KenexaRecruiter® BrassRing and Talent Gateway Solutions

Product Update Guide

Release 8.0

FINAL

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Contents

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Assessments – ePredix XML Integration

ePredix, a candidate assessment partner for BrassRing, now uses XML to communicate candidate data. Previously, HTML was used. HR-XML, an industry standard for more completely and succinctly transmitting data, is used in the web call.

For clients that use ePredix, the former pre-generated link in *Enterprise* has been replaced by a button that, when clicked while viewing a candidate, triggers a web call to ePredix. If the web service call is successful, a new window will be opened with the returned ePredix URL.

Other than the button and the method of data transfer, all assessment functionality remains unchanged.

Benefits

HR-XML is a streamlined protocol for data transfer that allows for more efficient communication between BrassRing and ePredix.

New functionality or replacement

This is replacement functionality.

Overview of implementation

This functionality change will be transparent to the end user.

Assessment invitation enhancement

The invitation to candidates to take an assessment test has been redesigned, moved into a more prominent position at the beginning of the Confirmation page. The invitation text is also now configurable in Workbench and from the Admin+ menu item in Enterprise.

This feature relates only to BrassRing's integration with ePredix. It does not necessarily affect any proposed future assessment integration projects. Only clients using the ePredix integration will notice a change.

Attachments – Candidate Uploads

Overview of functionality

Candidates can now upload their own attachments to be included in the *Enterprise* Talent Record when they submit their information through a Talent Gateway.

Because this feature potentially adds a large number of attachments into the system, organizations can designate their own specific categories of attachments, and have candidates select from those categories when the attachments are submitted. Example categories might include graphic samples, writing samples, transcripts, and reference letters. The categories that are shown to the candidates are defined by the organization, so not all existing categories need to be listed on the Talent Gateway. Categories can be designated on a per-gateway basis. For example, a client may have specific categories for a campus gateway, and other categories for a global gateway. The categories and their default values are defined in *Workbench*.

In addition, specific instructions can be created for individual reqs, informing the candidate of what types of attachments should be included with the submission. The instructions are configured in *Workbench*; please see the *Workbench* Release Notes for more information.

Once a candidate uploads an attachment, it stays in the candidate's Talent Gateway profile. Returning candidates can thus include previously uploaded attachments to additional submissions, without needing to re-upload the attachment. The candidates can also delete previously uploaded attachments.

For each Talent Gateway, organizations can define the number of attachments allowed for each candidate submission, with a maximum number of fifteen attachments and a maximum size of 5 MB for each attachment. The limits are configured in *Workbench*; please see the *Workbench* Release Notes for more information or contact your *Workbench* administrator.

The Candidate profile page has a new "Attachments" tab, which displays previously uploaded attachments. The Attachments tab allows viewing allows viewing and deleting of previously uploaded attachments. The screen displays general instructions, as well as any (optional) req-specific instructions. There is an "Attach more files" hyperlink that displays a section where the candidate can change attachment categories and upload multiple files, as many as the limit defined in *Workbench*.

In addition, the candidate can attach previously uploaded files to his or her submission. All previously uploaded files can have their category changed by the candidate by selecting a different option in the Category column's dropdown. Candidates can also delete any old attachments, but the file will be removed only from the profile and not from the Talent Record in *Enterprise*.

When the candidate clicks the "Upload" button to upload a file, a status box appears, displaying the progress of the upload. A message instructs the user that clicking the browser's "Stop" button will cancel the upload.

The Attachments tab will not be shown if the candidate does not have any attachments uploaded. Only the thirty most recent uploads will be shown. The tab will show only attachments uploaded by the candidate and not any attachments uploaded through *Enterprise*.

Candidate-supplied attachments and the Attachments audit report

The Attachments audit report screen has a new filter for the "Attachment source," which lets users run the report based on where the attachment originated. Options are each of the client Talent Gateways, Enterprise, and All. In addition, the "Sort by" field on the Attachments audit filter screen has a new option, "Category," which sorts the result list by attachment category in alphabetical order.

The values for total storage limit and currently used storage are also displayed in the report results. The "Attachment storage limit" column shows, in megabytes, the total client storage setting as defined in Workbench. The "Total current attachment usage" column displays, in megabytes, the current size of all attachments for the client. If the total usage is greater than the client's total storage limit, the value for "Total current attachment usage" appears in red.

There is no limit on attachment storage to avoid any situation where a candidate is restricted from submitting his or her information because an organization is over its allotted storage space. In the event that storage space is exceeded, BrassRing will inform the client to either reduce the total storage used or pay for a storage upgrade.

