Talent Record” display and HR statuses.

**Candidate Details**

Candidate Data	Display	Default View
Attachments	<input type="checkbox"/>	
Contact Info	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cover Letter	<input type="checkbox"/>	<input type="checkbox"/>
Education	<input type="checkbox"/>	<input type="checkbox"/>
Job Response	<input type="checkbox"/>	<input type="checkbox"/>
Resume	<input type="checkbox"/>	<input type="checkbox"/>
Work History	<input type="checkbox"/>	<input type="checkbox"/>

**Forms**

Alert if candidate is in any of the following HR statuses in any additional reqs

Phone Screen - ENG  
 Test Finals  
 Final test-us  
 Second Interview  
 Test\_intermediate\_status

Show details (job title, location/division, HR status, HR status update date)

**Actions**

Interested HR Status Button Label  [English (US)]

**Available HR Statuses:**

Second Interview  
 Test\_intermediate\_status  
 Reference Check  
 Test Intermediate  
 Active, Start Status  
 Offer Accepted  
 Offer Extended  
 Offer Declined  
 TestToCheckPopupdForm  
 Company not interested  
 Candidate not interested  
 Test\_final\_status

**Interested HR Statuses:**

Not Interested HR Status Button Label  [English (US)]

**Available HR Statuses:**


Offer Accepted  
 Offer Declined  
 Company not interested  
 Candidate not interested  
 Test\_final\_status  
 Offer Accepted - Duplicate CJB  
 Background Check Integration  
 Ann Hired (& Final) Status (Final Status C)  
 Ann Not Hired status (Final Status D)  
 Ann Final Again (OFFER ACCEPTED)

**Not Interested HR Statuses:**

- Candidate Data:** select categories (RapidHire equivalents to the categories from the 2xB Talent Record) to display, and select which section will be the default view.
 

**Attachments** is a new configuration option. When checked, a new “Attachments” button will be placed on the candidate details page, as the very last button prior to the forms buttons. All attachments, specific for this req and non-req-specific, will be displayed, although the user will only see those attachments they have privileges to view on the list of all attachments. If there are no attachments, the button will have the same treatment as the form button does when there are no forms. When clicked, the standard “no data found was found for this candidate.” message will be displayed. No functionality to add or delete attachments will be supported in RapidHire, and they are excluded from Rapidhire print function. Attachments cannot be set as the default display.

- **Forms:** select desired forms from all the active candidate forms to display. This is also where you remove forms no longer desired. If you select a multiple-per-candidate form; the most recent version will display in RapidHire. Selected forms will display **add** and **edit** options, if user type privileges are available and other conditions (form existence / type) are met.
- **Alert if candidate is in any of the following HR statuses in any additional reqs:** check to alert users that candidates they are viewing are in any of the HR statuses (you must also select at least one) for any additional reqs (excluding secure reqs). A visual indicator appears on the candidate listing page and carries through to the candidate details page.
- **Show details (job title, location/division, HR status, HR status update date):** check to show the details (listed in the parentheses) for any candidates showing the additional reqs alert indicator. The information is shown on the Candidate Details screen. (Disabled if "Alert if candidate is in any of the following HR statuses in any additional req" checkbox is unchecked.)
- **Actions:** Specify the labels for the buttons to be clicked when users are *interested* in candidates (want to move candidate(s) forward in the hiring process) or *not interested* in the candidates. Click the + sign to provide translation for each of your purchased locales. Select any HR Statuses to be associated with each dispositioning button. If you choose more than one HR Status, after users click the Interested/Not Interested button they will select from those that are available as "next" HR Statuses from the current HR Status. If you select no HR Status for a button here, that button will be hidden on the Candidate Details page in RapidHire and on candidate list screens (Position-specific, Interviews, Starting) when mass-action menu is enabled.



Select only HR statuses that are not used for reapply, or they will not be available to RapidHire users selection (even though they will appear in this Available HR Statuses list). You can check this **Tools > HR Statuses > Edit/View** in the **Talent Gateway & Agency Manager settings** section: use only those statuses with "Reapply settings: Status allows for reapplies: No."

**Talent Gateway**  
**Reapply settings** Status allows for reapplies: No

7. Select the additional user types to which you want these configuration additions/changes to apply. (The user type selection applies only the current set of configurations being saved. You must reselect each time the configuration is edited.)

**Apply this configuration to other User Types:**

For Performance Testing

HR Executive

HR Staff

John-Persist-001

8. **Save** the configuration.

# Reqs – Enforce Final HR Status when Closing

With this feature, the behavior of all reqs, regardless of whether they originate in 2xB or in an external application integrated with 2xB, becomes consistent with respect to the req template attribute, “Enforce final status of all candidates.”

<b>Product</b> RDP 630, 762 Release 13.3	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document sent for each release build.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Specific conditions required – see details below.	

## Feature Description

An existing req template attribute, “Enforce final status of all candidates,” is designed to ensure that all candidates within a req folder are updated to a final disposition HR Status before the req can be closed. This attribute previously applied only to reqs created in 2xB. However, for reqs originated in an external system that were imported in to 2xB via an XML integration, the req folder owner was able to close the req even if some of the candidates were in a non-final status.

With this feature, the behavior of all reqs, regardless of whether they originate in 2xB or in an external application integrated with 2xB, becomes consistent with respect to enforcing the final HR Status when **Enforce final status of all candidates** is enabled. Additionally, a new client setting allows clients to control the specific req statuses for which the setting will apply.

## 2xB User Experience

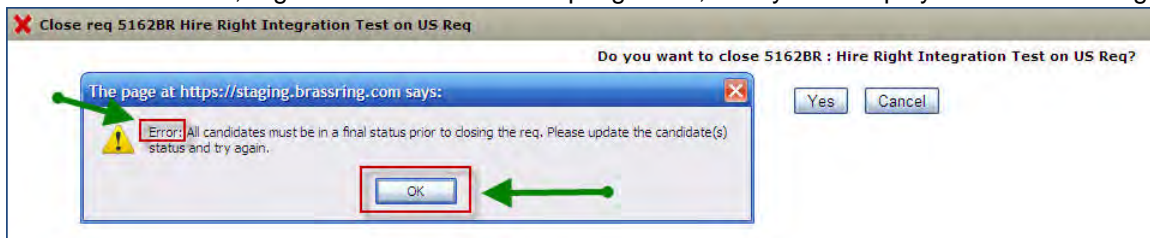
The “close” actions for which moving all candidates to final HR Status may be enforced via the **Enforce final status of all candidates** attribute include:

**Closed, Canceled, Deleted, or On hold**

Enforcement is required for “Closed”, and the new client setting can limit the enforcement to one or more of the other actions, as desired by your organization.

With the **Enforce final status of all candidates** req template attribute set:

- When a 2xB user attempts to “close” any requisition for which candidates are present in its req folder in a non-final HR Status, regardless of where the req originated, the system displays an error message.



This action can be completed only after the user moves all the candidates to a final HR Status.

- For reqs that are opened via XML by a system integration with 2xB, when an XML import attempts to “close” the req while candidates are present in its req folder in a non-final HR Status, the XML import fails. A failed message is sent to the third party system. (If the “Enforce Final Status” requirements are met, the req import will continue to work as it does today.)

## How Do Clients Get this Feature?

This feature is controlled by a new client setting and an existing req template setting. Please contact your Kenexa Support Team or Certified Workbench User for more information about enabling this feature.

## Workbench Self-Service Certified Users

The existing “Enforce final status of all candidates” req template attribute now also applies to reqs being closed via req import (as well as reqs being closed from within 2xB).

**Tools > Forms > Reqs > Req forms > Edit form attributes** [for selected form]

**Edit Req form** Audit Trail

**Req URL**  None  Free standing  E-mail request

**Form layout**  Classic  Enhanced

**Restrict access by IP address:**  Yes  No

**Authorized IP address values:** Entered (0)

**Approval process**  Yes  No  Rules-based **URL:**

**Cascade approver messages**

**Org groups with access**

- Manager(YA)
- Standard Group

**Proximity coordinates**  No  Yes  **Required field**

**Enforce final status of all candidates**  No  Yes  Exclude "Evergreen" requisitions

**Display Notes tab**  No  Yes

**Autofiler notifications**  On  Off

# Kenexa Tasks

New “Req final status selection for enforcing final status” client setting allows a client to determine for which final statuses enforcement applies.

## Workbench

When enabling “Req final status selection for enforcing final status” client setting, select final statuses for enforcement of the **Enforce final status of all candidates** req form attribute:

- Canceled (must remain selected)
- Closed
- Deleted
- On hold

The first three are selected for enforcement by default. Canceled value must remain selected.

### Admin > Manage Clients > Edit client settings

Edit client settings Audit Trail

**Req subsidiary forms**  No  Yes

**ReqAllowReapplies**  No  Yes

**ReqAutofile** Yes ▾

**ReqDeclineEnable**  No  Yes

**ReqEmailEnable**  No  Yes

**Req final status selection for enforcing final status**

- Canceled
- Closed
- Deleted
- On hold

**ReqTrigger** Auto ▾ Do not change before consulting SE

**Require a message when declining req approvals**  Yes  No

**Require a message when rerouting req approvals**  Yes  No

**Restrict access by IP address**  Yes  No

**Restrict access by IP address: Authorized values** Entered (0)

**Rules Automation Manager**  No  Yes

**Search Engine Optimization**  No  Yes

**Search Reason**  Free Form  Pre-defined

**Search Reason Overnight Default** Proactive Sourcing

**Send job posting to Broadbean without intermediate page**  No  Yes

**Send job posting to SmartPost without intermediate page**  No  Yes with job creation page  Yes with source page

**Send req translations to TalentBrew without intermediary page**  No  Yes

**Session Expiration Warning Prompt: 2xB** 10 min ▾

**Session Expiration Warning Prompt: Agency Manager** 5 min ▾



## Reqs – Enhanced Layout and Workflow Phase 2

Additional features and support for the enhanced layout for reqs (introduced with Release 13.2) are available in Release 13.3.

<b>Product</b> LDP 092 Release 13.3	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – details in <i>Visible Changes</i> document sent for each release build.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.	

### Feature Description

Additional features supported by the enhanced Req Layout (visible changes for clients currently using these features with enhanced layout reqs):

- [Embedding of URLs](#) in Job Description
- Edit Req - support for client setting to “[Display inactive options](#)”
- [Req Approvals](#) - Addendum forms for Declined or approved statuses; abridged view (will display in classic layout); SmartApproval workflow during approval
- [JCDD defaults on Req edit](#) honors multi-language workflow
- [Secure req indicators](#) on view and edit
- [Interview Builder integration](#) support
- [Validation of optional requisition ID](#)
- [Right-to-left support](#) for Arabic and Hebrew users

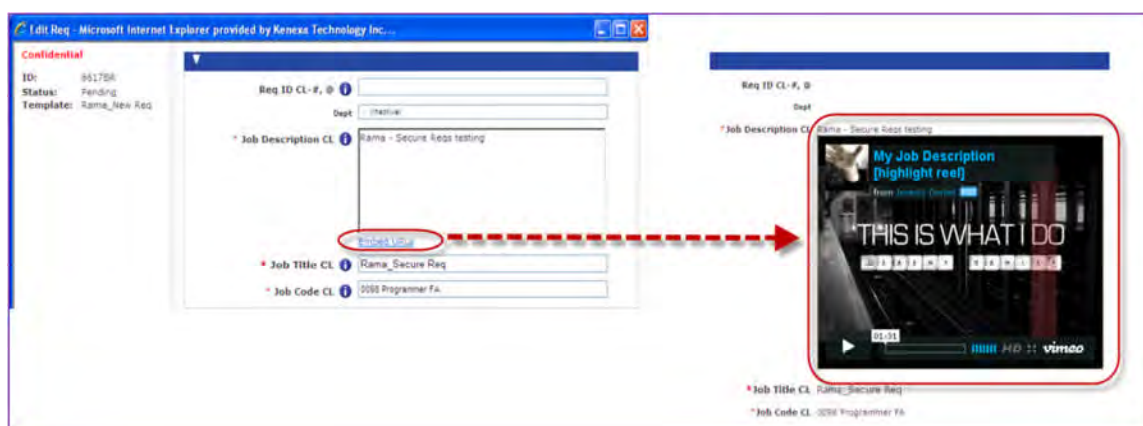
New features supported *ONLY with the Enhanced Req Layout* (Requires configuration):

- Configurable [Field level help text](#)
- [Question branching](#)

### Embed URLs in Job Description - Add/ View/ Edit Req

Enhanced Layout now supports the feature that allows users to embed URLs for videos or QR codes in the Job Description field.

When the client setting is enabled, users see and can click an “**Embed URLs**” link below the standard Job Description field when adding or editing a req. After the URL or code has been embedded, the view page shows the video or code embedded, as shown below.



### How Do Clients Get this Feature?

The existing Workbench configuration for classic layout now applies for extended layout:

Kenexa Support Team enables **Embed URLs** client setting, selecting one or both of the options (**Video – job description, QR code – job description**).

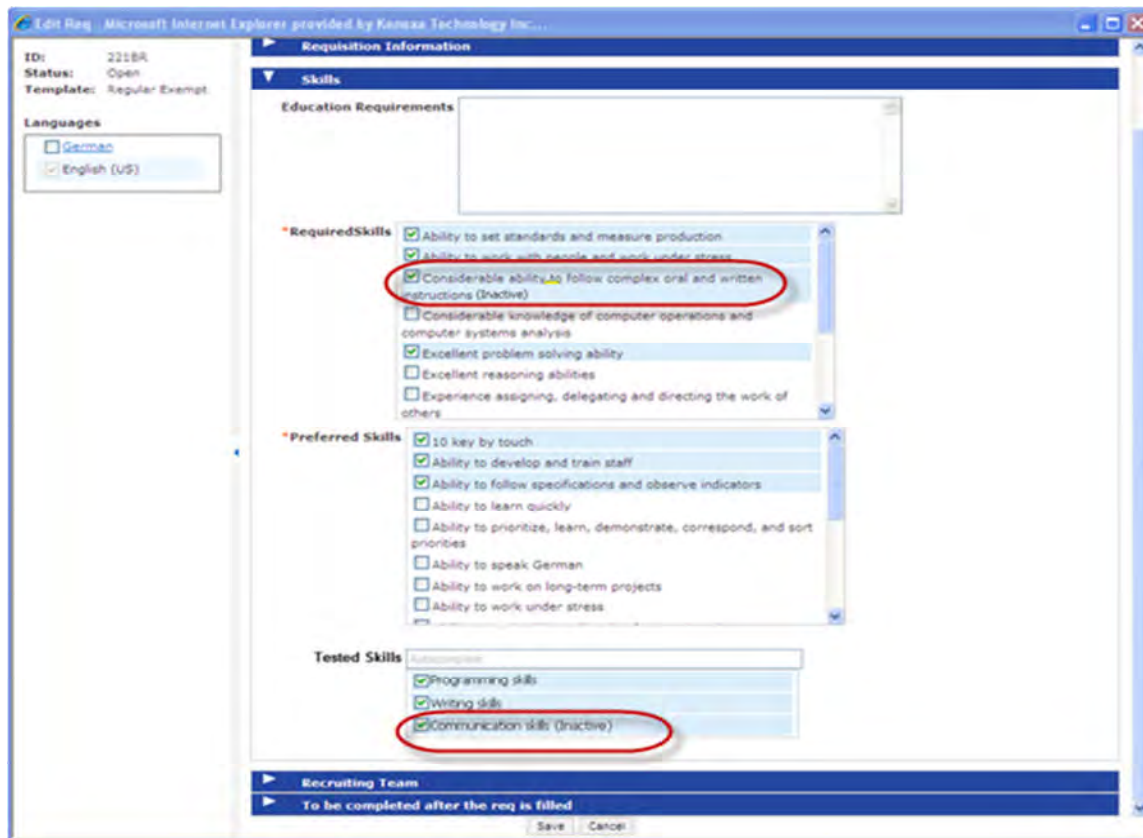
## Edit Req - Display Inactive Options

When the client setting for displaying inactive options is enabled, the inactive selected options display as “selected” in edit mode.

Behavior is the same as for classic functionality:

- If a previously selected and saved option is inactivated, then it is displayed with "(Inactive)" in Req edit mode.
- If the option was not selected, and it becomes inactivated, then it does NOT appear in the options list in Req edit mode.

The "(Inactive)" text is translated and appears in the appropriate language on toggle.



## How Do Clients Get this Feature?

The existing Workbench configuration for classic layout now applies for extended layout:

Kenexa Support Team sets the “**Display inactive options in edit mode for Reqs and Candidate forms**” client setting to **Yes**.

## Req Approvals

In the area of req approval workflow, this release provides:

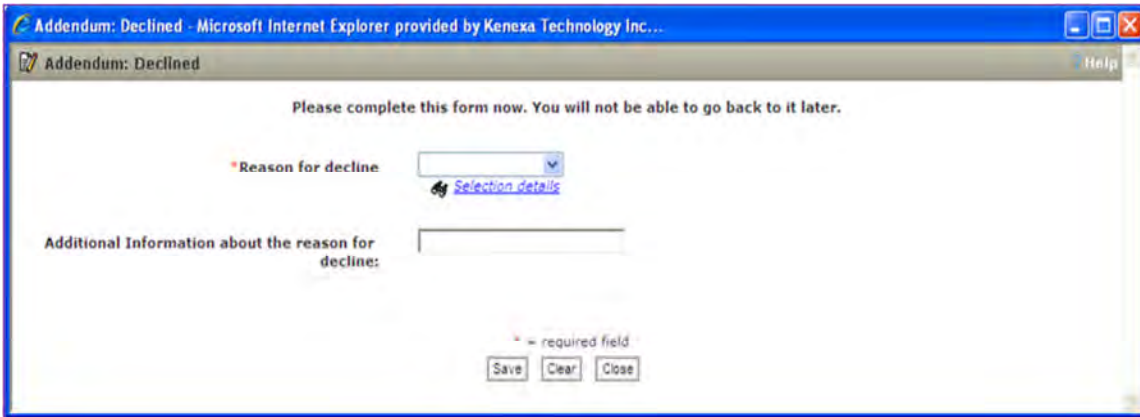
- Addendum forms for Declined or Approved statuses
- Abridged view (will display in classic layout)

- SmartApproval workflow during approval

### Addendum Forms

If a Req addendum form is configured to appear for the Declined or Approved statuses, the enhanced layout now supports display of the classic form. This behavior is the same as for classic functionality.

**Decline:** Once the user clicks decline, the configured addendum form launches in a child window. The following figure shows a classic Addendum form popup configured for Decline status.



**Approved:** This behaves the same as described for Decline, except the Approved status is selected and the user must be the last approver in the approval routing (therefore making the Req status "approved").

### How Do Clients Get this Feature?

The existing Workbench configuration for classic layout now applies for extended layout:

The Req addendum form is created by the Kenexa Support Team (**Tools > Forms > Reqs > Req status change addendum**). They also configure it for the approval status change (**Tools > Forms > Reqs > Req forms > Edit status notification(s) & addendum form** [for selected template], selecting status of Approved or Declined and selecting at least one field in the "Select addendum form fields" section.

### Abridged View

If any approver has the attribute "Enable abridged Req view" selected at the approval level, then an abridged view of the req is displayed in classic layout when sent via eLink to an approver, even if it is an enhanced layout req.

For example, the fields configured for the abridged view display within the following classic layout.

Approve Decline req: 6607BR Rama\_Abridged view

? [Help](#)

Approve

Message

Req details

\*Job Code CL E040 HR Training Cons/c [List >>](#)

\*Job Title CL Rama\_Abridged view

\*Job Description CL **Text Editing Area**  
Rama\_Abridged view

### How Do Clients Get this Feature?

Certified Self-Service users or the Kenexa Support Team set the custom fields to be shown for the abridged req approval view in **Tools > Forms > Reqs > Req Forms > Administer req fields** [for selected template] > **Define** . (By default, the standard fields display as configured).



When configuring the req approval abridged view for mobile devices, ensure the selected custom display fields configured in “Define approval abridged view” are also selected in “Define mobile display fields” (**Tools > Forms > Req forms > Define custom req fields** ). For an eLinked req approval request, mobile devices display only those custom req fields chosen in *both* configurations.

To see the abridged view, approvers need “Enable abridged Req view” selected for the approval group to which they belong. This can be set by certified Self-Service users or the Kenexa Support Team in **Tools > Forms > Approvals > Edit** [selected approval group] > **Enable abridged Req view**.

### Smart Approval Workflow

When SmartApproval is configured for a classic req template, none of the standard approval section or fields display in the enhanced layout when a user creates a req. On Save, no confirmation message displays, but instead the user is redirected to the configured SmartApproval URL, in a pop-up window. The behavior is now the same for enhanced layout reqs.

This is applicable to all Add Workflows i.e.,

- Reqs > Add new req,
- Quicklinks > My Reqs > Add new
- Add via free-standing URL or Email request
- eLink blank Req

## How Do Clients Get this Feature?

Req template attribute: **Approval process** must = **Rules-based** with valid SmartApproval URL.