Candidate-supplied attachments and the Talent Record

The Talent Record is affected by candidate-supplied attachments in several ways. In the Attachments section, for users with proper permissions, the "Upload new attachment" textbox has been changed to a button with the same name. Clicking the button displays the Upload new attachment popup, where users browse files on their computers, upload them, and assign them a category. A maximum of five attachments can be uploaded at once.

In addition, the Attachments section of the Talent Record has several new columns: Source, Category, and Associated req(s):

- **Source** – lists either *Enterprise* or the Talent Gateway name from which the attachment was uploaded.

- **Category** – displays the category, or type of attachment, as defined by the organization. The Category name is displayed as a hyperlink. When clicked, the hyperlink opens a popup where the user can change the category type. Attachments without assigned categories display "None" in this column, which can be clicked to open the screen where users can change the category.

- **Associated req(s)** – displays the req code and job title for each req the attachment is associated with in *Enterprise*. If more than one req is associated with an attachment, each req is shown on a separate line.

Benefits

Allowing candidates to upload their own attachments makes it easier for recruiters to gather and organize information about candidates. In addition, it gives candidates more control over their job hunting experience.

New functionality or replacement

This is new functionality.

Details/Limitations/Workarounds

If a candidate uses the jobless apply functionality (submitting a resume/CV to an organization, not for a specific job), the Attachment page will still appear after the Resume/CV page. The only change from the regular functionality is that no req-specific instructions will be shown on the page.

Please note that you cannot upload an attachment with an Asian character file name using Netscape 7.1 on Windows 2000. The browser's character conversions are incompatible, and will produce an error.

Please note that if an eLink regarding candidate attachments is longer than 511 characters, it will be split into two or more links on separate lines. If you click the eLink from Outlook, an error occurs. To properly view the eLink, copy the group of links and paste it into the browser window's Address field.

Overview of implementation

Though this is an optional feature, clients without candidate-supplied attachments turned on will still have access to Enterprise functionality associated with this feature, such as sorting options and the ability to upload five attachments from the Talent Record.

New user type privileges have been created to control the viewing of candidate-supplied attachments.

Users with permission to view attachments in Enterprise will also be able to delete attachments and change the attachment category.

Implementation decisions

Clients must decide if they want to enable candidate-supplied attachments, and which user types have permission to view candidate-supplied attachments.

Candidate-supplied Attachments Workbench Configuration

User type privileges

To reflect candidate-supplied attachment functionality, two privileges were renamed, and a third was created. The first two candidate-supplied attachments privileges are located in the Candidate actions section of privileges.

The "Attachments – add/view/delete 'My *Enterprise* Attachments'" privilege was previously the permission "Attachments – add/view/delete 'My.'" No changes other than the name have been made to this permission.

The "Attachments - view 'All Attachments uploaded via *Enterprise*'" privilege was previously named "Attachments – view 'All Attachments.'" The name change was made to distinguish between this and the new permission to view attachments from Talent Gateways (see next list item). No changes other than the name have been made to this permission.

The third candidate-supplied attachments privilege is located in the Candidate actions 2 section of privileges.

The "Attachments - view 'All attachments uploaded via Gateway'" privilege is a new permission. This permission allows users to view all attachments that were uploaded from a Talent Gateway. The default setting for all user types is unselected (turned off).

Attachment category creation

Certified Tier 2 *Workbench* users can create the default attachment categories for use in the Talent Gateways. The categories are created and maintained in the new menu option Tools > Settings > Attachment categories, which launches the Attachment category administration screen. The screen has two Actions toolbar items, "Add new attachment type" and "Translate labels to Talent Gateways." The screen also lets the user view, edit, and delete attachment categories.

In the Add/Edit attachments screen, the user enters the name of the attachment category, and all of its translated values (if applicable), and clicks Save.

Attachment categories and Talent Gateways

To configure attachments in Talent Gateways, three new settings have been added to the Talent Gateways settings screen in Tools > Talent Gateways > Admin. They are:

1.   Number of attachments – Defines the number of attachments allowed per candidate submission. Possible values range from 0 to 15.

2.   Max size per attachment – Defines the maximum size of each attachment uploaded to the gateway in megabytes. Possible values are integers, from 0 to 5.

3.   Attachment categories – Displays a selectbox with a list of all category types defined in Tools > Settings > Attachment types. The user selects a category and clicks the "Add" button to move it to the selected fields box.

Text customization

To customize the text displayed regarding uploading attachments, a new tab has been added to Tools > Talent Gateways > Text customization, called "Attachments." The tab has a textbox for the *Workbench* user to enter text to describe the candidate-supplied attachments process, as well as a checkbox to define whether the text is displayed on the Talent Gateway.

The default text is, "If you have any attachments that would support your application, you may upload them here. Click 'Browse' to search your computer for the file to upload. Select the category of the attachment from the dropdown menu. You may upload additional files by clicking the 'Attach more files' link. Click the 'Upload' button to upload all selected attachments. Any job-specific attachment instructions (if applicable) will be stated below."

In addition, specific instructions can be created for individual reqs, informing the candidate of which types of attachments should be included with the submission. To customize the text, per req, displayed to candidates for the attachment upload, a new dropdown box field, "Instruction type," has been added to the Define new custom req field screen in Tools > Forms > Req forms. When the field is set to "Attachments," the "Type" field must be set to "Text" or "Text area." The procedure adds a new field on the req form where the user can enter attachment instructions.

Details/Limitations/Workarounds

A new client setting has been added, "MaxAttachmentSpace," to define the organization's maximum allotted storage space. The value is in megabytes, and the default is 100MB. Clients are not restricted from exceeding the defined limit, but will be charged for doing so.

Overview of implementation

Workbench users must be certified for Tier 2 to have access to this feature.

Implementation decisions

Clients must decide if they want to turn on candidate-supplied attachments.

Clients must decide which user types have permission to view candidate-supplied attachments.

Candidates - Configurable Candidate Types

With Release 8, clients are no longer restricted to the five existing candidate types (Internal, External, Inactive, Former employee, and Agency). Clients can now define their own, organization-specific candidate types for Enterprise.

The five existing candidate types will remain unchanged. Configurable candidate types will have the same functionality as the current standard candidate types.

The client-defined candidate types can be linked to final HR statuses. For candidate types that are associated with a final HR status, if the candidate is sent back to an intermediate HR status, a warning message alerts the Enterprise user that the final HR status had originally triggered a candidate type change, and the candidate type may need to be updated.

All candidate types, including the five existing candidate types, can be associated with source codes. Candidate types can have multiple source codes associated with them. However, a source code can be associated with only one candidate type. The candidate type associated with the source code overrides the candidate type designated for the Talent Gateway. Once the Candidate is in Enterprise, the Candidate type source code association is no longer active.

Candidate type history is captured and the 20 most recent updates are displayed in the candidate type history record. The candidate type history has new reportable fields in the DEW for reporting on original and current candidate types. In the Diversity hires report, the "Type before change" column will include custom candidate type values.

In the Candidate search screen, the "Candidates to search" field has changed from checkboxes to a multi-select list with the label "Select candidate types." By default, "All" is selected. Only candidate types that the Enterprise user has the privilege to search will be displayed.

The Search results page and the Talent Record display custom candidate type names, which continue to be displayed as hyperlinks to the Update candidate type page.

The Update candidate type page displays standard and custom candidate types as a single-select list instead of radiobuttons. Only candidate types that the Enterprise user has the privilege to update will be displayed.

Candidate Types and Talent Gateways

Through *Workbench*, administrators can designate candidates coming from Talent Gateways to be assigned client-defined candidate types.

For Basic Talent Gateway URL code strings, if a source code is used in the URL and it is associated with a candidate type, organizations should not ask additional source code questions. If clients prefer to ask source code questions, it is recommended that a source code is used in the URL that is not associated with a candidate type. If both source codes are associated to a candidate type and the candidate type differs, the candidate type will default to the gateway-designated candidate type.

Benefits

Customized candidate types will enable clients to better categorize and define their candidate pools, which aids in refining search capabilities, as well as developing targeted pools for marketing.

Creating custom candidate types for each Talent Gateway allows recruiters more control and flexibility in managing their candidate pool.

New functionality or replacement

This is new functionality.

Details/Limitations/Workarounds

Configurable candidate types cannot be inactivated or deleted, only modified. Standard candidate type names cannot be modified, inactivated, or deleted.

Configurable candidate types must have a unique name within the language of the Enterprise purchased UI locale. They cannot have the same name as any other candidate type name within the Enterprise purchased language locale. Configurable candidate type names have a limit of 75 characters.

Only one candidate type can be associated with a candidate at a time.