## “JCDD defaults on Req edit” Honors Multi-Language Workflow

In the first phase of the enhanced layout for reqs (Release 13.2), when the client setting for “auto fill of JCDD on edit” is enabled, then the updates were made only in the current language of the enhanced layout. This release supports multi-language workflow, and propagates the updates across all languages with the JCDD defaults.

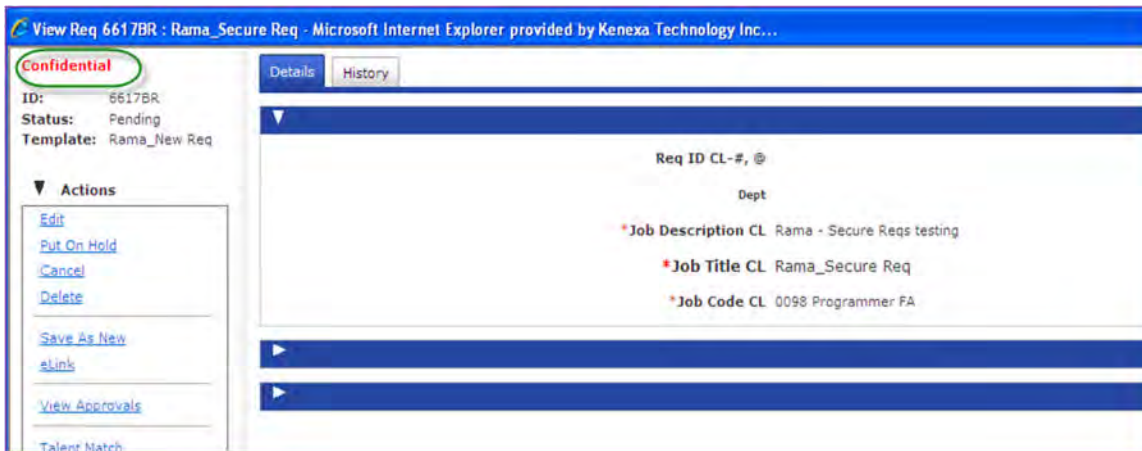
## How Do Clients Get this Feature?

The existing Workbench configuration for classic layout now applies for extended layout reqs:

Kenexa Support Team sets the “**Auto fill of JCDD on edit**” client setting to **Yes**.

## Secure Req Indicators

Enhanced Layout now supports the classic indicators for Secure Req. Req. designated as “secure” are marked with a “Confidential” watermark, in all the View and Edit modes.



- In Edit and Save as new, if the field that drives the Secure Req designation is changed to a value that IS NOT designated as secure, the Confidential watermark does not disappear even if the req is saved and viewed/edited once again.

## How Do Clients Get this Feature?

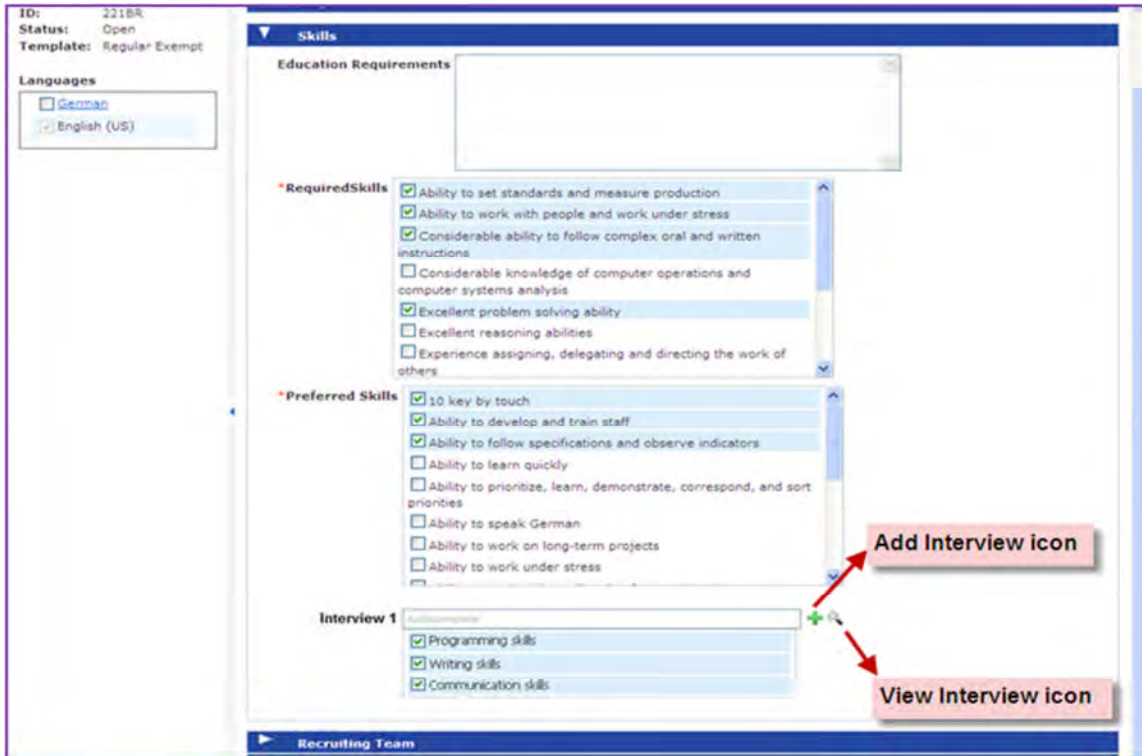
The existing Workbench configuration for classic layout now applies for extended layout reqs:

Kenexa Support Team sets the “**Secure Reqs**” client setting to **Yes**.

Kenexa Support Team or certified Workbench Self-Service user configures security rules for the req form according to the “Req Security Admin” configuration settings (**Tools > Forms > Reqs > Req forms >[select form] >Req security rules** action).

## Kenexa Interview Builder Integrated for Add Req

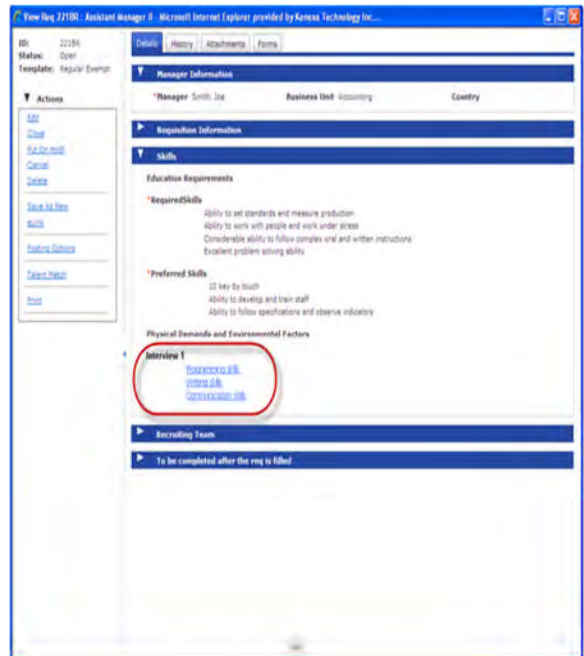
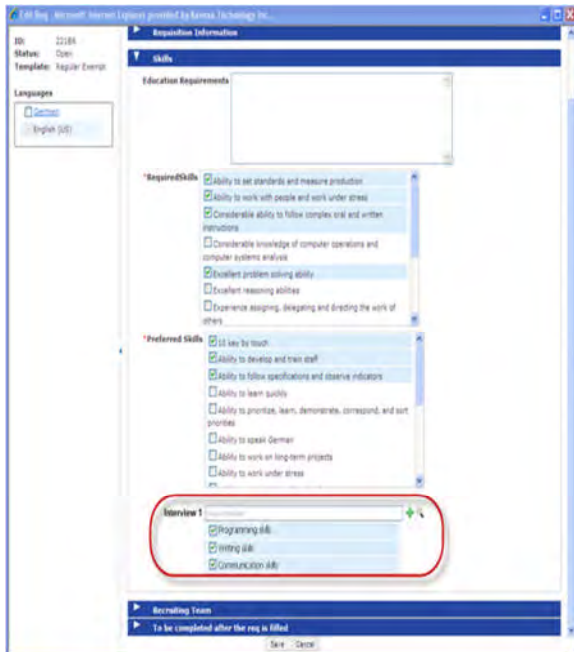
User type privileges and the necessary configurations for Kenexa Interview Builder (KIB) are now fully supported with enhanced layout reqs in Add, Edit, and View modes. The following figure shows the Add Req page when one or more interview fields have been configured.



- Linked text has been replaced with icons: plus sign to **Add Interview**, magnifying glass to **View Interview**.
- As a best practice – if any of the interview fields are used on a req template, select the job code prior to selecting any interviews. This ensures that selections are correct for the job code. Selections made prior to the job code's being selected may be lost.

**Edit Req – KIB Integration**

**View Req – KIB Integration**



### How Do Clients Get this Feature?

The existing Workbench configuration for classic layout now applies for extended layout reqs, and is available automatically for clients using Interview Builder:

Kenexa Support Team sets the “**Integration Interview Builder**” client setting to **Yes**.

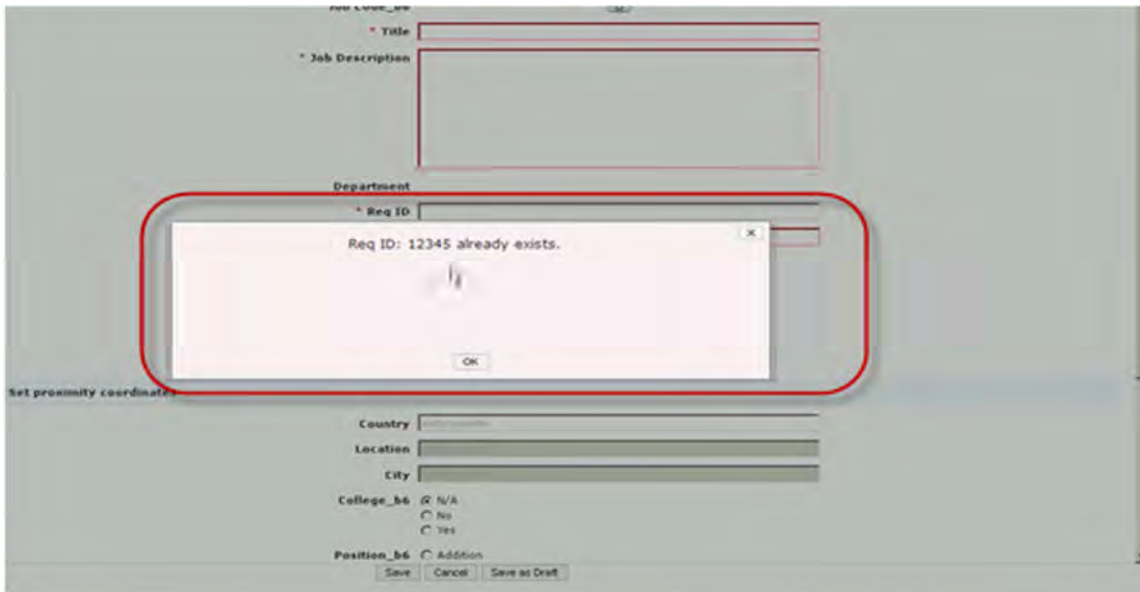
Kenexa Support Team or certified Workbench Self-Service user adds one or more of the five custom Interview fields to the req template with Enhanced layout.

Kenexa Support Team or certified Workbench Self-Service user assigns appropriate Integrations > Interview Builder user type privileges.

### Validation of Optional Requisition ID

The Req Add mode for enhanced layout now supports optional Req ID validation when the client setting “Req Trigger” is set to “Optional.”

Validation for duplicate Req ID is conducted after a user enters a Req ID and then tabs or clicks off the field.



The “ID already exists” error message displays if the user enters a Req ID that already exists.

### How Do Clients Get this Feature?

The existing Workbench configuration for classic layout now applies for extended layout reqs:

Kenexa Support Team sets the “Req Trigger” client setting to “Optional.”

### Right-to-Left Language Support

Enhanced layout reqs now support the following for right-to-left language interfaces (Arabic and Hebrew):

- Overall layout of the enhanced layout has right-to-left orientation, with the “left” navigation bar on the right
- Fields with orientation of labels beside input areas are reversed; the label is on the right with input on the left
- Multi-column layouts are reversed; the right-side column as configured in Workbench appears on the left side, and left side appears on the right side.
- Field Help Text
- Calendar control
- Multi-select field types and Auto-complete field types
- YUI Editor



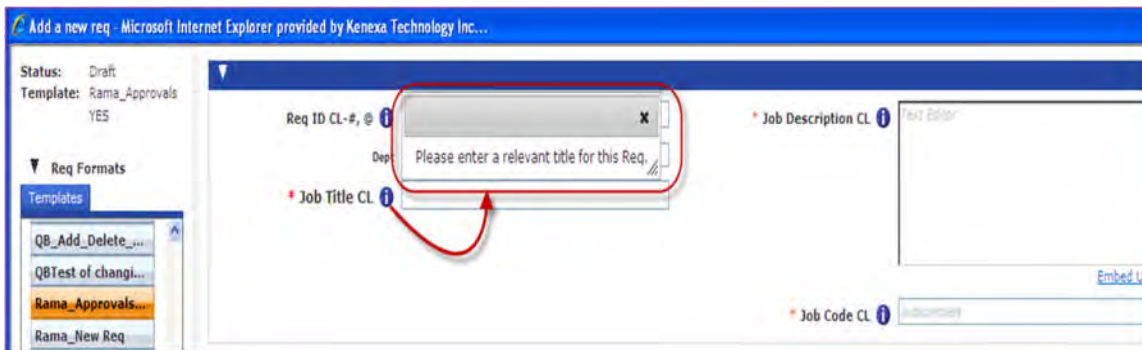
Microsoft Internet Explorer version 7 is not recommended for right- to-left language users; you should use Internet Explorer version 8 higher.

### How Do Clients Get this Feature?

The existing Workbench configuration for classic layout now applies for extended layout reqs, and is available automatically for clients using Arabic or Hebrew locale (clients with purchased Arabic or Hebrew language):

### Field Help Text for Add/Edit Req (Enhanced Layout)

When field level help text is configured for a field within a Req template, an information icon (i) displays for the field in Add and Edit modes only. Clicking the icon opens the field help text dialog box. (If users can see the field, they can view the help; no additional privileges are required.)



When help text is configured for any Req field, it is displayed only in the Req forms that use the enhanced layout.

Users can move the help text dialog box around the page and close it when no longer needed.

- If still open when the form is saved, canceled, or closed, the dialog will close
- If another help text icon is clicked, the previous help text dialog will close.

### How Do Clients Get this Feature?

This feature is available only for Enhanced Layout req forms. Additional configuration in Workbench is needed, which can be performed by the Kenexa Support Team or certified Workbench Self-Service users. Configuration is described in the [Workbench Self-Service Certified Users](#) section.

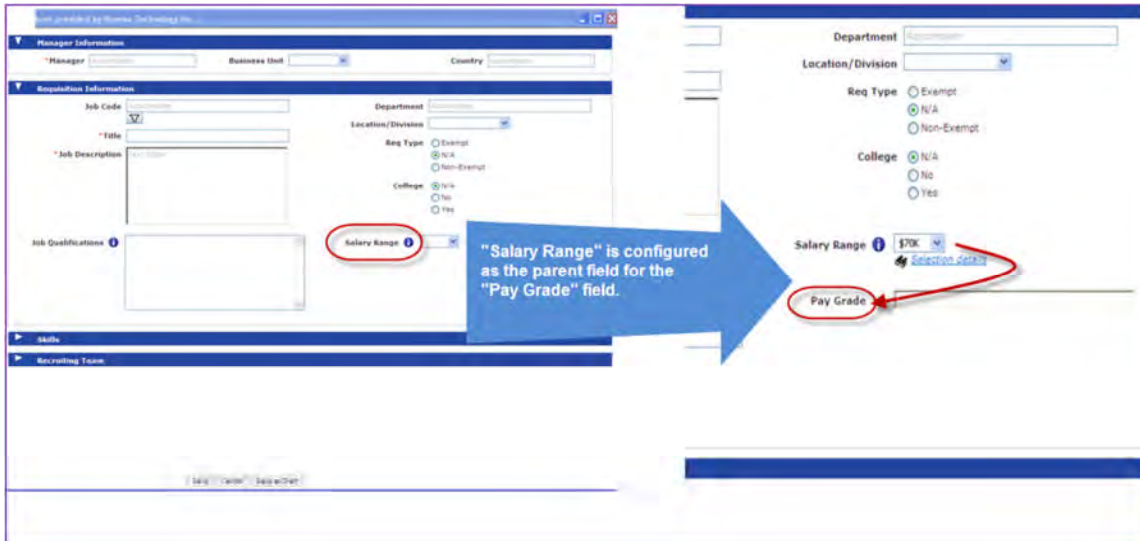
### Question Branching for Add/ Edit/ View Req

Req fields can have an attribute that hides the field until another field on the same Req has a certain value selected when adding or editing a req. Selection of the “parent” option triggers child field(s) to appear wherever configured in the layout. This includes triggering:

- child fields to appear within a collapsed section
- an entire section to appear (when the section consists of children only).

For example, in the following figure, Salary Range is the parent field for Pay Grade. Once the user supplies a salary value, the Pay Grade field appears.





### How Do Clients Get this Feature?

This feature is available only for Enhanced Layout req forms. Additional configuration in Workbench is needed, which can be performed by the Kenexa Support Team or certified Workbench Self-Service users. Configuration is described in the [Workbench Self-Service Certified Users](#) section.

### How Do Clients Get this Feature?

Most of the Phase 2 enhancements require no additional configuration, since they are already supported by Classic eq layout and are now also supported by Enhanced layout. For these features, the existing Workbench configuration applies and has been summarized with each feature.

- [Embedding of URLs](#) in Job Description
- Edit Req - support for client setting to [“Display inactive options”](#)
- [Req Approvals](#) - Addendum forms for Declined or approved statuses; abridged view (will display in classic layout); SmartApproval workflow during approval
- [“JCDD defaults on Req edit”](#) honors multi-language workflow
- [Secure Req watermark](#) on view and edit
- [Interview Builder integration](#) support
- [Validation of optional requisition ID](#)
- [Right-to-left support](#) for Arabic and Hebrew users

Additional configuration in Workbench is needed for two new features that *are supported only by the Enhanced layout* for req templates:

- [Help at Req field level configuration](#)
- [Question branching configuration](#)

Please contact your Kenexa Support Team or Certified Workbench User for assistance or more information.

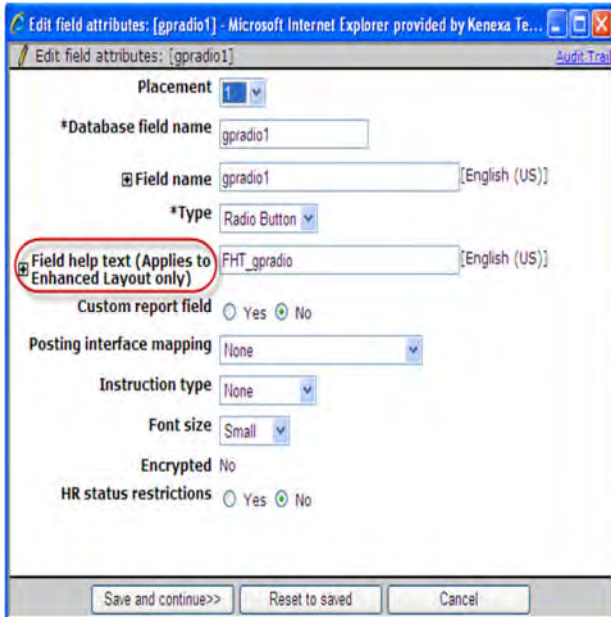
## Workbench Self-Service Certified Users

### Field Level Help (Enhanced Layout Only)

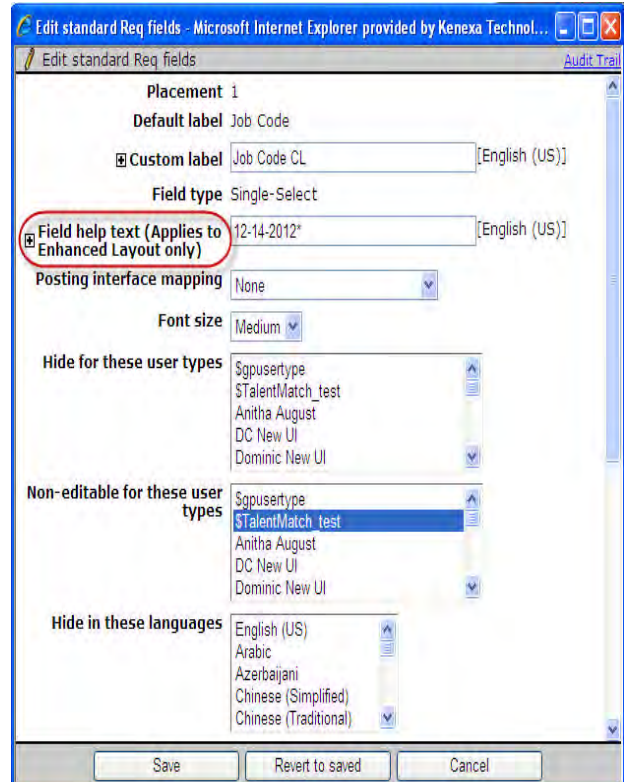
A new field attribute **“Field help text (Applies to Enhanced Layout only)”** is available for all custom and standard req fields.