When running DEW reports, the five candidate type fields (Candidate type current type, Candidate type current type date updated, Candidate type current type updated by, Candidate type original type, and Candidate type original date updated), should be run as a group with only standard req fields.

There is currently no system limit to the number of configurable candidate types a client can add, but it is recommended that the number not exceed 200.

For Basic Talent Gateway URL code strings, if a source code is used in the URL and it is associated with a candidate type, organizations should not ask additional source code questions. If clients prefer to ask source code questions, it is recommended that a source code that is not associated with a candidate type be used in the URL. If both source codes are associated with a candidate type and they differ, the candidate type will default to the gateway-designated candidate type.

Overview of implementation

Candidate types are configured in *Workbench*.

Implementation decisions

Clients should decide what specific candidate types need to be created, who should have privileges to search them, if they should be linked to any HR status changes, .and if any of those candidate types should be associated with a Talent Gateway.

Customized candidate types can be administered by *Workbench* Self Service Tier 2 users. Users must be certified for Tier 2 to gain access to custom candidate types.

The management of candidate type user privileges is located in Tools > Settings > Candidate types > Candidate type administration (a new menu option).

In the Candidate type administration page, users can administer both standard and custom candidate types. The page has Actions toolbar items to Add a new candidate type and Translate a candidate type.

In the Candidate type administration page, for each candidate type, the following columns are displayed:

- Candidate type

- Description

- View

- Edit

To add a new candidate type, the user selects the Add new candidate type link in the Actions toolbar. The Add new candidate type screen pops up, and has three fields:

- Candidate type – the candidate type name is entered. The candidate type name has a maximum length of 75 characters.

- Associate to these user types to search – existing *Enterprise* user types are displayed. The user types selected will have search privileges associated with the candidate type. Multiple user types can be selected.

- Associate to these source codes – displays active source codes to select from that are not already associated with a candidate type. Multiple codes can be selected.

Custom candidate types appear as options in the Talent Gateways details page, when the user specifies the options in the "Designate candidate as" field, and throughout *Workbench*, wherever a candidate type is designated.

The translation of candidate type names functions like all other translation pages in *Workbench*. For each candidate type, administrators can enter a translation in each purchased language. The translations must be unique values. Translations can also be entered when adding a new candidate type by clicking the plus sign icon next to the candidate type name field and entering translations in the additional field(s).

Details/Limitations/Workarounds

Configurable candidate types cannot be inactivated or deleted, only modified. Standard candidate type names cannot be modified, inactivated, or deleted.

Configurable candidate types must have a unique name within the language of the *Enterprise* purchased UI locale. They cannot have the same name as any other candidate type name within the *Enterprise* purchased language locale. Configurable candidate type names have a limit of 75 characters.

There is currently no limit to the number of configurable candidate types a client can add, but it is recommended that the number not exceed 200.

In *Workbench*, on the Talent Gateway details page, the "Choose when applying" field for Source code must be set to show for the configurable candidate type/ source code association to work.

Candidates – Required Contact and Stacking Fields

There are two parts to this feature, which allows clients to designate what candidate contact information is required, and how that information is used to identify duplicate resumes/CVs.

Required contact fields

The first part of this feature is that clients can select which contact fields are required for Talent Gateways and Agency Manager. The required fields are defined per Talent Gateway and per Agency Manager, so different gateways and managers can have different required fields. First name and Last name are required across all applications. The following are the fields that can be required:

- Middle name

- Contact e-mail address

- Address line 1

- Address line 2

- City

- ZIP/Postal code

- Country

- State/Region/Province

- Home phone

- Work phone

- Other phone

- Fax

- Web address

Duplicate stacking definitions

The second part of this feature is that organizations can define how duplicate stacking logic works. Duplicate stacking logic examines a candidate's contact information to determine if the candidate already exists within the system. There are now fifteen different ways of checking that resumes/CVs are duplicates, which are:

- first name AND (email OR home phone)

- first name AND last name AND (e-mail OR home phone)

- first name AND last name AND (e-mail OR other phone)

- first name AND last name AND (home phone OR other phone)

- first name AND last name AND (ZIP/postal code OR home phone)

- first name AND last name AND (ZIP/postal code OR e-mail)

- first name AND middle name AND (e-mail OR home phone)

- middle name AND last name AND (e-mail OR home phone)

- first name AND last name AND e-mail

- first name AND last name AND home phone

- first name AND last name AND other phone

- first name AND last name AND ZIP/postal code

- first name AND e-mail AND home phone

- middle name AND e-mail AND home phone

- last name AND e-mail AND home phone

The duplicate stacking logic is defined per Talent Gateway and per Agency Manager, so different gateways and managers can have different duplicate stacking logic. With Candidate import, clients decide which of the fifteen duplicate stacking logic possibilities will be used at the time of vendor set-up. By default, First name and Home phone number or E-mail are used to determine duplicate status.