**Tools > Forms > Reqs > Req Forms > Define standard req fields > Edit field attributes** [for selected field]  
 –OR–  
**Tools > Forms > Reqs > Req Forms > Define custom req fields > Define new req field/ Edit field attributes** [for selected field]

Custom Req field attributes



Standard Req field attributes



- If there is data saved in a field's "Help text field" attribute, an icon displays to the right of the field label when the field is viewed in 2xB Add req or Edit req modes.
- Maximum allowed characters is 4000, and text supports HTML (including formatting and links).
- A plus (+) sign will expand to list all purchased locales for the client.
- Field help text is added to this field on all associated Req templates; variances can be configured at the individual Req template level.
- Field attribute also appears on the "Edit field attributes" page at the Req template level to configures specific field level help at the template level (**Tools > Forms > Reqs > Req Forms > Administer req fields** [for selected req form > **Edit field attributes** [for any selected field]]).

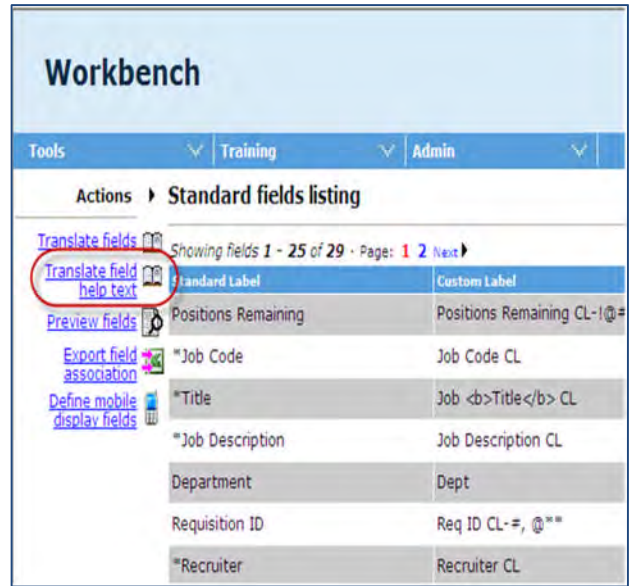
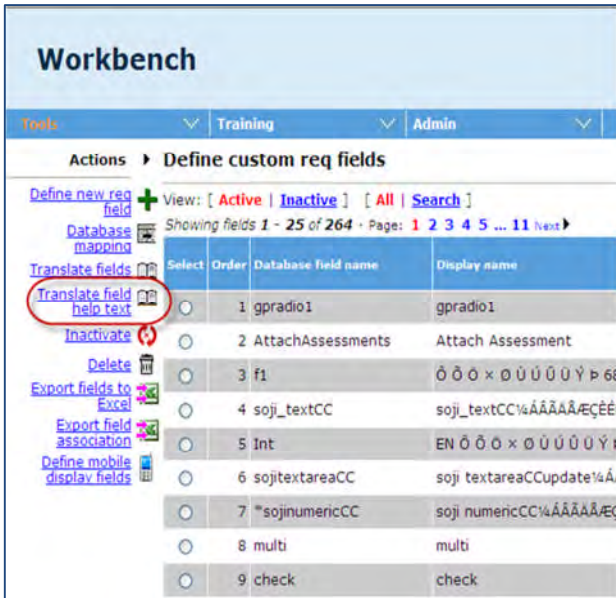
**Translate Field Help Text**

A new action item "**Translate field help text**" appears on the list pages of custom and standard req fields.

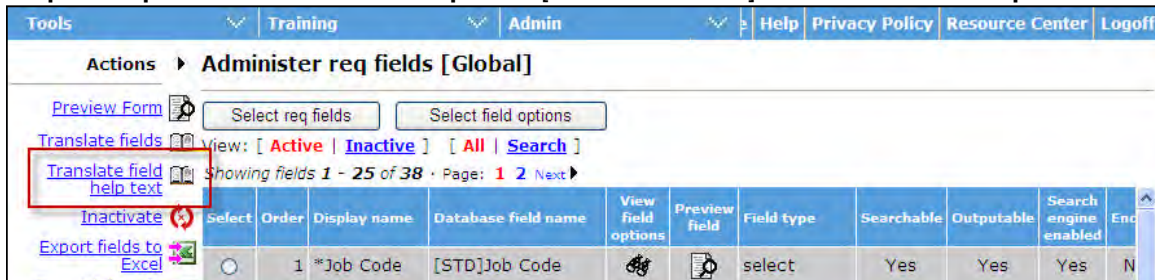
**Tools > Forms > Reqs > Req Forms > Define custom req fields > Translate field help text** [for selected field]  
 –OR–  
**Tools > Forms > Reqs > Req Forms > Define standard Req Fields > Translate field help text** [for selected field]

Custom Req fields

Standard Req fields

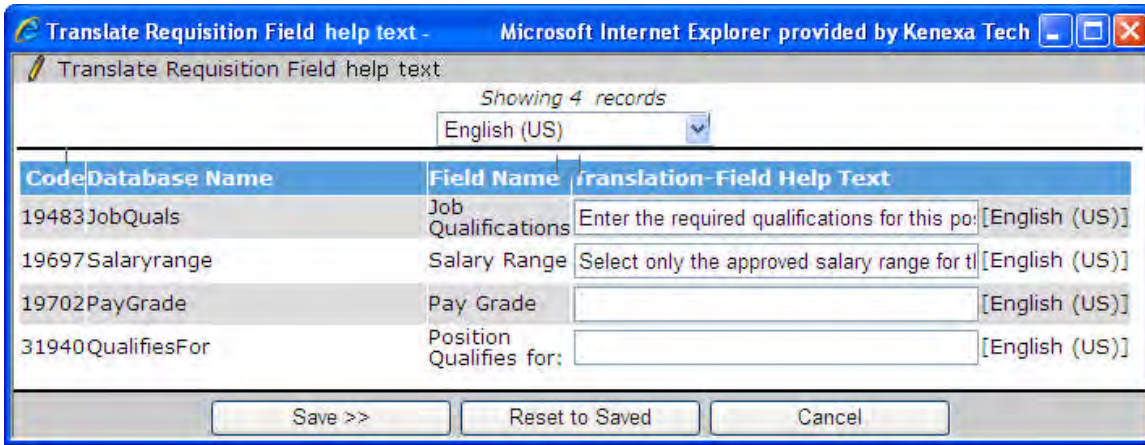


- Action item allows users to enter or edit all field help text values for all fields, in all purchased locales, in a single screen.
- New action item also appears on the “Administer Req fields” page at the template level (**Tools > Forms > Reqs > Req Forms > Administer req fields [for selected form] > Translate field help text**).



Only the custom fields from the template display on this page, so it is the same page that is launched for the Custom Req field workflow except it shows only the custom fields that are assigned to that template.

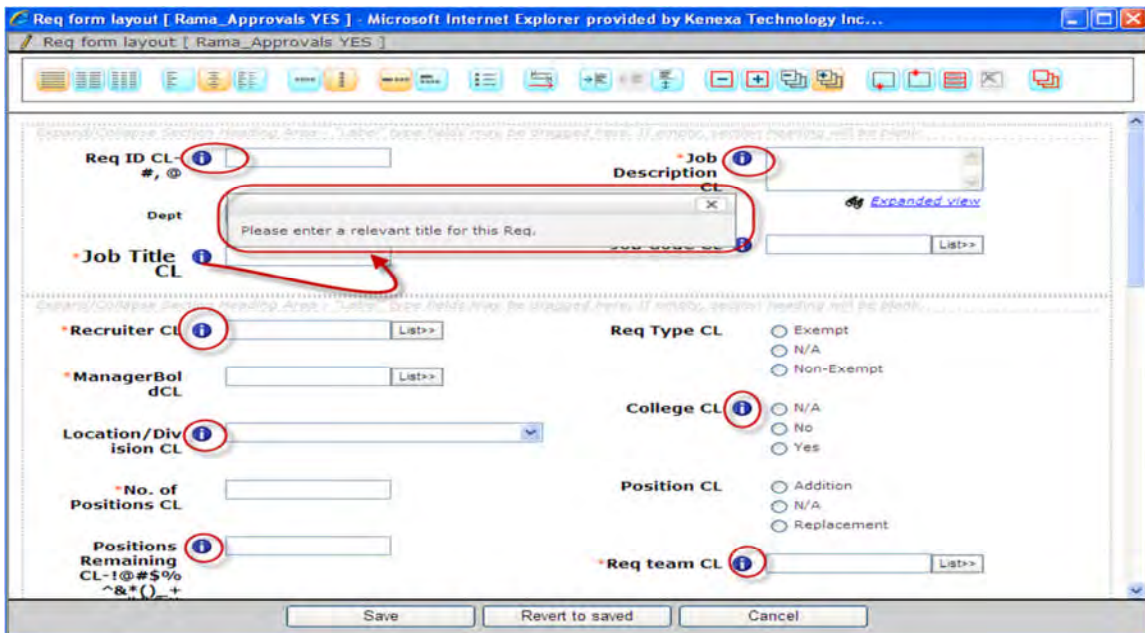
The **Translate field help text** action launches the **Translate Requisition Field help text** screen, as shown in the following figure (or launches the similar Translate Requisition Standard Fields help text window when launched for the standard fields workflow). The screen is similar to the exiting Translate fields window, and you enter translations in the same manner.



### Field Level Help for Req Fields on Layout Manager

If help text is configured for a field in the locale being viewed, an icon is also displayed at the field within the Layout Manager. Users can click to display help text.

**Tools > Forms > Reqs > Req Forms > Form layout icon [for selected form]**



To see field help text dialog box, you can click the icon.

### Question Branching (Enhanced Layout Only)

A new attribute called **Question Branching** is available on the "Edit field attributes" page for standard and custom req fields, at the Req Template level only. Question branching is only supported on the Enhanced Layout Req forms and not on the classic layout.

1. Navigate to **Tools > Reqs > Req forms > Administer req fields** [for selected **Enhanced** layout form]> **Edit field attributes**.

**Edit field attributes: [PercentTravel]** - Microsoft Internet Explorer provided by Kenexa Technolo... Audit Trail

**Non-editable for these user types**  **Extend to add req**

- HR Staff
- Recruiter
- Hiring Manager
- QuickStart User
- JAC

**Required for these user types**

- HR Staff
- Recruiter
- Hiring Manager
- QuickStart User
- JAC

**Hide in these languages**

- English (US)
- Chinese (Simplified)
- Czech
- Danish

**Required in these languages**

- English (US)
- Chinese (Simplified)
- Czech
- Danish

**Question Branching:**  Yes  No

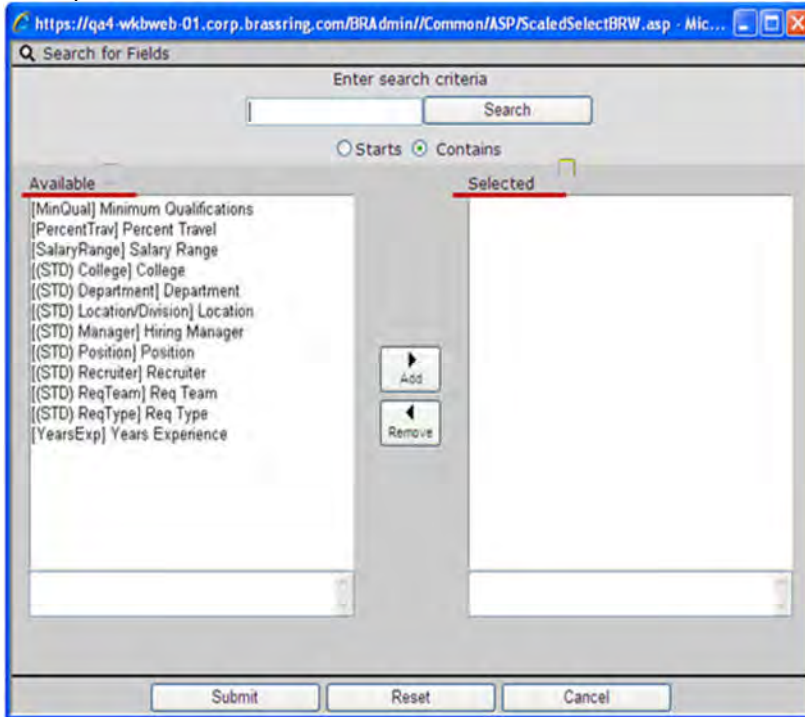
**Show question when field response is:**

**Database field name:**

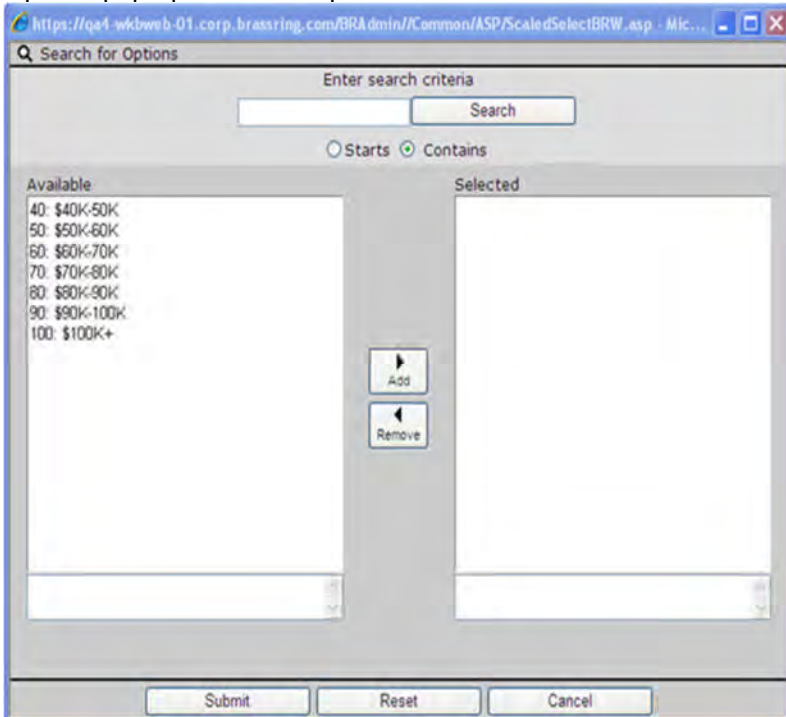
**Selected value(s):**

2. The default value for “Question branching” is “No;” as long as it is “No”, the two “Select” buttons below remain inactivated.  
Select “Yes,” and select a “**Database field name.**” The Search for fields screen opens, displaying the fields

with options.



3. Select one option from the “Available” list and **Submit**.
4. Click “Select” for “Selected value(s)” to select one or more desired branching responses on the Search for Options pop-up. All active options for the field selected in “Database field name” are available.



5. Click Submit, and Save the field attributes.

### “Parent” Fields (in the available list for “Show question when field response is”)

All active ‘optionable’ custom req fields on current Req template appear, including:

- Single-select
- Multi-select
- Check box
- Radio button
- Fields that have Pull options from list of specific codes, states, countries, options from other form field BUT NOT Pull options from list of all recruiters, all managers, all active Enterprise users, all active users, all reqs, all open reqs, all pending reqs.

Only the following Standard Fields:

- Job Code (if single select)
- Department
- Recruiter
- Manager
- Location/Division
- Req Type
- College
- Position
- Req Team

### Fields Excluded from Question Branching

The following standard Req fields do not have the attribute (cannot be children), since they can never be hidden on a Req form:

- |                    |  |
|--------------------|--|
| • Job Code         | • Approval routing                           |
| • Title            | • Keyword (Never shows on UI)                |
| • Job Description  | • DateReqPosted (Never shows on UI)          |
| • Recruiter        | • CNPDelivery (Never shows on UI)            |
| • Manager          | • AutoReqID (will always show in left pane)  |
| • No. of Positions | • Add Type (additional business rules apply) |
| • Requisition Team |  |

The Question Branching attribute will not be added in any other areas such as Req sub forms or Addendum forms.

# Reqs – Evergreen Reqs via JCDD and Req Imports

Both req import and JCDD import now support the creation of indefinitely-posted Evergreen Reqs.

<b>Product</b> RDP 690 Release 13.3	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Imports – Req and JCDD
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Specific conditions required – see details below.	

## Feature Description

Evergreen Reqs remain posted indefinitely, always accepting applicants for positions with high turn-over. To support the creation of Evergreen Reqs via import, both req import and JCDD import can now accept a double dash (- -) in the “Days to remain posted” field.

At the time of import, the system checks for certain conditions:

- For any req with a “- -” value for “Days to remain posted” field, checks whether the **Evergreen Requisition** custom req field is set to “Yes” in the import. Either “- -” (hyphen space hyphen) or “--” (hyphen hyphen) will pass validation.



Enabling the **Evergreen Req** client setting automatically creates the custom req field, **Evergreen Requisition**. Previously a checkbox field, the Evergreen Requisition field is now a Yes/No single-select. It can be added to all req forms from which Evergreen Reqs can be created to indicate a specific req is to be treated as an evergreen req (No is the default). The field becomes read-only for all users.

The system shows a warning message if a user tries to import “Days to remain posted” as “- -” without meeting this condition. Per standard functionality, the validation will be based on the option description, unless the client has configured to validate on code.

- STATUS must be Active; for XML this is "A", for Microsoft Excel this is "Active"

System imports any reqs in the import file that do pass all validations.

This enhancement applies to both XML imports and Excel imports via Workbench:

- Job Code Default Data (JCDD) – XML import (Tools > Integration > Integration tools)
- JCDD Posting Defaults – XML import (Tools > Integration > Integration tools)
- Req – XML import (Tools > Integration > Integration tools)
- JCDD Posting Defaults – Excel import (Tools > Import > Profiles)

Note: The “Profile” import is not wholesale “JCDD import” – it is just the posting defaults portion.

## How Do Clients Get this Feature?

This feature requires that the **Evergreen Req** client setting be enabled, and the imports have the values set as defined in the preceding feature description. Please contact your Kenexa Support Team for more information about enabling this feature.



# Rules Automation Manager – Internal Feature Enhancements

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Release 13.3 RAM Phase 6 contains additional automated functionality to further streamline the hiring process and allow more efficient configuration and troubleshooting. Users are now prevented from configuring req edit triggers and candidate form update triggers that can run in an infinite loop. Other key features provide the ability to:

- Trigger candidate export integrations from HR status update (new client setting)
- Delete previous trigger versions (new option)
- Search logs more effectively (new search criteria)
- Configure mappings for WOTC & Social Source via new action category, Preconfigured Integration
- Exit the trigger via new action category, Exit

Key features of Phase 7 include:

- Rerun available from within RAM/AM logs. Multiple records can be rerun using a single click.
- Actions available to Run Another [trigger] Instance or Run Another Trigger.
- Ability to run up to five additional instances of a trigger based on a date field or after a specific interval.

<b>Product</b> LDP015 Rel 13.3	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Workbench Internal
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Rules Automation is configured by Kenexa staff	

RAM requires the restricted client setting to be turned on.

The *RAM User Guide* contains material to guide staff on the creation and maintenance of Rules Automation Manager (RAM) triggers in Workbench.

**Enablement presentations** for Phases 6 and 7 are posted *internally* on the Release 13.3 Launch site.

[http://www.kenexanet.com/sites/plp/2xB13\\_3/Shared%20Documents/Forms/AllItems.aspx?RootFolder=%2fsites%2fplp%2f2xB13%5f3%2fShared%20Documents%2f13%2e3%20Enablement%20Slides&FolderCTID=&View=%7b5C45B988%2dE6A4%2d4533%2dB607%2dA056DCE56937%7d](http://www.kenexanet.com/sites/plp/2xB13_3/Shared%20Documents/Forms/AllItems.aspx?RootFolder=%2fsites%2fplp%2f2xB13%5f3%2fShared%20Documents%2f13%2e3%20Enablement%20Slides&FolderCTID=&View=%7b5C45B988%2dE6A4%2d4533%2dB607%2dA056DCE56937%7d)

# Rules Automation Manager – Posting Forms to Candidate Portal

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A new Rules Automation Manager (RAM) trigger action, Post to Candidate Portal, initiates and completes the posting of candidate forms to the candidate portal.

<b>Product</b> LDP 145 Release 13.3	<input checked="" type="checkbox"/> 2x BrassRing <input checked="" type="checkbox"/> Talent Gateways	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.	

## Feature Description

This feature introduces a new RAM trigger action, Post to Candidate Portal that uses a candidate's HR status trigger to initiate and complete the posting of candidate forms to a candidate portal.

When a candidate's HR status reaches the Post to Candidate Portal's pre-defined trigger HR status, RAM automatically posts candidate forms, selected during trigger configuration, to the candidate's portal.

The target users are clients who want candidate forms to post automatically when a candidate's HR status reaches a specified HR status, and candidates who access the Candidate Portal.

## Candidate Experience

Candidates can now access candidate forms automatically posted to their candidate portals.

## How Do Clients Get this Feature?

This feature is controlled by a new RAM trigger action, Post to Candidate Portal. The Kenexa Support Team must configure the RAM trigger. Please contact your Kenexa Support Team for more information.

# Kenexa Tasks

The RAM trigger used to initiate and execute the Candidate Portal Posting workflow for individual candidates relies on updates to the existing “HR Status” triggering mechanism. Use the following procedure to configure a RAM trigger to post candidate forms to a candidate portal.

## Workbench

A new system status is available under RAM’s existing triggering mechanism of “HR Status” (no changes are required to the screen below).

To configure the RAM trigger:

1. **Tools > Automation Manager > Admin > Add New RAM Trigger.**
2. Complete the Trigger name field and select the radio button for **RAM Trigger type.**
3. Click **Save and Continue.**
4. Complete the following fields on the RAM screen:

**Rules Automation Manager**

\* **Trigger Name:** CandPortPostingTrigger

\* **Triggering Mechanism:** HR Status

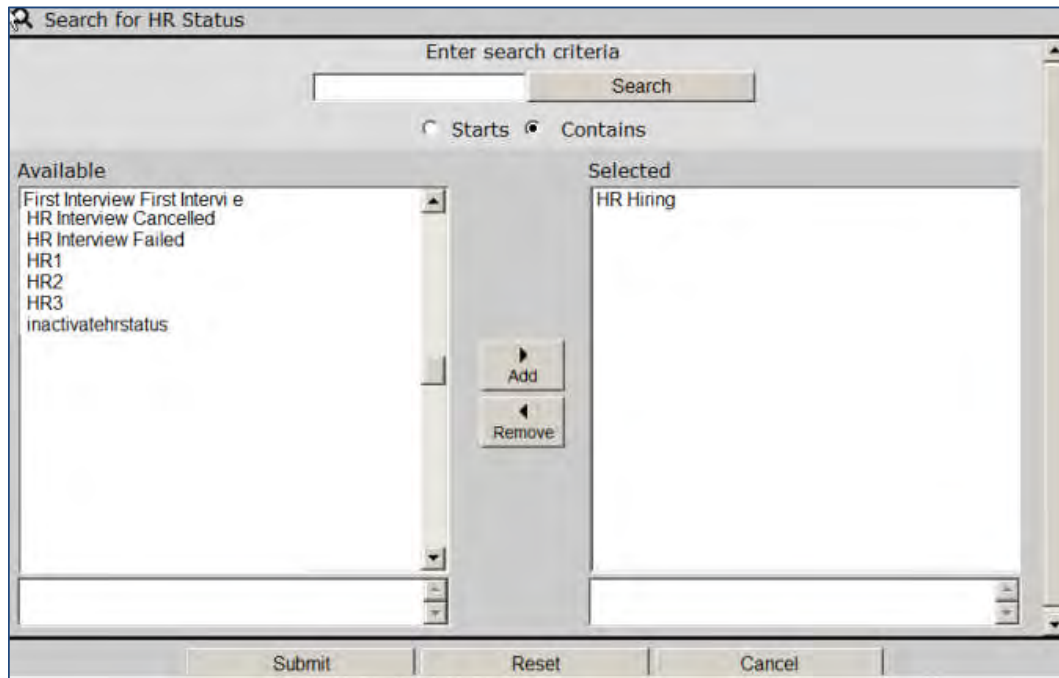
\* **Select Trigger Event:** Selected (0) **List >>**

\* **Trigger Delay (hrs):** 0

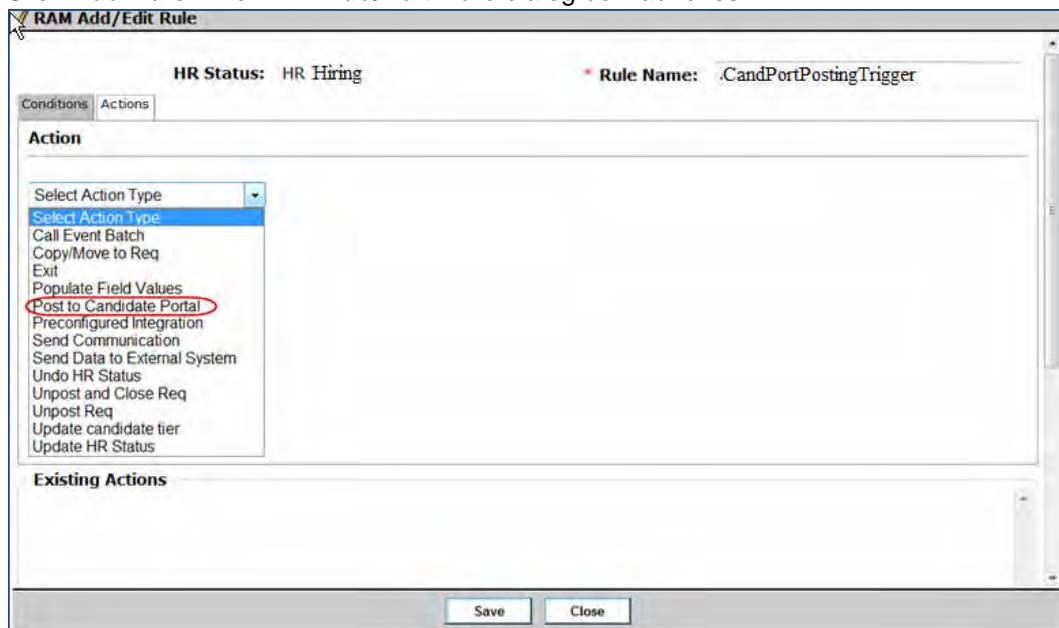
**Trigger Context:** NA

**Save** **Close**

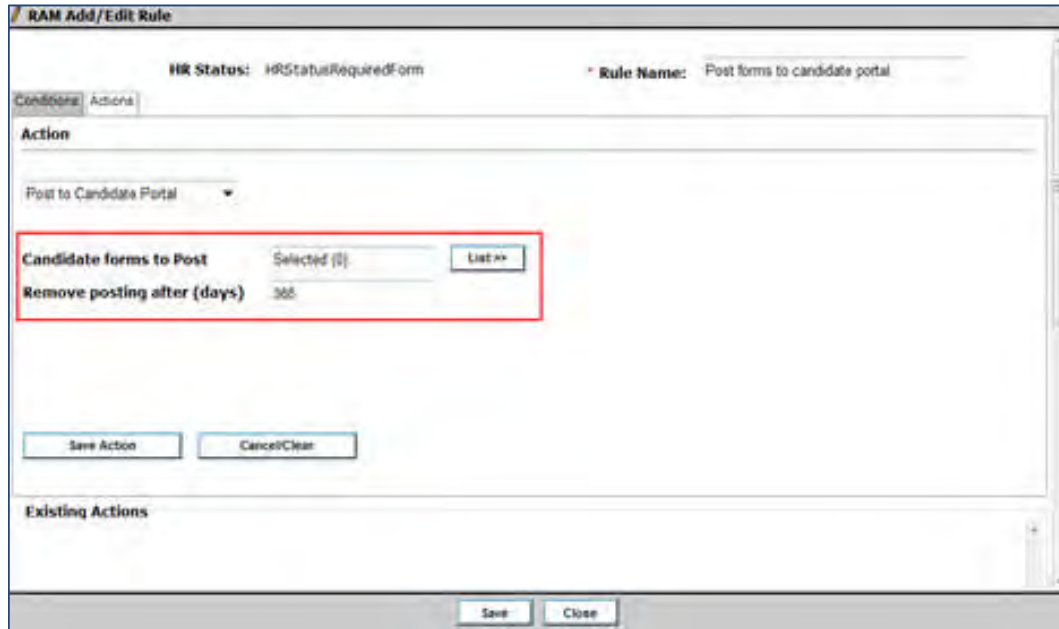
- Trigger Name
- Triggering Mechanism – select **HR Status**
- Trigger Delay
- Trigger Context
- Select Trigger Event – Click **List** and select an HR Status for the triggering event, then click **Submit.**



5. Click **Save**.
6. Click **Add Rule**. The RAM **Add/Edit Rule** dialog box launches.



7. Select the **Actions** tab, click the drop-down Action menu, and select **Post to Candidate Portal** action, then click **Save**. The screen refreshes with Candidate Forms to Post fields.



8. Click **List** to select a candidate form to post.

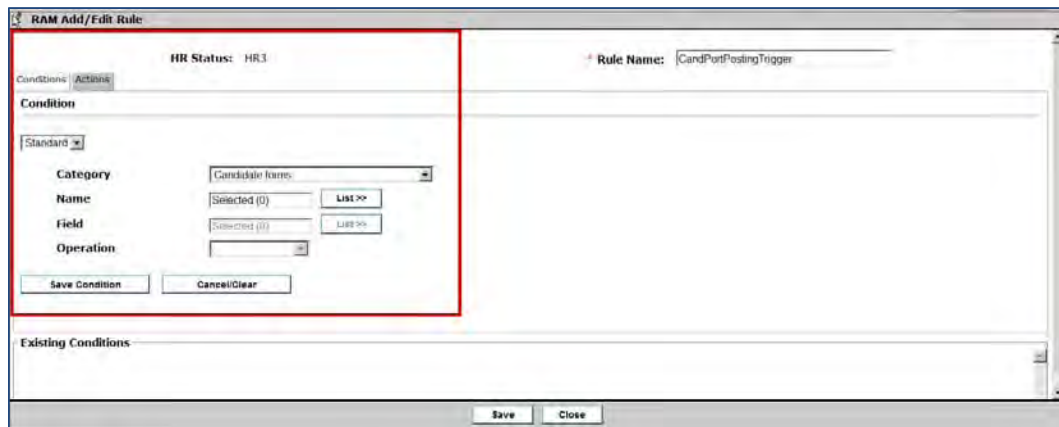
After performing the search and making selections, you see the term “Selected (#)” in the text field for “Candidate forms to Post.”

9. (Optional) Select a “Posting Removal Date.” It follows the same business rules as for the manual flow for Post to Candidate Portal. If a date is configured, it applies to all the selected forms.

10. Click **Save Action**.

11. Click the **Conditions** Tab and Complete the following fields:

- Category
- Name
- Field
- Operation



12. Click **Save Condition**.

13. Click **Save**.

## Trigger Behavior

When:

- trigger criteria are met  
AND
- candidate's HR status reaches RAM condition of "HR Hiring  
AND
- rule requirements are met  
THEN

the candidate form is selected and posted to the candidate's portal.

## RAM Log

Posting Failures:

- If posting fails, failure is added to the RAM/AM log.
- Clients must periodically look at the RAM/AM log files to see where posting to the Candidate Portal via RAM triggers failed
- There are no retries.
- There is no manual intervention.

# System Support – Browsers and Languages

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## Browser/OS Support

Whenever you need the most up-to-date information on supported platforms and browsers, please see the Browser/OS Support document on the User Resource Center.

## Language Support

Whenever you need the most up-to-date list of supported languages, please see the Language Support document on the User Resource Center.

Support for the following languages was added in Release 13.3 for Talent Gateways.

- Bulgarian (Project LDP 154)

# Talent Gateways – Candidate Self-Service Login Management

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This feature provides a username-retrieval process for candidates who have forgotten the login user name on their Talent Gateway accounts, and makes more security question choices available.

<b>Product</b>	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Talent Gateways
<b>LDP 141 Release 13.3</b>	<input checked="" type="checkbox"/> Workbench Self-Service	
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.	

## Feature Description

Candidates are frequently unable to access their Talent Gateway accounts because they cannot complete the password-reset process. Two main reasons for this are that password-reset email is sent to a forgotten or obsolete email address, or the user has forgotten his or her user name. Previously there was no user name retrieval process. A new **Enhanced self-service login management** option for the client setting “TG login details management” addresses this. Using the option improves login security and information recovery, with enhancements in these areas:

- Account creation – Two additional security questions required (for a total of three questions).
- Forgot my username – New link and new workflow with new pages.
- Forgot my password – “Forgot my username” link added to workflow, also two additional security questions.
- Security questions – Additional security questions added, for a choice of ten (10) when security questions are enabled for 2xB, Agency Manager, and Talent Gateways.
- Failure messaging – Pop-up message configurable with client’s text.

## Security Questions

When the **Enhanced self-service login management** option is selected, candidates creating new TG logins must select three (3) security questions instead of one (1), and enter three (3) answers. Candidates select or answer security questions in the following workflows:

- Creating a new TG account – “Create login” page
- Accessing an existing account
- When changing one’s own security questions
- When resetting a password in the “Forgot my password” flow
- When attempting to retrieve the username in the new “Forgot my username” flow.

## Candidate Experience

The following describes changes in the candidate experience when the new client setting: “TG login details management” is set to “Enhanced self-service login management.”

### Creating Login

Candidates will:

- See additional security questions when creating or resetting a password.
- Be required to select three (3) security questions instead of one (1).



Home     Create login    [? Help](#)

## Create login

Enter your username and choose a password which will enable you to log in and access your information in the future. If you have an e-mail address, we recommend using it for your username. Select security question(s) and enter your answer(s). This information will be used to authenticate your identity in case you forget your password or your username.

Username   
 Password  [Password security tips](#)  
 Re-enter password   
 Select a security question    
 Answer to your security question   
 Select a security question    
 Answer to your security question   
 Select a security question    
 Answer to your security question

Note that the default text at the top of the page reflects the fact that candidates are selecting multiple security questions. This text can also be customized for your account.

The answers that candidates supply per question can be up to 50 characters (existing functionality).

### Accessing Existing Account

Candidates who already have profiles when the new “Enhanced self-service login management” option is enabled will be asked to select three different security questions when they next log in.

The “Security questions” page launches, with a pop-up window displaying, “Please add security questions and answers.” The candidate clicks OK to close the message window, and must select three new questions. (Old question is discarded).

Security questions - Microsoft Internet Explorer provided by Kenexa Technology Inc...

## Security questions

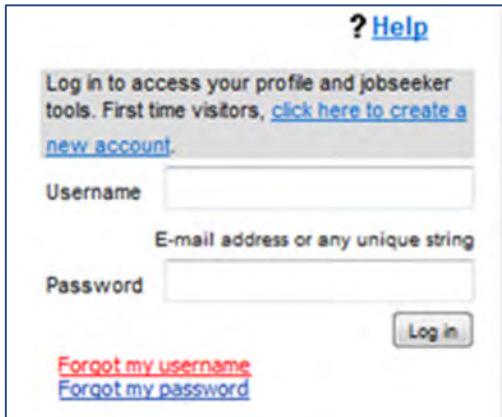
[? Help](#)

Please select three security questions and provide the answer to each question.

Select a security question:    
 Answer to your security question:   
 Select a security question:    
 Answer to your security question:   
 Select a security question:    
 Answer to your security question:

## Forgot My Username

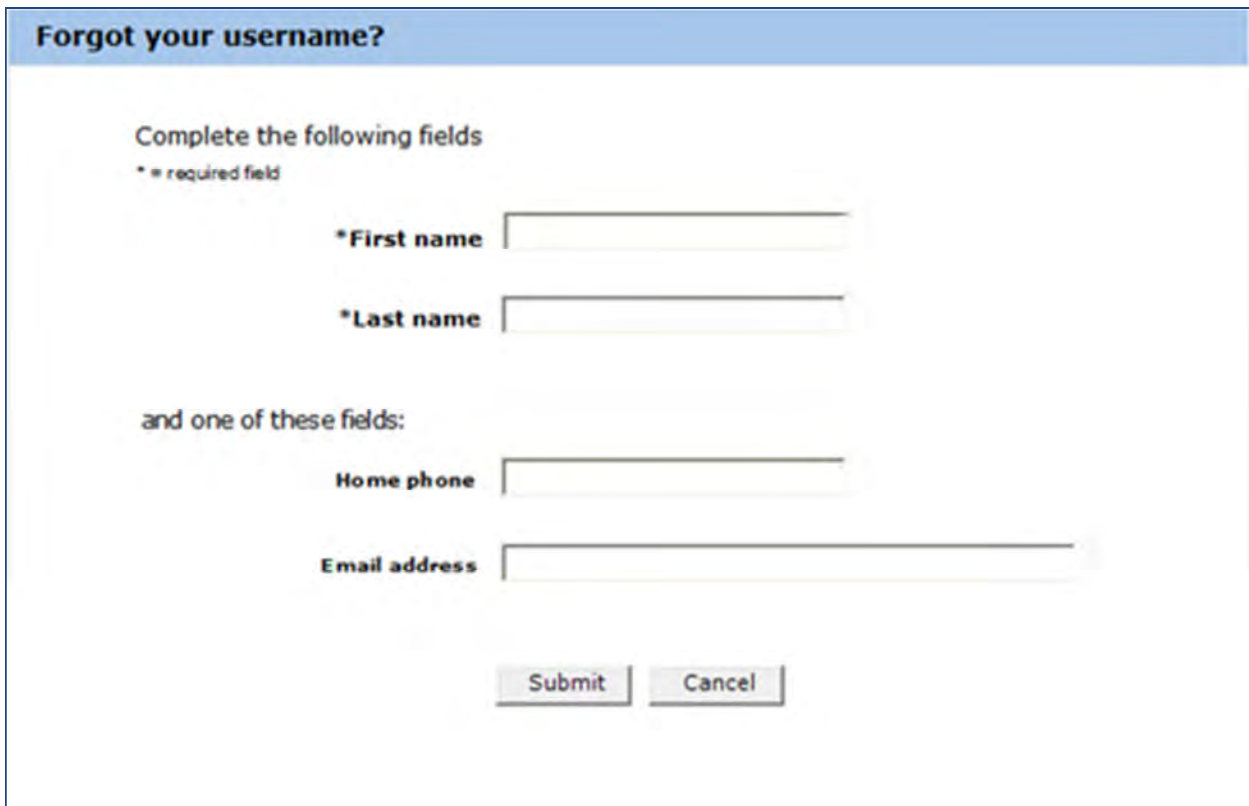
When the new “Enhanced self-service login management” option is enabled, candidates can use a new “Forgot my username” workflow on the Talent Gateway login page, as well as from within the “Forgot my password” workflow on the username page in that workflow.



The screenshot shows a login form with the following elements:

- A [? Help](#) link at the top right.
- A grey box containing the text: "Log in to access your profile and jobseeker tools. First time visitors, [click here to create a new account.](#)"
- A "Username" input field with a placeholder "E-mail address or any unique string".
- A "Password" input field.
- A "Log in" button.
- Two links at the bottom: [Forgot my username](#) (highlighted in red) and [Forgot my password](#).

Clicking **Forgot my username** opens the pop-up.



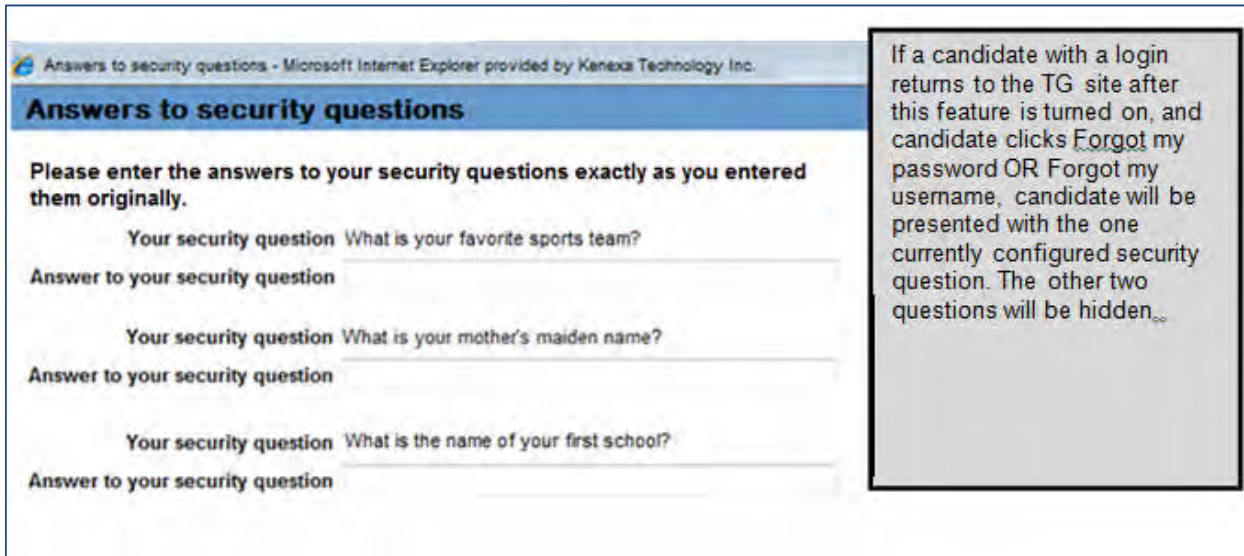
The pop-up form is titled "Forgot your username?" and contains the following fields:

- A heading: "Complete the following fields"
- A note: "\* = required field"
- Required fields: **\*First name** and **\*Last name**.
- A heading: "and one of these fields:"
- Optional fields: **Home phone** and **Email address**.
- Buttons: "Submit" and "Cancel".