Gateway Questionnaires inherit the required settings for contact fields from the Talent Gateway from which the Gateway Questionnaire is launched. If the Gateway Questionnaire does not include any of the required contact fields, they are still required for submission, and are asked of the candidate after the Submit button is clicked.

Benefits

The configurable required contact fields provide flexibility to require contact information that might be critical for one geographic location but deemed not important for another location.

The configurable duplicate stacking logic allows organizations to more specifically select duplicate resumes/CVs, which is particularly helpful for Agency Manager.

Details/Limitations/Workarounds

Blank fields are not considered a valid match for duplicate stacking.

Once a candidate has been stacked, the duplicate stacking can not be undone.

If the Middle name field is hidden on a Talent Gateway or Agency Manager, it cannot be selected as a required contact field, or used in determining duplicate stacking logic. If the Middle name is designated as a required field, it cannot be hidden on a Talent Gateway or Agency Manager.

Individual candidates submitted via Candidate import will be rejected if the information for the required contact fields specified within the messaging profile for duplicate stacking logic is not present.

For candidate update functionality used with Candidate import, if there is a resume key, the staking logic is ignored. If no resume key is provided, stacking logic will be used.

BrassRing recommends that the duplicate stacking logic of First name AND Last name AND ZIP/Postal code should be used only for the UK or any other market where Postal code represents a very small area.

Required contact fields and duplicate stacking logic for Global Talent Gateways and Global Agency Managers are set at the global level, requiring members of the Global Talent Gateway or Global Agency Manager to have the same required fields and duplicate stacking logic.

Overview of implementation

The required contact fields and duplicate stacking functionality are updated by a BrassRing Implementation Consultant. They are available with Release 8, but no changes will be made to current configuration until the client requests it.

Implementation decisions

Clients should decide which fields they want to be required for each Talent Gateway and Agency Manager.

Clients should also decide which of the duplicate stacking logic combinations will be used for each Talent Gateway, Agency Manager, and Candidate import.

Candidates – Status Import

With Release 8, organizations can now outsource their candidate screening. *Enterprise* has new functionality that allows for candidates to be imported from approved third party applications directly into a specific req folder, with the appropriate HR status, such as Phone screened or First interview.

Candidate HR status import is performed using existing candidate import functionality. Each import can contain multiple reqs for each candidate to be filed to by the Insta-filer functionality, and each req in the import can include one optional Candidate status field. If candidates are specified to be filed to a req, the candidates will be filed into a req folder immediately upon import. Single per-candidate req forms and Multiple per-candidate req forms can be imported with candidates who are designated to be filed to a req.

In addition, candidates already in the system can have their HR statuses updated by approved third party applications. Multiple candidates can have their HR statuses updated simultaneously in batches. Client-approved third party applications update candidates, who must already exist in the system, by updating a valid status for a req the candidate is filed to.

If open tracking logic is used, *Enterprise* can accept and assign any HR status to the candidate during imports and updates, except for any final HR "hired" status. If closed tracking logic is used, candidates can be imported with either a "start" HR status or the initial "0-Filed" status only.

With the exception of a final "hired" status, the imported HR status update can trigger further integrations based on current client business logic. Please contact your BrassRing representative for more details.

Values for the HR action date field can be designated by the sending application. If no values are designated, *Enterprise* automatically sets the import or update date to the current date.

Candidates being imported or updated via the Candidate Import tool can be designated (or updated) with any candidate type, including any new active, valid client-configured candidate types. For more information on client-defined candidate types, please see the Configurable candidate types section of this document.

The following rules apply for candidate types and imports:

• If a candidate type is specified in the import, that candidate type is assigned.

• If no candidate type is specified and the candidate has a final HR status that is associated with a candidate type, the candidate type associated with the final HR status is assigned.

• If multiple final statuses with associated candidate types are assigned to the candidate, the candidate types associated with the statuses are ignored and the candidate type defers to the source code.

- If there is no HR status, or the final HR status is not associated with a candidate type and there is a single source code that is associated with a candidate type, the candidate type that is associated with the source code is assigned to the candidate being imported/updated.