For multiple matches of the first and last name combination, the system checks the phone or email to narrow it down. In case of multiple matches, candidates will be directed to complete the fourth entry as well. If multiple matches still result, candidate will see the message, “Username retrieval unsuccessful.”

The “**Answers to security questions**” page pops up after the user clicks “Submit” successfully on the “Forgot your username?” page.

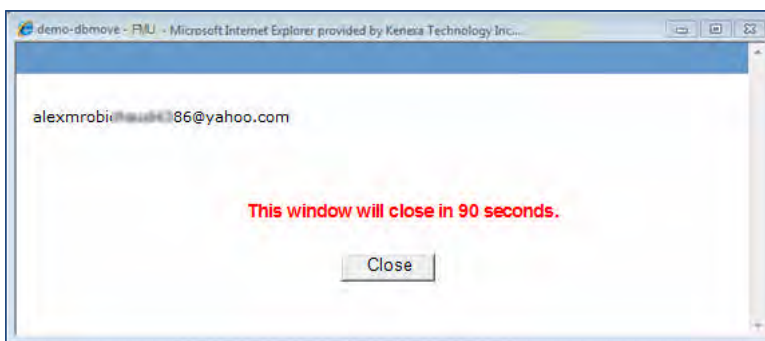


- If the candidate has already configured three security questions and answers, the candidate *must answer all three correctly* for the username to be displayed.
- If candidate has a login to the TG but has not previously selected three (3) security questions, the candidate is presented with one (1) security question to retrieve the username, the first time only. After successfully logging in, the candidate is presented with the updated “Security questions” page to pick three new security questions in order to reach other pages on the TG.

 On the first time coming back to the TG after this feature is enabled, candidates who already have an account who click *either* “Forgot my password” or “Forgot my username” will be able to complete either workflow by answering their existing one security question. Once they log in successfully, the Security questions page launched and they are directed to select three new security questions.

### Right Answers

When the candidate clicks **Submit**, the FMU window pops up if the data matches the stored data. The window displays the username that matches the submitted information for 90 seconds, then closes automatically (can click Close to close manually).



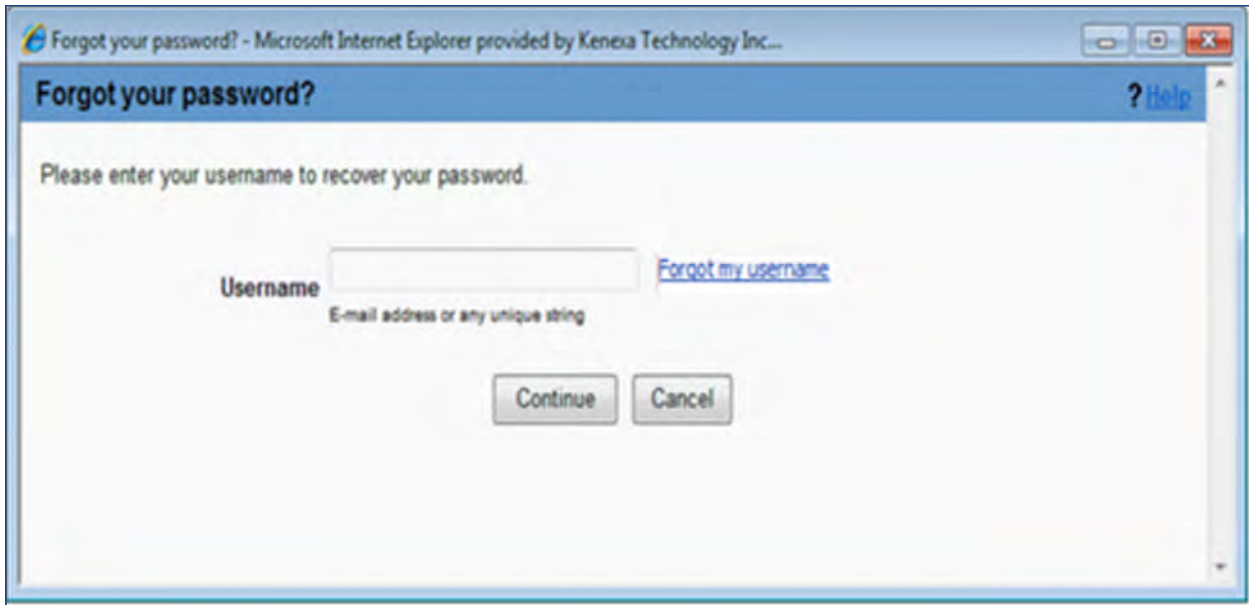
### Wrong Answers

If submitted answers do not match in their entirety the first and second times, the following error message is raised: “Please try again.”

If the third submission also fails, the message configured for your “Username retrieval unsuccessful message” TG text customization setting displays to the candidate.

## Forgot My Password

When a candidate clicks the Forgot my password link on the login page, they go to the Forgot your password? Page, which also includes the new Forgot my username link.



- If the candidate enters his or her username and clicks **Continue**, the only change in workflow is that the the “Answers to security questions” window displays three security questions if they were selected previously. If not, after successfully answering and resetting the password, candidate is asked to select three.
- If candidate clicks **Forgot my username** on this screen, the workflow is the same as described in the preceding section; after successfully retrieving the username, candidate can re-enter the Forgot my password workflow from the login page, supplying Username and clicking Continue when he or she gets to the screen shown above.

## Limitations and Known Issues

If self-service username retrieval/password reset fails for any reason, clients still contact their Kenexa Support Team to enter a Hive ticket and get assistance from the Kenexa Help desk.

## How Do Clients Get this Feature?

This feature, implemented only for *WCAG Talent Gateways*, is controlled by a option for the client setting, **TG login details management**. The option is **Enhanced self-service login managemen** . Please contact your Kenexa Support Team for more information about enabling this feature.

When the new client setting is enabled, clients can also customize a TG text message to display in case of username recovery failure. Contact your Kenexa Support Team or Certified Workbench User for help with this.



At this time, *it is not recommended* to enable Enhanced self-service login management if any of your Talent Gateways are enabled for mobile optimization. To ensure proper security, the Forgot Username feature requires that candidates have three (3) security questions configured, but the mobile apply flow currently only requires one (1) security question, and the flow to add security questions to existing accounts is not yet mobile-optimized.

Planned future support (expected late 2013-early 2014) within the mobile apply flow, when Enhanced Self Service Login Management is enabled, includes:

- Mobile registration page, where candidates create new Talent Gateway accounts during a mobile apply, will require candidates to configure 3 security questions
- When existing candidates, who only have 1 security question configured, log into their account through mobile apply, they will be required to save 3 security questions to their account through a new mobile-optimized page
- Forgot Username hyperlink will be available on the mobile login page. Like the existing Forgot Password hyperlink, the new Forgot Username link will launch the standard Forgot Username flow using the existing pages that are not mobile-optimized.

## Workbench Self-Service Certified Users

The following TG text customization, when the new client setting is set to the “Enhanced self-service login management” option, can be done by users with Workbench Self-Service Certification (Tier 5 or above) or by your Kenexa Support Team.

### Username retrieval unsuccessful message

You can customize text for notifying candidates of what to do in the event they cannot retrieve their user name. Consider how you want username retrieval failure to be handled, and configure the message with the additional information that helps candidates follow your process. For example, you might want to provide contact information for candidates to ask for assistance in retrieving their username or resetting their password.

**Tools > Talent Gateways > Text customization** link [for selected TG] > **Notifications** tab > **Username retrieval unsuccessful message**

The screenshot shows a configuration interface for text messages. It includes three sections:

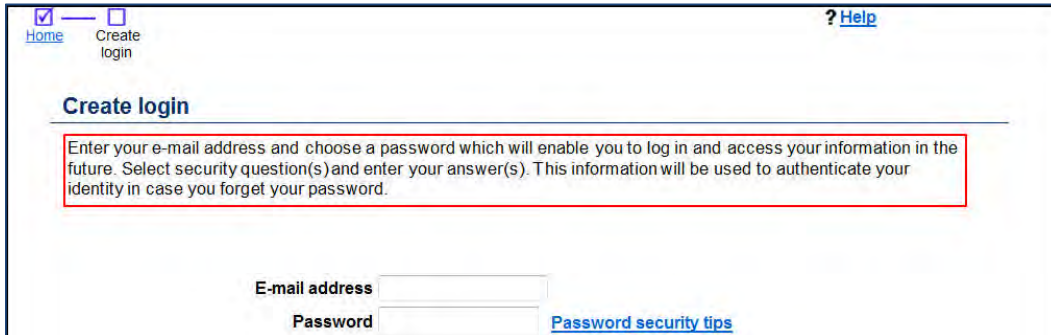
- Password change confirmation message:** A text area containing the message: "Your password for the [clientname] career site has been changed.<br>We are sending you this notice for your protection.<br><br>Date of password change: [date] (Eastern US)<br><br>Please do not reply to this e-". A "Reset to default" button is located to the left.
- Username retrieval unsuccessful message:** A text area containing the message: "Your attempt to retrieve your username was unsuccessful.". A "Reset to default" button is located to the left. A "Show me" link is located to the right.
- SSO log out confirmation message:** A text area containing the message: "You have been logged out of this site.". A "Reset to default" button is located to the left.

Default text is “Your attempts to retrieve your username were unsuccessful.”  
Message displays to candidate when:

- On the “**Forgot your username?**” page, and data submitted does not successfully retrieve one candidate with one or multiple TG profiles. Candidate is locked out permanently.
- Candidate clicks **Submit** for the third time on the “**Answers to security questions**” page, and data entered does not match all three Security answers. Candidate is locked out permanently.

## Create login intro text

A username can be of two types: email address or a unique login string. The type is determined by the “Talent Gateway login type” client setting, and the username retrieval process is active for both types of usernames. To reflect the possibility of selecting more than one security question when “Enhanced self-service login management” option is in effect, the slightly different default messages for both login types were updated. The following shows the new default text displayed when username must be an email address.



The screenshot shows a web interface for creating a login. At the top left, there are two tabs: 'Home' (selected) and 'Create login'. At the top right, there is a '? Help' link. The main heading is 'Create login'. Below the heading, a red-bordered box contains the following text: 'Enter your e-mail address and choose a password which will enable you to log in and access your information in the future. Select security question(s) and enter your answer(s). This information will be used to authenticate your identity in case you forget your password.' Below this text, there are two input fields: 'E-mail address' and 'Password'. To the right of the 'Password' field is a link for 'Password security tips'.

If your account has customized this text on the Login page, you should update that wording, if necessary.

**Tools > Talent Gateways > Text customization** link [for selected TG] > **Create Login** tab > **Create login intro text**

- Default text when the client setting allows any unique login string is: “Enter your username and choose a password which will enable you to log in and access your information in the future. If you have an e-mail address, we recommend using it for your username. Select security question(s) and enter your answer(s). This information will be used to authenticate your identity in case you forget your password or your username.”
- Default text when the client setting requires an email address as the username is: Enter your e-mail address and choose a password which will enable you to log in and access your information in the future. Select security question(s) and enter your answer(s). This information will be used to authenticate your identity in case you forget your password.

# Kenexa Tasks

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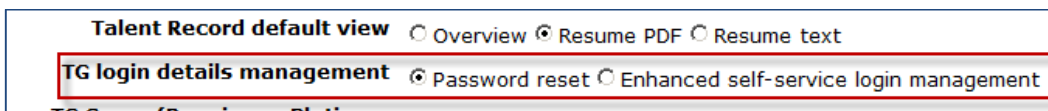
Steps to set up this feature include:

1. Set [TG login details management](#) client setting.
2. Check that [Activate security question\(s\) for ...](#) client settings are set appropriately.
3. Customize text on the TG Notifications tab for the [Username retrieval unsuccessful message](#).
4. Update custom text on the TG Create Login tab for [Create login intro text](#) (if necessary).

## Workbench

### Client setting TG login details management

**WB > Select a client > Edit icon –OR– Admin > Manage Clients > Edit client settings**



Options are:

- **Password reset** - Existing functionality, which includes:
  - 1 security question/answer pair
  - “Forgot my password” link
  - In addition, users will see a longer list of security question options from which to select (list previously presented only 5 questions).
- **Enhanced self-service login management** - New self-service capability for candidates accessing TGs
  - Requires the selection of 3 security question/answer pairs
  - Includes a longer list of security questions
  - Provides a “Forgot my password” link for two candidate workflows
  - Provides “Forgot my username” links on the TG login page (above “Forgot my password”) and on the username page in the “Forgot my password”
  - Allows execution of the “Forgot my username” workflow to retrieve their username to help them log in to the TG again.

### Effect of Turning Off Client Setting

If the client setting is turned from “Enhanced...” to “Reset password” (the default value), the following changes will take place:

- Enhanced functionality associated with “Forgot my username” will no longer be visible.
- New candidate who is trying to create an account will have to select only one security question and answer. He or she will, however, be selecting from a list of ten questions instead of five. (This was a visible change with this project.)
- Returning candidate who already has a login plus three security questions and answers will be presented with only one security question on the “answers” page when in the Forgot my password workflow or any other workflow where the need to answer one or multiple security questions occurs. The other two security question/answer pairs will be hidden.

### Interaction with Other Login-Related Client Settings

The following summarizes how other client settings related to login security interact with **Enhanced self-service login management** workflow.

- Lockout Period Gateway – period candidate is locked out of TG after three failed login attempts. Value for this setting has no effect on this functionality.

- Password Frequency Gateway – value determines how often candidate will be prompted to change his or her password. If the **Enhanced self-service login management** is turned on, candidates will be presented randomly with one security question at password change time (it is three questions for Forgot password or Forgot username workflows).
- Talent Gateway login type – determines the type of string that can be used for the username field when creating an account and subsequently logging in to the TG. Candidates must create usernames in accordance with this setting. **Enhanced self-service login management** workflow respects this setting.
- Talent Gateway password strength – forces users to use more secure combinations of letters, numbers, special characters, mixtures of upper- and lower-casing in passwords. **Enhanced self-service login management** workflow respects this setting.



# Talent Gateways – Cover Letter Upload

Candidates can now upload files for cover letters as they do for their resume/CVs.

<b>Product</b>	<input checked="" type="checkbox"/> 2x BrassRing
<b>LD 108 Release 13.3</b>	<input checked="" type="checkbox"/> Talent Gateways
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.

## Feature Description

Before this feature, candidates were able to type or copy and paste their cover letter in the text area provided on the Talent Gateways. Cover letters thus submitted are received by recruiters or hiring managers in plain text. This was a hindrance to the candidates who wanted to submit their cover letters with formatting for a better appearance.

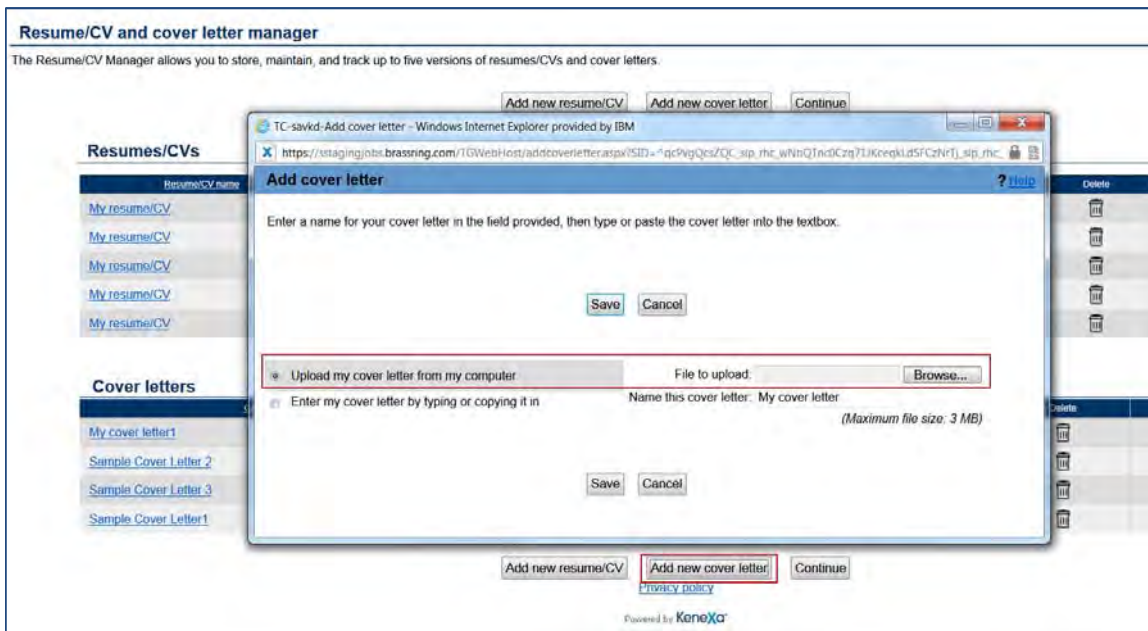
With this feature enabled, candidates can upload a file for a cover letter in one of the formats from the list below:


- .DOC
- .DOCX
- .TXT
- .PDF
- .RTF
- .HTML
- .HTM
- .MHT
- .MHTML

Additionally, candidates can select to use a previously saved (uploaded or typed) cover letter or can choose to type in a new cover letter.

The screenshot shows the 'Submit resume/CV' page. At the top, there is a navigation bar with links: Home, Search openings, Search results, Submit resume/CV, Resume/CV profile information, Submit attachments, Additional Information, and Confirmation. A 'Social networking information' button is also present. Below the navigation bar, there are 'Continue' and 'Back' buttons. The 'Resume/CV' section has three radio button options: 'Use a resume/CV from my profile', 'Upload my resume/CV from my computer', and 'Enter my resume/CV by typing or copying it in'. The 'Cover letter' section has three radio button options: 'Use a cover letter from my profile', 'Upload my cover letter from my computer', and 'Enter my cover letter by typing or copying it in'. The 'Upload my cover letter from my computer' option is selected. A red box highlights this option and the 'File to upload' field, which contains 'My cover letter' and a 'Browse...' button. Below the 'File to upload' field, there is a text input field for 'Name this cover letter:' with the value 'My cover letter' and a note '(Maximum file size: 3 MB)'.

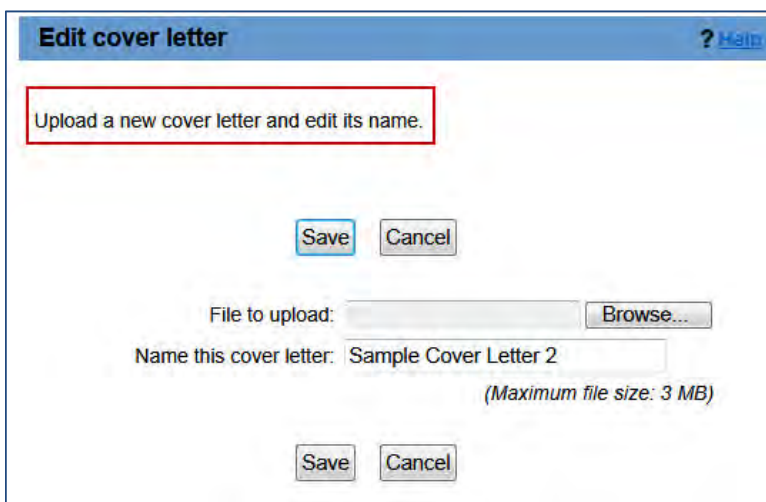
Candidates now have the option of uploading and storing their cover letter via the Resume/CV and Cover Letter Manager. When candidates click **Add new cover letter**, a new pop-up window is displayed from which they can upload a cover letter by selecting “Upload my cover letter from my computer.” Alternately, they can also opt to type the cover letter or copy and paste it from a different source.



 Candidates can upload a maximum of five (5) cover letters in their profile. Screen text reminds candidates that maximum size allowed for each file is 3 MB.

Editing an existing cover letter now has two options.

- If the candidate edits a cover letter that is typed or copy-pasted, clicking **Edit** opens the cover letter for editing in a text area.
- When candidate clicks **Edit** for an uploaded cover letter, a new pop-up window appears in which the candidate can update the cover letter’s name and upload an edited/updated file.



## 2x BrassRing Users

2xB users can view the uploaded cover letter in 2xB on the Cover Letter tab of the Talent Record as well as through actions that currently display cover letter content such as Print Resume, Forward via Email, and Schedule Interview.

A new button **Open PDF** is placed in the Cover Letter tab of the Talent Record. When users click this button, the cover letter is opened in a pop-up window in PDF format with pdf toolbar. However, when the cover letter is not available in PDF format, the Open PDF button is replaced with a **Generate PDF** button. Users can click this button to open the cover letter in PDF format. Users can print the cover letter without any change to the formatting that the candidates made before uploading the file.

If the candidate uploaded a cover letter, then the eLink Talent Record will have an additional tab called PDF Cover Letter that will display the formatted cover letter as uploaded. The content of the uploaded cover letter is displayed in flat text in the same places where the content of typed in cover letter is displayed. In addition to the Open PDF button on the Cover Letter tab of the Talent Record, the uploaded cover letter with its original formatting will display when you click View in PDF button within the Print Resume action.

**Talent Record: ramuk, antar** Actions ▾

**462BR: Payment Specialist**

Social Networks: [in](#) Source  
[viziagapatam, Andhra Pradesh 530045](#)  
[+2023052891](#)  
[2xbtesting@gmail.com](#)

Candidate Type: [External](#)  
HR Status: [ResumeScreen](#)  
HR status date: 03-May-2013  
HR status updated by: Vadapalli, Ratnakumar

Contact Details Resume/CV **Cover Letter** Experience/Education

Cover Letter  
To,  
The Hiring Manager,  
Kenexa technologies  
Hi,  
Sub: Application to the option position in your team.  
I, Ramuk Antar would like to present my candidature for the Associate Software engineer in your esteemed organization and would like to bring to your notice, my skill sets and experience that gives me good standing as a

Open PDF Print Edit

Submission History **Action Log** Print Search Filter ▾

Action	Date	Action by	Details	Name/Type
HR Status - Updated	03-May-	Vadapalli,		Current Status

## How Do Clients Get this Feature?

This feature is controlled by a new Talent Gateway setting “Allow cover letter file upload,” as well as a new “Cover letter Upload (includes cover letter cut & post)” complex widget for Gateway Questionnaires. Please contact your Kenexa Support Team or Certified Workbench User for more information.

## Workbench Self-Service Certified Users

### For Talent Gateways:

Enable the “Allow cover letter file upload” TG setting to turn on the feature on the Talent Gateway.

**WB Path:** Tools > Talent Gateways > [select TG] > Edit

Talent Gateway details

Localization settings:

\*Gateway service level: Platinum ▼

\*Resume input type: Resume upload ▼

Enable auto extraction

Enable auto proper case names

Make extraction optional after first upload

Allow apply without resume/CV on mobile

Allow cover letter file upload

Enable cover letters for mobile

Intro URL:

**For Gateway Questionnaires:**

A new “Cover letter Upload (includes cover letter cut & post)” complex widget is added to the list of widgets for GQs. The existing “Cover Letter” widget is renamed to “Cover letter cut & post,” and is available for selection if clients do not want the upload option on the GQ.

**WB Path:** Tools > Gateway Questionnaires > View sections/pages > View widgets > View widget

Widget properties [Audit Trail](#)

Question
  Text
  Graphic
  Complex Widgets

- Resume upload (includes resume cut & post)
- Resume cut & post
- Cover letter upload (includes cover letter cut & post)
- Cover letter cut & post
- Attachments
- Education builder
- Experience builder
- Job specific questions
- Job specific questions - results details
- WOTC eligibility check
- Preview application
- Optional  Required

When the “Cover letter upload (includes cover letter cut & post)” is added to a GQ, candidates have the option either to upload a cover letter or to type/copy-paste it.

# Talent Gateways – Hide Graduation Year and GPA

New Talent Gateway settings and Gateway Questionnaire settings allow clients to display or hide the education-related fields like Graduated year and GPA on their Talent Gateways.

<b>Product</b>	<input checked="" type="checkbox"/> Workbench Self-Service
<b>RDP 644 Release 13.3</b>	<input checked="" type="checkbox"/> Talent Gateways
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Specific conditions required – see details below.

## Feature Description

**Background:** Candidates provide information regarding their demographics, education, work experience etc. while applying for a job on the Talent Gateways. Education-related information includes the year in which they graduated from school/university and the GPA they attained (in case of clients with US English as locale). However for some jobs, this information is not required and collecting this information may be counterproductive.

With this project, new TG settings and GQ settings are provided to clients so they can choose between displaying and hiding the education information fields for candidates on the TGs or GQs.

Following are the scenarios where the Education fields are hidden using the new TG or GQ settings:

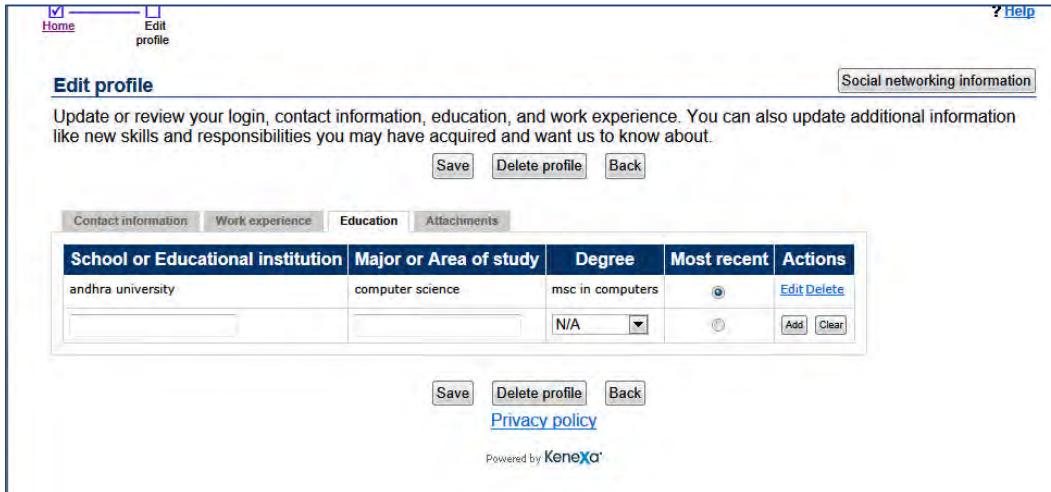
- Education Profile tab on TGs when a candidate is applying
- Education Profile tab on TGs in Edit mode
- Education tab in Profile Editor on TGs
- Education tab in Profile Editor in Edit Mode
- Education Profile tab in View Mode in Mobile apply
- Education Profile tab in Edit Mode in Mobile apply
- GQ Education Widget in Apply flow
- GQ Education Widget in Edit mode

The following figure displays a TG when none of the Education information fields are configured to be hidden:

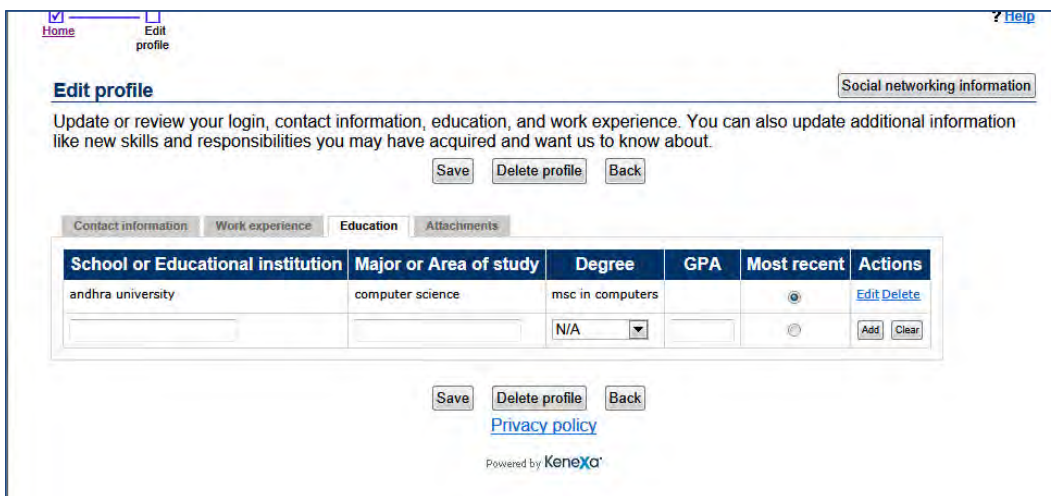
The screenshot shows the 'Edit profile' page with the 'Education' tab selected. The table below shows the education records. The 'GPA' and 'Grad year' columns are highlighted with a red box, indicating they are visible in this configuration.


School or Educational institution	Major or Area of study	Degree	GPA	Grad year	Most recent	Actions
andhra university	computer science	msc in computers		2003	<input checked="" type="radio"/>	<a href="#">Edit</a> <a href="#">Delete</a>
		N/A			<input type="radio"/>	<a href="#">Add</a> <a href="#">Clear</a>

The following figure displays the Education tab of the Edit profile section without the Grad Year and GPA fields based on one of the new TG settings.



The following figure displays the Education tab in the Edit profile section without the Grad year field based on one of the new TG settings.



 When this feature is configured to hide the Grad Year and GPA fields on the Talent Gateways, the same fields are hidden even for users who access the Mobile-optimized Talent Gateways from their Mobile devices.

## Limitations and Known Issues

This project does not hide the Grad Year and GPA fields from 2xB users. For example, Candidates' Talent Records still display these fields. However, if these fields are not displayed to the candidate and hence not filled, empty fields are displayed to the users.

## How Do Clients Get this Feature?

This feature is controlled by new TG settings and GQ settings. Please contact your Kenexa Support Team or Certified Workbench User for more information about configuring this feature.

## Workbench Self-Service Certified Users

### Talent Gateway Settings

Two new TG settings are added and an existing setting is altered in Workbench to control the visibility of these fields.

Workbench Path: **Tools > Talent Gateways > Edit** [selected TG]

**Special configurations:**

- Turn off candidate reference e-mail
- Remove general job submission link from candidate landing page
- No Talent Record creation in Enterprise when creating a full profile
- Candidate remains logged on
- Disable send to a friend
- Restrict search agent results from allowing recipient to "refine search"
- Enable field associations
- No account creation/no log-in
- Show email vendors on create an account page
- Enable job proximity search
- Proximity distance defaults: 5 Miles
- Enable Candidate portal
- Require password re-entry for document subsidiary form via Candidate Portal
- Display "High school diploma/GED" in Education Degree list (English - US locale)
- Hide all education input fields
- Hide Grad Year education input field
- Hide GPA education input field
- Hide experience input fields
- Hide "Date updated"
- Hide "Job type" from selected jobs page
- Hide search openings and featured jobs
- Referral type
- Always send preferred candidate email

Based on these three TG settings, clients can:

- Completely **"Hide all education input fields"** from candidates' view so that candidates do not enter their educational information on their TG profile or
- **"Hide Grad Year education input field"** from the "Education tab" of the "Edit profile" section of candidates' Talent Gateway profile or
- **"Hide GPA education input field"** from the "Education tab" of the "Edit profile" section of candidates' Talent Gateway profiles



As the GPA column is only applicable to US-English Talent Gateways, this setting is not displayed for TGs configured for languages other than US English.

When the first setting is checked, the next two become inactive and a tool tip is displayed to notify that the first setting needs to be unchecked in order for the rest to become active.

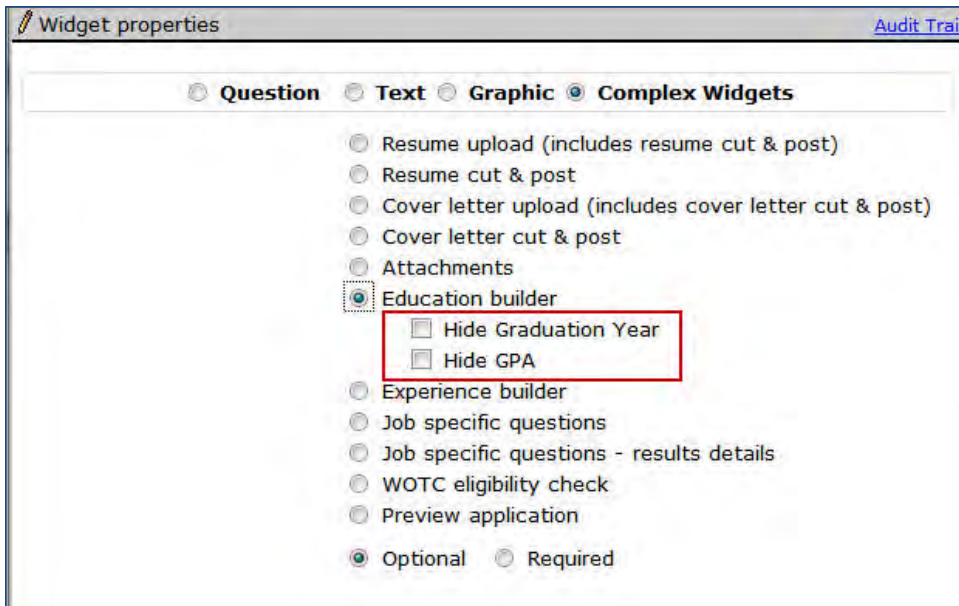
When the first setting is unchecked and either of the others is checked, that corresponding field is hidden on the TG. For example, if the "Hide Grad Year education input field" is checked, then the "Grad Year" field is hidden.

### Gateway Questionnaire settings

In order to allow Clients to control the display of Grad Year and GPA fields on the Education widget of the GQs, two new settings are now available under the Education builder widget under Complex Widgets option on GQs in Workbench

**Workbench Path: Tools > Gateway Questionnaires > Administer sections/pages [selected GQ] > Administer widgets > Add new widget > Complex Widgets > Education builder**

- Hide Graduation Year
- Hide GPA



When you check the “Hide Graduation Year” check box, candidates do not see the Grad Year education input field from the GQ on the TG. Similarly, when you check the “Hide GPA” check box, candidates do not see the GPA educational input field on the GQ’s Education widget.



# Talent Gateways – Hiding Create New Account

On internal, non-SSO enabled Full Talent Gateways, this feature allows clients to restrict internal candidates from creating new (duplicate) profiles by hiding the “Create a New Account” option on Talent Gateways and on Gateway Questionnaires.

<b>Product</b> RDP 695 Release 13.3	<input checked="" type="checkbox"/> 2x BrassRing <input checked="" type="checkbox"/> Workbench Self-Service	<input checked="" type="checkbox"/> Talent Gateways
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.	

## Feature Description

When this feature is enabled, clients can restrict employees from creating new (duplicate) profiles when logging into internal, non-SSO full Talent Gateways (TGs) by hiding the “Create a New Account” option.

When configured the Create New Account option is hidden on the following pages:

- Welcome (Landing) page
- Create Login Page\*
- Gateway Questionnaire Login Page\*
- “Apply to Jobs” from the Search Results page
- Submit Resume
- “Save to Cart” from Job Details
- “Create Agent” from the Search Results page

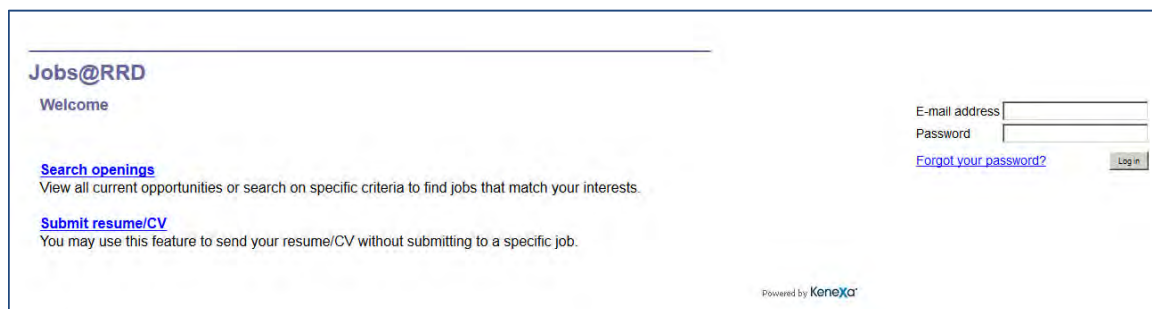
\* On these pages, a “Display on Gateway” text customization displaying instructional text is available for configuration. Configuration of this feature overrides the Display on Gateway text customization setting for both Talent Gateways and Gateway Questionnaires.

When enabling this feature on global/parent gateways, all child gateways inherit the setting to hide Create a New Account setting.

## Candidate Experience

Candidates logging into internal gateways to search and apply for internal positions no longer see the “Create New Account” option.

1. Candidate logs into internal gateway to perform a job search.  
The Welcome job search screen displays:



2. Internal candidate enters log in data and clicks **Log In**.

3. Clicks **Search opening** and clicks **Search**.
4. Selects a job and clicks **hyperlinked job title** to view job details.
5. Clicks **Apply** and completes the job application process.

## Limitations and Known Issues

This feature is only available on non-SSO, internal Full Talent Gateways. If the TG Admin setting “SSO Gateway” is set to yes, the “Hide create an account for this gateway” setting will be set to “No” and disabled. On hover, a tool tip displays: [This setting is only available on non-SSO gateways.]

## How Do Clients Get this Feature?

This feature is enabled via a new Talent Gateway setting. Please contact your Kenexa Support Team or your Certified Workbench User for more information about enabling this feature.

## Workbench Self-Service Certified Users

This feature requires the configuration of a new Talent Gateway setting.

1. **Tools > Talent Gateways > Edit Talent Gateway**

The Talent Gateway details page displays:

The screenshot shows the 'Talent Gateway details' page in Internet Explorer. The page title is 'Talent Gateway details - Windows Internet Explorer'. The page content includes several sections:

- Create an account:** A text input field with a 'Reset to default' button below it.
- Hide create an account for this gateway:** A section highlighted with a red box, containing two radio buttons: 'Yes' (selected) and 'No'.
- Gateway login:** A text input field with a 'Reset to default' button below it.
- Send to a friend email text:** A text input field with a 'Reset to default' button below it.

At the bottom of the page, there are three buttons: 'Save', 'Revert To Saved', and 'Cancel'. The status bar at the bottom shows 'Done', 'Internet | Protected Mode: On', and a zoom level of '125%'.

2. Click the Yes radio button for “**Hide create an account for this gateway.**”

3. Click **Save**.

# Talent Gateways – Proximity Search Enhancements

This feature enhances the job search experience for candidates performing proximity searches on Talent Gateways. With third-party Map API integration, TGs can now provide improved results for location-based searches.

<b>Product</b> LDP 165 Release 13.2	<input checked="" type="checkbox"/> 2x BrassRing <input checked="" type="checkbox"/> Talent Gateways
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.

## Feature Description

Currently, location and proximity based searches on Talent Gateways and requisitions by default use static data. When zip or postal codes change, that location data must be refreshed in order for Search to provide good results.

Enhancements to this feature enable searches that are based on APIs provided by third party map vendors. Using a map API-based integration provides candidates with better results when they perform a location-based or proximity job search on the Talent Gateways. The following vendors provide map service API integrations for 2xB's Talent Gateways:

- Map Quest (Open) – This API does not need a key.(No fee involved)
- Map Quest (Licensed) – This API needs the 2xB Client to obtain a License key from the third party vendor (May involve fee payment)
- Bing – This API needs the 2xB Client to obtain a License key from the third party vendor (May involve fee payment)


Clients can have this new feature configured using one of the APIs, or continue with the existing feature that uses static data.

## 2x BrassRing Users

With this enhancement, 2xB users see changes while creating a req in the “Set Proximity Coordinates” section of the req form where they provide the job location by selecting city, state and country. Instead of providing this information in three different drop-down fields, users now provide this in a text box with predictive text feature.




Users can provide the name of city or the zip code, triggering the predictive text from which they can then select the correct location.

 The predictive text box provides combination results with all the three parameters i.e. country, state and city irrespective of whether user has started with country, state, city or Zip code.

The predictive text box is available in the following screens of 2xB:

- Add new Req
- Edit req (including req approval process)
- Save req as new
- eLink req to edit (including req approval process)
- Add/edit job code (JCDD)

 When enhanced settings are turned on after a req is created with default proximity coordinates, the current location details are displayed in the new location text field with a warning message. Users should validate this information before saving the req.

**Candidates**

When candidates search jobs on Talent Gateways using proximity search, they now enter text in a predictive text box.

Predictions of country, state and city are displayed based on the text or zip code provided by the candidate. Search results based on the location and the proximity selected are displayed in grid format.



Reqs created before configuring these enhancements also come up in search predictions based on the location information provided on the requisitions when they were created.

### Limitations and Known Issues

- Switching from one map vendor to another, or rolling back the enhancements after implementing them, may result in data discrepancies.
- Translations of locations and location availability based on the name or zip code are dependent on the map vendor.

### How Do Clients Get this Feature?

This feature is controlled by two new client settings, a Talent Gateway setting (which can be edited by a certified Workbench Self-Service user), and API configuration. Depending on the vendor, a “Map Provider Key” needs to be obtained from the vendor. Please contact your Kenexa Support Team for more information about enabling this feature.

# Kenexa Tasks

Clients can select any one of the currently available map vendors. If one of the licensed map vendors is selected, a Map Provider key must be obtained by the client for configuring this feature.

- Map Quest (Open) – This API does not need a key (no fee involved)
- Map Quest (Licensed) – This API requires the 2xB client to obtain a License key from the third party vendor (may involve fee payment)
- Bing – This API requires the 2xB client to obtain a License key from the third party vendor (may involve fee payment).

## Workbench

### Client Settings

New client settings **Maps Provider for Proximity Search** and **Maps Provider Key** must be configured.