- If multiple source codes are assigned and only one source code is associated with a candidate type, the candidate type associated with the source code is assigned to the candidate being imported/updated.

- If multiple source codes are assigned and more than one source code is associated with a candidate type, the candidate type defaults to External.

- If candidate type, HR status, and source code are unspecified, the candidate type defaults to External.

Benefits

The ability to update multiple candidates in batches will save clients a significant amount of time.

The new HR status integration makes it even easier for organizations to use Enterion or third parties to outsource candidate screening. Potential integration partners include:

- Assessment companies

- Interactive voice response companies

- Enterion

New functionality or replacement

This is new functionality.

New terminology

Term	Definition
Insta-filer	A new feature to instantly file candidates into reqs as opposed to the Auto-filer, which can take up to twenty-four hours.

Details/Limitations/Workarounds

If imported, the candidate HR status must match a valid client status.

Candidate HR status updates are forward-moving only. It is not possible to "undo" a prior status. For example, an update call that reverts a final status to a non-final status is not allowed, and would result in an error.

If the system imports or updates a candidate into an HR status that is currently configured to trigger a data import or export from *Enterprise*, the data export/import will still be triggered for the candidate.

The Candidate status import feature queues candidates and retries a failed submission to *Enterprise* six times to ensure that the submissions are entered in *Enterprise* during database deadlocks, timeouts, or other environment-specific problems. Please note that if the candidate's configuration is changed during between re-submissions, *Enterprise* will use the latest configuration available.

Imports and updates cannot auto-close a req.

To have an HR status updated via a third party application, the candidate must have previously been assigned to the req folder.

If a vendor can perform integrations, there are no restrictions on any import features. In addition, BrassRing will track only that an import or update is performed by an "integration user" and not by the actual vendor, so it will be impossible to determine the import or update's origin. BrassRing does not allow candidates to be updated to a "hired" status by third parties because most clients do not want third parties making hiring decisions. As a best practice, clients should provide vendors with only the statuses that are appropriate for that vendor.

As a best practice, vendors should also continue to include the req ID in the codes section and in the applicant status section, if it is used.

Overview of implementation

Candidate status import is implemented by a BrassRing Implementation Consultant. Clients should talk to their BrassRing representative to discuss if importing candidate HR statuses from third parties is productive for their organization.

Implementation decisions

Clients must decide if any third parties can import and update candidates.

Candidate Forms – Configurable Field Alignment

Overview of functionality

Candidate-facing form fields can be configured in *Workbench* to have a left alignment, instead of the default center alignment. Previously, the alignment of form fields was not configurable.

For each candidate form sent via *Enterprise*, as well as Talent Gateway questions and attached forms, the fields can have either default alignment or left alignment. The default alignment is the same alignment as has always been used in *Enterprise*. With the exception of "label" field types, questions and response fields align toward the center of the form.

When the new left alignment option is selected, this option left aligns all questions, and left aligns the response fields at the center line.

Benefits

Configurable form field alignment enhances the candidate experience while completing forms, and expands the customizability of candidate-facing elements of *Enterprise*.

New functionality or replacement

This is new functionality.

Overview of implementation

On implementation, all clients will have the Default setting activated.

Implementation decisions

Clients should decide whether they wish to change the appearance of their forms.

Workbench Configuration

The configuration is a new forms attribute. It is set by navigating to Tools > Forms > Candidate forms, and selecting to Edit form attributes for the specific form. The new setting, "Form field alignment," has two options: Default and Left. Selecting left aligns the form's questions to the left, while the Default option keeps them aligned in the center.

To set a Talent Gateway's question's alignment, the user navigates to Tools > Talent Gateways > Admin and selects to Edit the gateway. The new "Question and form field alignment" setting has two options: Default and Left. Selecting left aligns the questions to the left, while the Default option keeps them aligned in the center.

DEW Modifications

Several major modifications have been made to the Data Export Wizard (DEW) for Release 8 to increase usability and flow. All changes for this release are made in the DEW Profile manager; the Task manager will remain unchanged.

The major changes are:

- Restricted access to specific data based on user privileges

- Profiles now have search criteria saved with the output fields

- New output fields and filter criteria are available

- Profiles may be shared with other system users

- Form attributes have been reconfigured to be form-specific

User privileges restrict access

Previously, access to the DEW was either on or off for *Enterprise* users. Now, four different access levels exist for better security and usability. In addition, data access for all users is restricted to include only data that they can normally view in *Enterprise*. The access levels are:

- Field-level

- Org group

- Candidate type

- My/All reqs

Field level – *Enterprise* checks the user's access to forms and fields within forms, which are defined according to user type privileges. This level of security is applied to the Form fields category on the Field selection screen and the Forms filter screen.

Field-level security functions first on a category-level basis, then form-level, and then field-level. A user's ability to run a DEW query on a specific form depends on whether his or her user type has Output privileges for each form. Users with user types that don't have Output privileges for a form will not see any fields from that form on the Available fields box on the field selection screen. If the user's user type has Output privileges for a form, the field-level privileges are checked. When running a DEW query using a Forms filter, if the user's user type does not have Search privileges for a specific form, that form name does not appear in the "Form name" filter on the Form filter screen.

The following table details the category-level user type privileges needed to view specific DEW data categories:

User privilege	Category of privilege	DEW criteria viewed with permission
HR status – view	Candidate actions	The HR Status fields category in the field selection screen.
Notes – view	Candidate actions	The Notes fields category in the field selection screen.
eLinks – view history	Candidate actions	The eLink tracking fields category in the field selection screen.
Communications – enable	Communications	The Communications history fields category in the field selection screen
Search interviews – master	Scheduling	The Interview scheduling fields category in the field selection screen.
View agency code details	Admin+	The Agency code field category in the field selection screen.
View agency contact details	Admin+	The Agency contact field category in the field selection screen.

Please note that category-level security will not be applied to the Candidate, Req and Form fields categories. If a user type does not have basic privileges for viewing candidates, reqs, or forms, it is a best practice recommendation that the user type should not be granted access to the DEW.

In addition, form fields can be designated in *Workbench* to be hidden for specific user types. If a field is designated with "Hide for these user types," and a user of that user type is running a DEW query, the fields designated as hidden do not appear in the DEW.

Org group – The data a user has access is based on his or her org group's association with req templates. On the field selection screen, only req (custom) fields associated with req templates that the user's org group has access to will appear in the Req fields (custom) category within the Available fields selection box. Fields common to multiple req templates will appear for all users associated with org groups that have access to those templates.

Additionally, only searchable fields that are associated with req templates that the user's org group has access to will appear as Req filter options.

When the data is exported using the Req filter with org group-level DEW security, the *Enterprise* user will see only data associated with his or her org group privileges. Organizations that do not use org groups will not have this level of DEW security.

Candidate type – *Enterprise* users can be restricted by user type from searching specific candidate types, both standard and custom. If a user does not have the privilege to search candidates of a specific candidate type, that candidate type will not appear for that user in the DEW candidate type filter field.

Additionally, only user types with the "Candidate – erase" privilege can view the "Erased candidate" candidate type in the filter.

My/All reqs – When using the Req filter, only data for reqs that the user has access to will be returned. If the user has the privilege to view all reqs of a specific req status (for example, All reqs – view open), those reqs will be shown. If the user does not have the privilege to show all reqs of a req status, *Enterprise* checks to see if the user has the My reqs privilege for that status (My reqs – view open). If a user does not have user type privileges to view All or My reqs of a status, reqs of that status do not appear in the DEW results when using the Req filter. All req statuses will appear on the DEW req filter options screen regardless of privilege, but only data for reqs the user can view will be returned with query results.

DEW security is enforced on a user-specific basis. If a user creates and shares a profile with another user, the second user will have access to only the data that his or her privileges allow.

Save existing profile as new – There is a new Actions toolbar item, Save as new profile, that allows users to save an existing profile as a new profile. Save as new profile opens the Save as new profile screen, pre-populated with the existing profile's criteria.

Enhanced profiles

Previously, DEW profiles were lists of output fields. With Release 8, profiles now consist of output fields, a filter type, and specific filter criteria to be run together. The Profile manager screen has Actions toolbar links to Add a new profile, Save an existing profile as new, Edit a profile, and Delete a profile. Profiles can also be viewed by clicking the View icon associated with the profile.

Please note that the Run hyperlink in the Profile manager screen may not be active if a profile does not have filter criteria associated with it. Thus, *for all DEW profiles created previous to Release 8, the profile will have to be edited to include filter criteria before it can be run*. The Run link will become active once filter criteria has been added to the profile.

Since profiles now include both output fields and filter criteria, the Run link gives the user the option to run the query now or in background mode, whereas before it launched a filter options screen.

The Add profile and View profile screens have been modified to include filter criteria, as well as the previous profile fields.