**Admin > Manage Clients > Edit client settings**

The screenshot shows the 'Edit client settings' interface. The 'Maps Provider for Proximity search' dropdown menu is highlighted with a red box and is currently set to 'None'. Below it is a text input field for the 'Maps Provider Key'. Other settings visible include 'Log HR status change' (Yes), 'Log req status change' (Yes), 'Logic for Pre-filling Gateway Questionnaire responses' (Pre-fill if candidate applied on specific Talent Gateway), 'MaxFolderSize' (5000), 'Maximum Attachment Storage (MB)' (400), and 'Mobile device approvals' (On).

The first setting is a drop down list where you select the third-party vendor. Second setting is a text box in which you insert the key obtained from the vendor. If the map vendor is not licensed, "N/A" is automatically inserted into this field and the text field is greyed out.

This screenshot shows the same 'Edit client settings' interface, but with the 'Maps Provider for Proximity search' dropdown menu open. The dropdown list is highlighted with a red box and shows the following options: 'None', 'Bing', 'MapQuest Open', and 'MapQuest Licensed'. The 'None' option is currently selected. The 'Maps Provider Key' text box is also visible below the dropdown.

## Talent Gateway Settings (Accessible to Certified Workbench Users)

When this WB setting is configured, the Talent Gateway checkbox setting **Enable Job Proximity Search** is enabled, with default values populated in the **Proximity distance defaults**. You must set **Proximity distance defaults** to the default values that the client wants their candidates to see.

**Tools > Talent Gateways > [select Talent Gateway] > Edit**

Talent Gateway details

Enable Apply with LinkedIn button:  Yes  No

Special configurations:

- Turn off candidate reference e-mail
- Remove general job submission link from candidate landing page
- No Talent Record creation in Enterprise when creating a full profile
- Candidate remains logged on
- Disable send to a friend
- Restrict search agent results from allowing recipient to "refine search"
- Enable field associations
- No account creation/no log-in
- Show email vendors on create an account page
- Enable job proximity search

Proximity distance defaults: 5 Miles

- Enable Candidate portal
- Require password re-entry for [user](#) subsidiary form via Candidate Portal
- Display "High school diploma/GED" in Education Degree list (English - US locale)

This setting is available to Workbench Self-Service users.

## Form Settings (Accessible to Certified Workbench Users)

An existing setting at req form level must be enabled to show proximity coordinates section on reqs.

- If the 'Required field' checkbox is checked, then the proximity coordinates fields on reqs will become required fields.

**Tools > Forms > Reqs > Req forms > Add new form**

**Tools > Forms > Reqs > Req forms > [select req form] > Edit form attributes**

+ Add New Req Form

Form layout  Classic  Enhanced

Restrict access by IP address:  Yes  No

Authorized IP address values: Entered (0)

Approval process  Yes  No  Rules-based URL:

Cascade approver messages

Org groups with access

- French Org group
- German Org group
- German test org group
- gporgppostopt
- gptest1

Proximity coordinates  No  Yes  Required field

Enforce final status of all candidates  No  Yes

Display Notes tab  No  Yes

## Importing Reqs

When reqs are imported from other system into 2xB, longitude, latitude and location information of proximity coordinates will be imported and displayed in the enhanced format.

If Latitude and Longitude info is not available, then the actual values such as CountryID, StateID, CityID, and Zip will be imported and displayed.



# User Query-Selects Fields

The database storage model that saves UserID, instead of user name with differentiator, is being enforced for user query-select fields. "Enable field for Automation Manager notification recipient(s)" attribute is renamed in Workbench, and will be checked and disabled by default for new user query-selects. This allows more consistent data storage while eliminating the need for Workbench users to specifically enable the attribute.

<b>Product</b> RDP 732 Release 13.3	<input checked="" type="checkbox"/> 2x BrassRing	<input checked="" type="checkbox"/> Workbench Self-Service
<b>Visible Changes</b>	<input checked="" type="checkbox"/> Yes – Workbench only.	
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Automatic – see details below.	

## Feature Description

The database storage model that saves the UserID (instead of the user name) is being enforced for user query-select fields. These are fields that pull from options of Active managers, All Active users, Active recruiters, All enterprise users. "Enable field for Automation Manager notification recipient(s)" attribute is renamed in Workbench to **"Save UserID (not display data) in database."** It will be checked and disabled by default for new user query-selects. This allows more consistent data storage while eliminating the need for Workbench users to specifically enable the attribute.

Define Pull List

**DB Fieldname** UserQS\_KK  
**Field label** User Query Select  
**Field type** single-select  
**Pull options from list of** Active managers

**Display Preferences**

Display [ ] Delimiter [ ]

Save UserID (not display data) in database

## Background

Previously, "user" query-selects could be created in two ways:

- Field level attribute "Enable field for Automation Manager notification recipient(s)": Unchecked  
Value stored in the responses (or optionresponses in case of Reqs) was:  
<FirstName> <delimiter><LastName><User name differentiator if exists>  
User name differentiator was added to differentiate between names when first and last name and to them.
- Field level attribute "Enable field for Automation Manager notification recipient(s)": Checked  
Value stored in the responses (or optionresponses in case of Reqs) was the UserID, which is unique for every user.

The second way avoids the added complexity of adding the user name differentiator to the user response. Using this method as the default will allow more consistent data storage.

## Changes

New user query-selects being created will store the UserID. UserID is also stored when users *edit existing query-selects when there is NO transaction data.*

The existing "Enable field for Automation Manager notification recipient(s)" form field attribute was available only when the client setting "Automation manager" is enabled. This restriction no longer applies; there is no client setting dependency for the this attribute.

The "Enable field for Automation Manager notification recipient(s)") attribute for user query-selects is renamed as **"Save UserID (not display data) in database"** in Workbench:

- **Tools > Forms > Reqs > Req Forms > Define custom req fields > Define new req field > Add new|Edit\* user query select field > Option source page**
- **Tools > Forms > Candidate forms > Administer form fields > Add new|Edit\* user query select field > Option source page**
- **Tools > Forms > Reqs > Req subsidiary forms > Add new|Edit\* user query select field > Option source page**

\* when editing if there is NO transaction data

There is no change in attribute label or behavior when users edit an *existing field WITH transactional data*:

- The checkbox will be disabled
- Checkbox remains checked/unchecked depending on how it was created. If the field was configured for use in AM (Checkbox checked) or not (Checkbox unchecked), it will remain the same.

### Automation Manager

Tooltip and pop-up information messaging in Automation Manager reflects the new attribute name, **"Save UserID (not display data) in database."** These trigger types are affected:

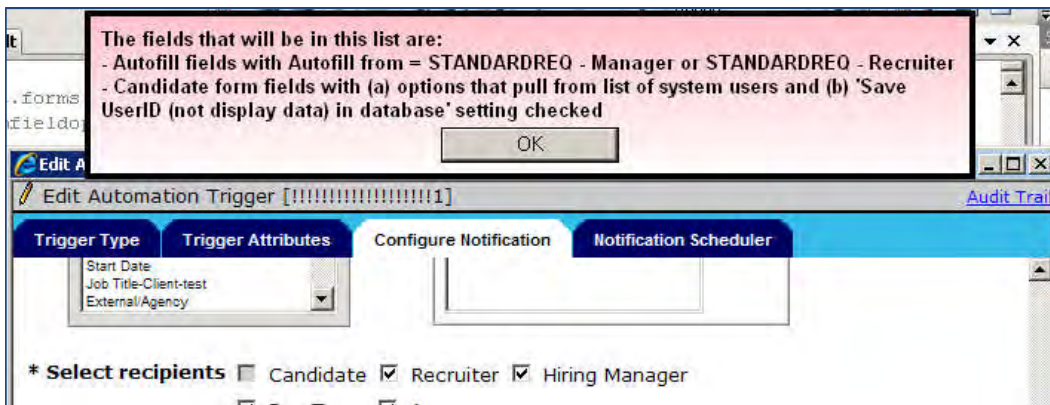
- Candidate HR Status – send talent record
- Candidate HR Status Aging
- HR Status update - notify candidate
- Update HR Status Across all Reqs for Candidate in Final HR Status
- Assessments

For example, When the "Users selected in form fields" setting is unchecked and disabled, a tool tip will display when hovering over the checkbox:

"There are no form fields configured with 'Save UserID (not display data) in database' setting checked OR with an Autofill source = STANDARDREQ - Manager or STANDARDREQ – Recruiter."

The pop up message that appears on clicking on the " ? " is also changed, as in the following example.

**Tools > Automation Manager > Admin > Add / Edit trigger**



### How Do Clients Get this Feature?

This feature is available automatically without configuration.

# Web Service API – Additions and Enhancements

The following list outlines additions and enhancements to Kenexa's existing Application Programming Interfaces (APIs) in Releases 13.3. For detailed information, see *2xB API Reference – Candidate-Specific APIs and Web Service API* on the User Resource Center (expected availability October, 2013).

<b>Product</b> Release 13.3 LDP 145 RDPs 607, 758	<input checked="" type="checkbox"/> 2x BrassRing
<b>Visible Changes</b>	<input checked="" type="checkbox"/> No – requires specific conditions / configuration for visibility.
<b>How do I get this feature?</b>	<input checked="" type="checkbox"/> Configuration required – contact your Kenexa Support Team for implementation details.

## Features List

This document presents a brief overview of the API enhancements introduced in Release 13.3.

Each new feature requires specific configuration. Please contact your Kenexa Support Team for more information about enabling these features.

### Candidate

Candidate specific APIs are APIs that directly communicate with candidates. The following is a list of added and enhanced Candidate APIs to the Candidate Portal.

- [Add, Remove Jobs from Job Carts](#) – Allows clients the ability to provide a custom user interface to candidates for adding and removing jobs to/from job carts.
- [Assessment Links](#) - Enables clients to post pending assessments to candidate portal page
- [Attachments Posting](#) - – Enables clients to post attachments to candidate portal page

## Add, Remove Jobs from Job Carts

This feature adds a new operation to add and remove job cart jobs.

Web service parameters must include:

### Operation Name:

New operation called JobCart is available.

### Data Required in Web Service Request Call:

- Candidate Authentication or Create Token
- Action (Add or Remove)
- Requisition information
  - Req ID (Auto Req ID or Optional Req ID)
  - Site ID (Optional)

### Data Returned in Web Service Response:

- Req ID
- Site ID
- Status of job action
- Status (Successful or not successful)

## Candidate Experience

Candidates can interact with a client's custom user interface providing functionality to add or remove jobs to and from the job cart.

Error scenarios as follows:

- Job has been saved to job cart.
- Job already exists in job cart.
- Invalid Job ID.
- This job has recently been deactivated by this organization.
- The job cart contains a maximum of 50 jobs. Please delete jobs from your cart in order to add new ones.

## Target Users

Clients providing a custom candidate experience.

## Limitations and Known Issues

Job carts can contain up to fifty (50) jobs.

## How Do Clients Get this Feature?

This feature requires Candidate API configuration. Please contact your Kenexa Support Team for more information about enabling this feature.

Refer to the *API Candidate-Specific and Web Service APIs* guide for full configuration information.

## Assessment Links

This enhancement introduces a new method, 'GetAssessment,' to the AccessPage API web service call. For clients using a third-party vendor, the GetAssessment method retrieves and displays links to a candidate's pending assessments on a pre-assigned third-party web page. Candidates can then click the pending assessment links to complete or view their individual assessments. When the candidate completes the assessments, candidates are returned to a third-party pre-assigned URL.

Clients must supply an authentication token and a return candidate URL in the AccessPage/GetAssessment web service call.

### Data Required in Web Service Request Call:

- Candidate AuthenticationToken
- Return Candidate URL (3<sup>rd</sup> party URL)

### Data Returned in Web Service Response:

- AutoReqID (or CustomReqID based on client configuration)
- Job Title
- Assessment Link – if link should not yet be clickable (Assessment Batch) then no value will be returned here
- Assessment Name
- Status (Successful or not successful)



All of these attributes are included in separate nodes.

## Target Users

Clients and candidates accessing a client's 3<sup>rd</sup> party website that serves as their candidate portal.

## Candidate Experience

When this feature is configured, candidates accessing their candidate portal can now access their Pending Assessments page, complete their assessments, and return to their candidate experience page.

## How Do Clients Get this Feature?

This feature requires Candidate API configuration. Please contact your Kenexa Support Team for more information about enabling this feature.

Refer to the *API Candidate-Specific and Web Service APIs* guide for full configuration information.

## Attachments Posting

This API feature introduces two new actions to the GetCandidatePortalInfo web service API call that allows clients to retrieve and post links to attachments on a candidate portal page. When candidates click the attachment link, they are redirected to their attachment. Clients can post links to individual or multiple attachments and can include a removal date for each attachment.

### Data Required in Web Service Request Call:

- Candidate Authentication Token
- Action (Add or Remove)
- Attachment Name
- Posting Date
- Posting Removal Date

### Data Returned in Web Service Response:

- Attachment Name
- Posting Date
- Posting Removal Date
- Status (Successful or not successful)

## Target Users

Clients and candidates accessing a client's 3<sup>rd</sup> party website that serves as their candidate portal.

## Candidate Experience

When this feature is configured, candidates accessing their candidate portal can now access attachments via the attachment link.

## How Do Clients Get this Feature?

This feature requires Candidate API configuration. Please contact your Kenexa Support Team for more information about enabling this feature.

Refer to the *API Candidate-Specific and Web Service APIs* guide for full configuration information.

## Kenexa 2x BrassRing®

This document includes visible change items (from R13.2 build 1 through R13.3 build 0) that are not documented, or not yet documented, individually in the Release 13.3 Product Update Guide.

### 1. Gateway Questionnaires – New Widgets RDP 993

Users that setup Gateway Questionnaires now have new options in the Widget properties. Two new widgets are available even if the relevant client settings are not turned on.

**Communications preference:** This Gateway Questionnaire widget collects information regarding email preferences of a candidate in a GQ.

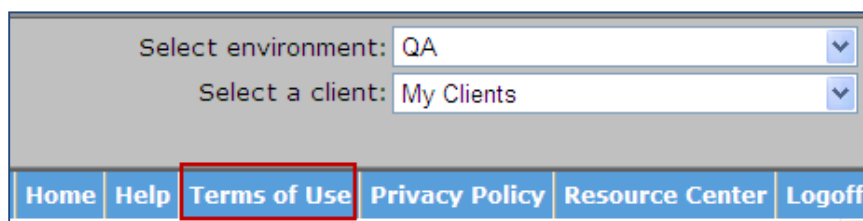
**Mobile phone country:** This Gateway Questionnaire widget allows candidates to select their mobile phone country on the GQ. The country dialing code is then prepended to the phone number if necessary at time of sending an SMS message.

### 2. Evergreen Reqs – Reposting

Starting this release, Evergreen reqs are reposted at regular time intervals to ensure that they would not seem very old requisitions. However the original posting date is retained for reporting and other posting dependencies. If there is an end date set for the req to be un-posted, that is not modified.

### 3. Terms of Use – Home Page Link RDP 748

A new hyperlink **Terms of Use** is added to the 2xB home page and Workbench home page. On the 2xB home page, this link is placed at the bottom panel. It is placed between the links for Help and Privacy Policy in line with the menu on the Workbench home page. When a user clicks this link, a pop-up window is displayed that provides the new Terms of Use page.



The screenshot shows a navigation menu with the following items: Home, Help, Terms of Use, Privacy Policy, Resource Center, and Logoff. The 'Terms of Use' link is highlighted with a red rectangular box. Above the menu, there are two dropdown menus: 'Select environment: QA' and 'Select a client: My Clients'.

**4. Form Fields – Character Limit Upgrade** Fields in Requisition Sub Form with text area type field as an auto fill source had a limitation 255 characters in length. The character length of such fields is upgraded to 4000 characters.

### 5. Outlook Plug-in – Candidate Email

If clients select the Outlook Plug-in – Candidate email option, an email is sent to candidates along with the interviewer. This email currently provides information to candidates based on the merge tokens in the email template configured. An additional line of text containing the date, time and

location information displays in the candidate email. The following text will appear and then the content from the configured email template will be appended to it:

“Interview time: <Date> from <StartTime> <StartTimeZone> to <EndTime><EndTimeZone>  
Location: <Location>”

Example: Interview time: 1/5/13 from 13:30 IST to 14:30 IST Location: Vizag

## 6. Reqs – Save to Approved reqs

Currently, "Save to approved reqs" button is displayed in the confirmation page whenever there are no approvers or all approvers have been bypassed. However, there have been issues where users used this as an option when there is no associated functionality. Therefore, based on client request, "Save Req To Approved Reqs" button is removed from the Add requisition screen in both of the following scenarios:

- When a req template without approval process is selected.
- When a req template with approval process is selected but all the approvers for that requisition are bypassed.

## 7. Communications – Merge Token for Job Details page URL RDP 724

For clients that have the Talent Gateway setting 'Go directly to login page from external URLs' checked there is an enhancement. Links to jobs in emails based on email templates will take the candidates to Job details page instead of flashing the job details and then moving forward to the login page. Similarly, when recruiters send the "Direct Req URL" for a job to a candidate, the job details page will be displayed.

## 8. Data Insight Tool – HTML Tags Issue

Clients using Data Insight Tool are facing an issue where HTML tags are seen in report column headers. To avoid the HTML tags in the reports, the existing setting "Exclude HTML tags from text fields" is being modified to include column headers. The setting would now be: "Exclude HTML tags from text fields and headers". Clients can check this option to exclude HTML tags in the column headers.

## 9. Data Insight Tool – Time Zone Indicator RDP 735

Starting with the User Time Zone project, Date and Time based reports were displayed in the time zone of the user who created the template. In this order, to provide clarity, the reports with time have the time zone indicator suffixed to the time. However, this changes the field type of the cell in which time is displayed from 'Time' type to 'Text String' type and it becomes an issue for those clients that use macros on the generated reports.

This issue is now solved by displaying the time zone indicator to the header cell of the column instead of displaying it in each cell that displays time.

## 10. Event Manager – Language Enhancements

- When 'System Default' is used as the registration page for an event, then the "Position Title" and "Req Location" fields were not displayed on the registration pages despite being configured to display. This is now being changed. The labels of these fields are displayed in the candidate's language if the language is supported by EM. If the language is not supported by EM, then they are displayed in the client default language. If the client default language is not supported by EM, then in US English.
- When the registration page is accessed from the Talent Gateway, Position and Location fields are always displayed irrespective of the configuration for the registration template. With

this release, these fields are displayed with corresponding values only when configured on the assigned Registration Page.

### 11. Event Manager – Performance Enhancement

My Schedule screen for assessors in “Event Manager” displays only current and future Available events and no longer displays past shifts. Available events are shifts that the assessor has been invited to schedule for, but has not selected. Past Available events are not displayed in this screen to improve performance. Users can still find their past events to which they did schedule themselves in the My Events tab. “Event Manager” administrators can still see the events for which an assessor was invited on the History tab of the Assessor record.

This change is available in Production since the March monthly maintenance scheduled during the weekend of March 16 – 17.

### 12. Event Manager – Event Records Enhancement

Enhancements are made around how Event Summary and Event Roster handle more than 3,000 records in IE and more than 65,000 records in Firefox. Earlier, users received an error and only be able to access the first 3,000 records in IE and the first 65,000 records in Firefox. With this change, there will be hyperlinks above the page grid for sets of records (sets of 3,000 records for IE; sets of 65,000 records for Firefox) which allows users to access all records within the browser’s supported capacity. There is a “Show All” hyperlink which pulls in all the requested records, but it also gives a warning about browser scripting errors and proceeds to give browser scripting errors as the user continues to use the page beyond the recommended record limit. To help users find the right record range hyperlink for their needs, there is also a link above the grid to export records to Excel. When clicked, all records are exported to Excel with the column information displaying on the page. From Excel, users can either get the information they need or at least find the record number that they need so that they can click on the right record range hyperlink above the grid in Event Manager.

### 13. Event Manager – New System Settings RDP 657

There are two new system settings available within Event Manager Admin related to the Event Manager’s candidate record. The first system setting allows clients to decide the tab within Event Manager Candidate record that should open by default. In order to be consistent with the current functionality, the History tab is selected in the system settings so that the same opens by default when the Event Manager candidate record launches.

The second system setting gives an additional way for users to access event specific candidate forms through a new **Open Event Form** button on the Scoring tab of the Event Manager candidate record. In order to be consistent with current functionality, the system is configured not to show the new Open Event Form button on the Event Manager candidate page by default.

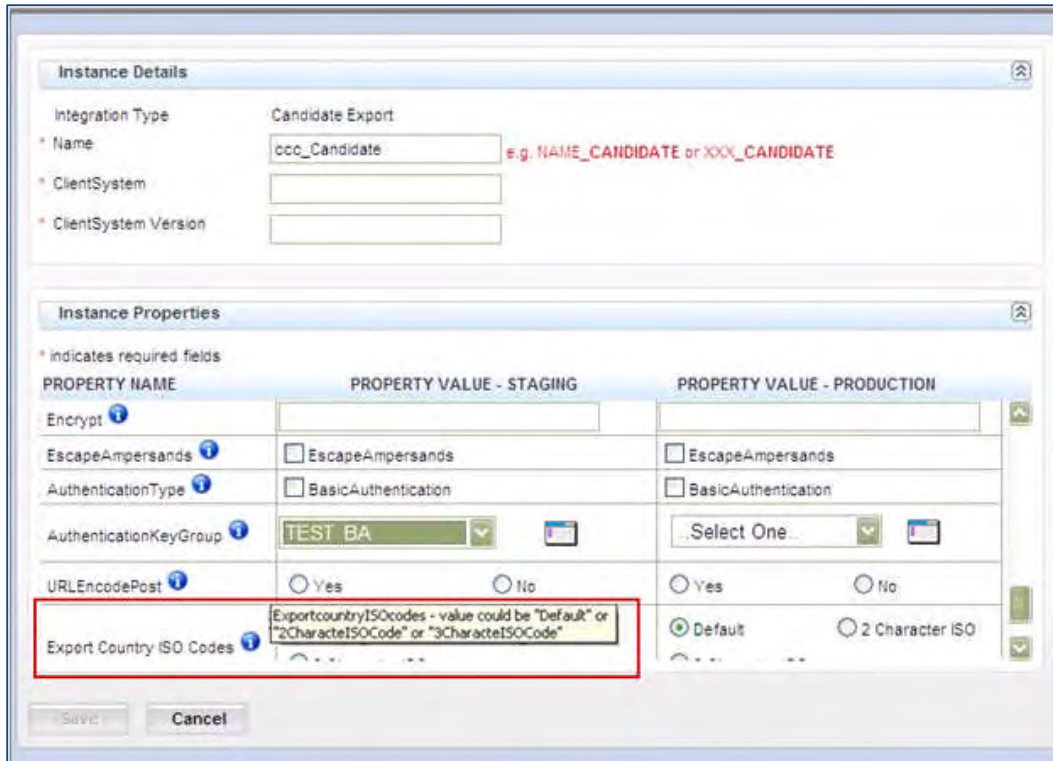
### 14. Candidate Forms – State Fields

The display format of the State field based on the merge token [#Contact-Info:State#] has changed. State name is displayed in full and in sentence case as it is displayed in a candidate’s Talent Record. E.g. North Carolina, California.

### 15. Mapping Tool – Enhancements RDP 736

Multiple enhancements are made to the Mapping Tool. The property value fields in all projects are now provided with a new icon which provides detailed description about the property in a tool tip.





Enhancements specific to the Candidate Export projects:

- A conflict occurs during configuration of the Candidate Export projects where the version property values and Configured property values are different. A new window is introduced to resolve the conflict where the users have the option to retain their chosen values.
- A new window is provided to add/edit the Authentication KeyGroup Values where users can input new Authentication KeyGroup details or edit already existing details.
- Two new values Candidate Education and Candidate Experience are being added to the Sample XML nodes.

## 16. Mapping Tool – Approvals

Mapping Tool projects no longer have an approval process. Users create a project draft and proceed for configuration without waiting for the approval routing process to complete.

## 17. Mapping Tool – All Active Integrations Link RDP 751

A new hyperlink “All Active Integrations” is displayed on the Mapping Tool home page. Clicking this link opens a new pop-up window which contains the list of all active integrations available for that client. This list includes basic information regarding all the integrations including the type of integration, the project name and version. A provision to export the integration to MS Excel is being provided when the project name and version information for that integration are available.

INSTANCE NAME	INTEGRATION TYPE	PROJECT NAME	VERSION	<input checked="" type="checkbox"/> EXPORT
JCDD_MisMatch	POSITIONDATA			
ReqImp_requisition	REQUISITION			
FormData_Import	FORM			
cand_CANDIDATE_UPLOAD	IMPORT			
HR_HRSTATUS_UPDATE	STATUSUPDATE	NewManifestTest	1.0	<input checked="" type="checkbox"/>
userImp_User	USER	NewManifestTest	1.0	<input checked="" type="checkbox"/>
Demo	REQUISITION	NewManifestTest	1.0	<input checked="" type="checkbox"/>
OOB_LOCATION_DIVISION	FOUNDATION			
OOB_SINGLE_SELECT1	FOUNDATION			
OOB_SINGLE_SELECT2	FOUNDATION			
OOB_DEPARTMENT	FOUNDATION			
OOB_POSITIONDATA	POSITIONDATA			
OOB_USER	USER			

## 18. Mapping Tool – Resources Link RDP 752

A new hyperlink “Resources” is added on the Mapping tool home page. Clicking this link displays a new pop-up window with a drop down field. This window provides information regarding the IP Addresses, the XML Harness tool and Kenexa URLs that are required for clients for integrations.

Before this change: Kenexa provided this information based on requests manually. This feature makes the information available to clients within the system and avoids delay.

Other enhancements in the Mapping Tool are:

- Replacement of text hyperlink “Click here for Details” with an icon
- Replacement of text hyperlink “Sample XML” with an icon in the Version History section of Project details page.
- Replacement of Configure and Undo Configure buttons with icons in the Configuration section
- Updated Alert message – In the Mapped fields section the alert message text is updated to include the field text when a field is selected for deletion.
- Communications – Email Templates LDP 080

The ‘Template name’ field is in a different position on all the e-mail template screens. This does not affect the configuration of email templates.

\*Template name

To e-mail address  [Add](#)

E-mail subject line

Return e-mail address  (optional)

The 'View e-mail template' and the 'Delete e-mail template' pages shows a new layout. The following image reflects the changes to the 'View e-mail template' page

The screenshot displays the 'View e-mail template' page with the following sections:

- Template name:** Nada\_Email\_voForms
- Added by:** Beit, Nada (Beit\_ID12341)
- Added on:** 16-Aug-2012
- Edited by:** Anandakumar, Usha (01801)
- Edited on:** 23-Aug-2012

**E-mail template**

To e-mail address:  
E-mail subject line:  
Return e-mail address:

Message body:  
[#Contact-info:FirstName#] [#Contact-info:LastName#]

Top/Bottom margin:  
Left/Right margin:

Email template name: Nada\_Email\_voForms

Here is a list of forms to complete:

**Add**  
[Nada\\_SimpleForm](#)  
[Sample\\_Cand\\_Form](#)

**Add URL**  
[Nada\\_SimpleForm:URL](#)  
[Sample\\_Cand\\_Form:URL](#)

Forms included: Nada Simple Form, Sample\_Cand\_Form

Attachments included:

**Template attributes**

Org groups authorized to send this email:	Org groups authorized to administer this email:	Active e-mail template:
org1	org1	Yes
Unassigned Org Group	Unassigned Org Group	Template type:
Org group2 AEEB00000E3E8B000	Org group2 AEEB00000E3E8B000	Agency:
Test Org L2 Tester	Test Org L2 Tester	Designate template as:
		Auto and Manual Send
		Save copy of correspondence:
		Yes

OK

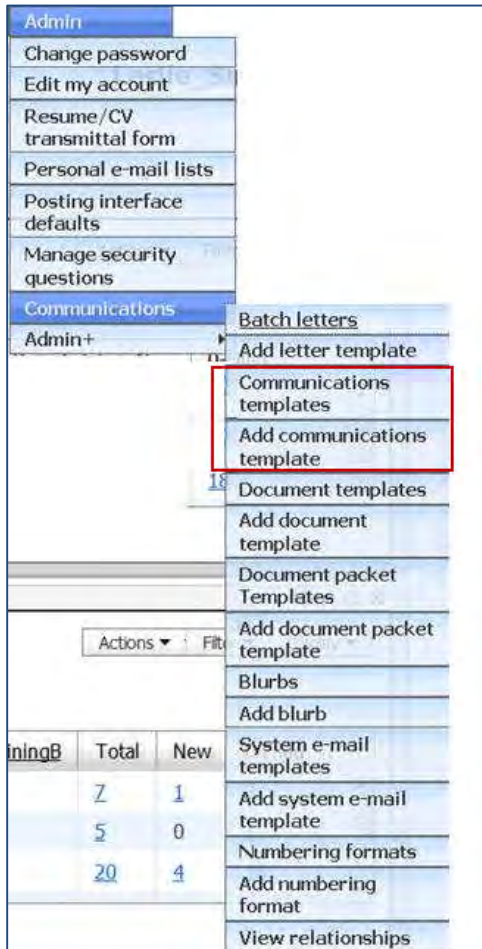
## 19. Communications – Enhancements LDP 080

As part of building out the Kenexa 2x BrassRing communications platform, we have introduced the ability to capture candidate preference for SMS (i.e., text) messages for alerts and short communications, configurable SMS message templates, and RAM support for Auto Send SMS messages. Clients who do not have SMS messaging enabled will not see most of this functionality, but will see some (primarily) cosmetic changes in the Communications Module:

### 2x BrassRing Communications menu

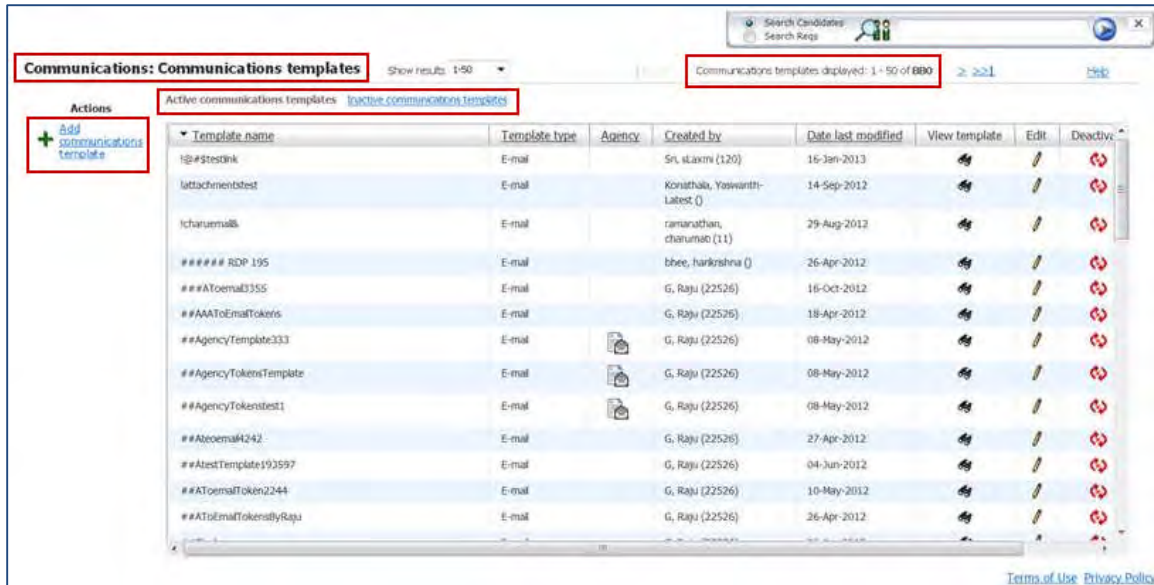
- 'E-mail templates' has been renamed to 'Communications templates'.

- 'Add e-mail template' has been renamed to 'Add communications template'.



### Administration page for E-mail templates

- The 'Communications: E-mail templates' administration page is renamed to 'Communications: Communications templates'.
- The label 'E-mail templates displayed' has been renamed to 'Communications templates displayed'.
- The 'Add e-mail template' action item has been renamed to 'Add communications template'.
- There is a new column on this page called 'Template type'. It defaults to 'Email' for all existing email templates.



## Add / Edit pages

The Add e-mail template and Edit e-mail template pages are renamed to Add communications template and Edit communications template, respectively. There are several label changes on both pages and one new attribute:

- The 'Template name' field has been separated from the 'To e-mail address', 'E-mail subject line', and 'Return e-mail address' block of fields.
- In the privileges section at the bottom of the page, 'Org groups authorized to send this e-mail' has been changed to 'Org groups authorized to send this template'.
- In the privileges section at the bottom of the page, 'Org groups authorized to administer this e-mail' has been changed to 'Org groups authorized to administer this template'.
- In the general template attributes panel at the bottom of the page on the right, there is a new attribute called 'Template type'. All existing e-mail templates default to 'Email'.
- In the same section, the label for the setting 'Designate template as' has been changed to 'Sending method'.

Help

\*Template name

To e-mail address  Add

E-mail subject line

Return e-mail address  (optional)

**\*MESSAGE BODY** Top/Bottom margin None  
Left/Right margin None

HTML  Plain text

**Text Editing Area**

Font Name and Size: Arial 13

Font style: **B** *I* U

Lists:

Indenting:

Alignment:

Insert:

Colors:

Spell/Check:  English (US)

[Clear formatting](#) [Expanded view](#)

**Insert blurb**

test(c)  
 0 March 23 4 con blurb AND AUTOFILL(c)  
 0 Test Blurb LS(c)  
 00 March23 4 con blurb OR REQ CUS and CanForm(c)  
 030711 MultiBlurbs (c)  
 1 Blurb Test Error Messages LS(c)

[Add](#) [View text](#)  
[Selection details](#)

**Upload attachments**

File	File size	Delete
No attached files		

**\*Org groups authorized to send this template:**

- ab01
- ab02
- ABCD
- b01
- b02
- Demo OrGroup

[Selection details](#)

**\*Org groups authorized to administer this template:**

- ab01
- ab02
- ABCD
- b01
- b02
- Demo OrGroup

[Selection details](#)

**Active template**

Yes  No

**\*Template type**

E-mail

**\*Agency**

Yes  No

**\*Sending method**

Manual Send

Auto Send

Auto and Manual Send

**Save copy of correspondence**

Yes  No

\* = required field

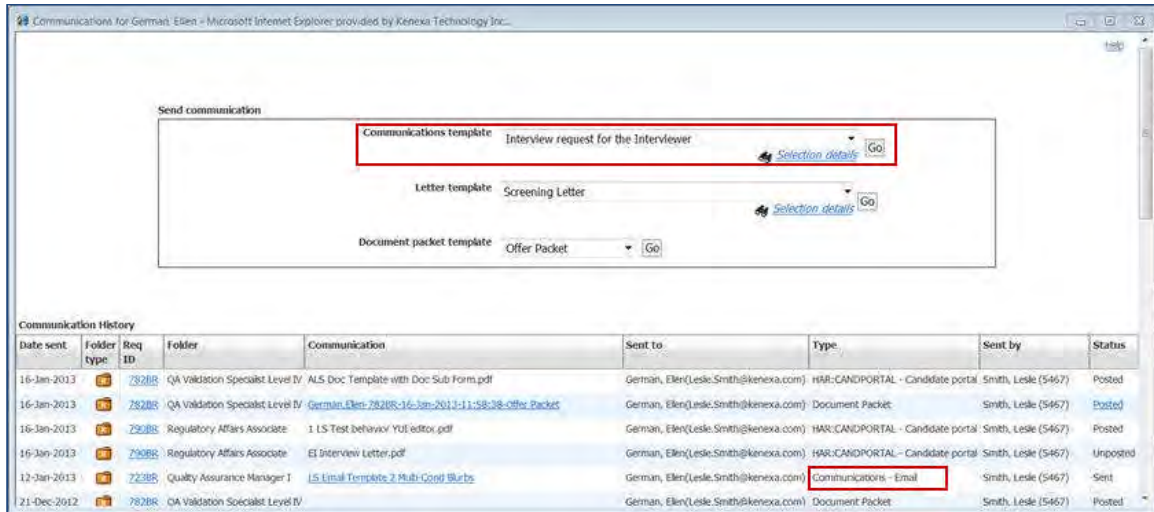
### View/Delete communications template pages

Page titles are changed from 'View/Delete e-mail template' to 'View/Delete communications template'.

New setting 'Template type' is defaulted to 'Email'.  
'Designate template as' setting is renamed to 'Sending method'.

### Communications page of the Talent Record

- Send communication container where user selects a template: 'E-mail template' is renamed as 'Communications template'.
- The Communications History grid lists the type of communication sent as 'Communication - email'. Formerly it said 'Email'.



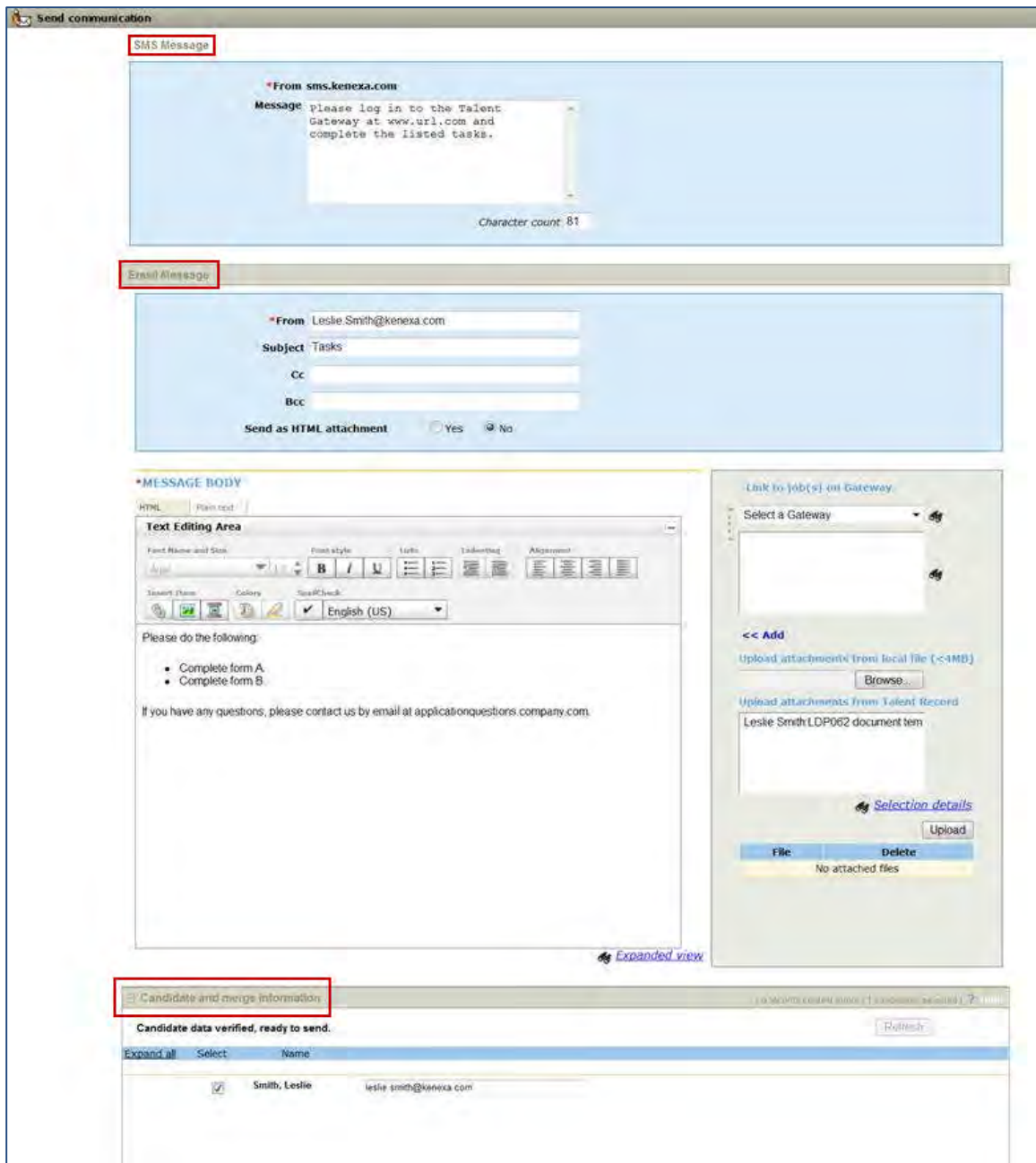
Clients who have SMS messaging turned on will see the following additional UI changes:

### Add / Edit communications template pages

- 'Template name' is in its own section at the top of the page.
- A new functional section called 'SMS template'.
- A functional section called 'Email template'. This section retains all of the settings specific to e-mail template content.
- A new label for general template settings called 'Template attributes'.
- Additional options for the new 'Template type' setting in the right panel of the Template attributes area: 'SMS' and 'Email and SMS'







## Talent Gateways

There is a new optional field: 'Mobile phone country'.

## Updates to Existing Product Update Guides

These updates will be incorporated into the URC's Searchable Release Notes Tool when that is next updated with Release 13.3 information.

Feature(s)	Update Description
Social Media – Posting to Multiple Accounts and Groups (Release 13.0 RDP 086)	<p>The following limitations were observed in this feature:</p> <ol style="list-style-type: none"> <li>1. IBM was recently informed by LinkedIn that they will no longer allow posting of jobs to LinkedIn groups. As a result, IBM may need to shut off this feature in the August timeframe. Currently IBM is in discussions with LinkedIn about this feature to see if we can retain the existing functionality, but wanted to alert customers of this possibility. The ability for candidates to apply with LinkedIn profiles will remain. The ability for recruiters to post jobs as LinkedIn updates will remain.</li> </ol>
Reqs – Notification Alerts (Release 13.1 RDP 633)	<p>The following limitations were observed in this feature:</p> <ol style="list-style-type: none"> <li>1. When users are added to a requisition as a replacement and not via the Add/Edit Req path, they do not receive notifications.</li> <li>2. When a requisition's status is changed based on requisition import, the status change notifications are not provided.</li> </ol>