To add a profile, the user navigates to DEW > Profile manager, and clicks the Add new profile link. A Profile basics screen (step one) appears, where the profile is given a Name and Description. In the same screen, fields for export are selected based on category, though the fields and field categories that the user has access to are restricted by user privilege.

In addition, in the Profile basics screen contains a "Send profile to system users" field for selecting other *Enterprise* users to whom the profile will be sent. A maximum of 50 users may be selected. Users must have access to the DEW to have profiles sent to them. Once a profile has been shared with a system user, it will appear on his or her DEW profile manager screen, and that user may edit or delete that profile.

Once the Profile basics screen has been completed, the Filter type screen (step two) appears. In the filter type screen, the user selects the filter type for the DEW query (Resume/CV, Req, HR status, Forms, or Folders filter). Only one filter type can be selected.

After the filter type has been selected, the Filter criteria screen appears. The specific criteria varies depending on which filter is selected. When filter criteria have been selected and the user clicks the Save button, the profile is saved. Once the profile has been saved, the next screen gives the user three choices: to run the profile now, to run it in background mode, or to close the screen. Security checks are run when the query begins running.

The same steps that take place when adding a new profile take place when a user selects to save a profile as new, except that default settings are filled in to be verified and saved.

The following table details the available options for each type of DEW filter. All available options are dependent on the user's viewing privileges. Please note that because most of the req filter options are custom, they are excluded from the table.

Filter type	Criteria	Options (if applicable)	Option type
Resume/CV filter	Select candidates to search	• All candidates • All candidates in req and working folders • Only candidates in req folders	Radiobutton
Resume/CV filter	Candidate type	All available candidate types, both standard and custom, that user has the ability to search	Multi-select list
Resume/CV filter	Last name (New)	N/A	Textbox with 100 character limit
Resume/CV filter	First name (New)	N/A	Textbox with 100 character limit
Resume/CV filter	Candidate reference number (New)	N/A	Textbox, cannot have a value greater than 999999999999999999
Resume/CV filter	Date last loaded	N/A	Number of days, or Date range (From – To)
Req filter	Candidate type	All available candidate types, both standard and custom, that user has the ability to search	Multi-select list
Req filter	Status	All req statuses	Multi-select list
Req filter	Date created	N/A	Date range
Req filter	Date opened	N/A	Date range
Req filter	Date closed	N/A	Date range
HR status filter	Select candidates to search	• All candidates in req and working folders • Only candidates in req folders	Radiobutton

Filter type	Criteria	Options (if applicable)	Option type
HR status filter	Candidate type	All available candidate types, both standard and custom, that user has the ability to search	Multi-select list
HR status filter	HR status date range	N/A	Date range
HR status filter	User updating HR status	Available *Enterprise* user names (displays only those *Enterprise* users who have made HR status updates)	List box
HR status filter	Activity	• Only the current HR status data • All current and historic HR status data	Radiobutton
HR status filter	HR status	All possible HR statuses	Multi-select list
Forms filter	Select candidates to search	• All candidates • All candidates in req and working folders • Only candidates in req folders	Radiobutton
Forms filter	Candidate type	All available candidate types, both standard and custom, that user has the ability to search	Multi-select list
Forms filter	Form submission date range	N/A	Number of days, or Date range (From – To)
Forms filter	User who submitted the form	Available *Enterprise* user names	List box
Forms filter	Form name	All forms the user has privileges to search	Multi-select list
Folder filter	Candidate type	All available candidate types, both standard and custom, that user has the ability to search	Multi-select list
Folder filter	User filing to folder	Available *Enterprise* user names	List box
Folder filter	Working folder name	Available working folders, as well as user Inbox and inactive working folders	Multi-select list

New output fields

There are multiple new output fields available in the DEW. The following table lists fields that are new to the DEW for Release 8, by field category.

Field category	Field name
Candidate fields	Candidate type Current type
Candidate fields	Candidate type Current type date updated
Candidate fields	Candidate type Current type updated by
Candidate fields	Candidate type Original type
Candidate fields	Candidate type Original type date updated
Req fields (standard)	Added by
Req fields (standard)	Add type
Req fields (standard)	Date on hold
Req fields (standard)	Employee name
Req fields (standard)	Req team
Req fields (standard)	Start date
Req fields (standard)	Date removed
Forms fields	Added by
Forms field	TG score
Form approval fields (available for forms where the approval process has been turned on)	Approval status update by
Form approval fields (available for forms where the approval process has been turned on)	Approval status date
Form approval fields (available for forms where the approval process has been turned on)	Approval status

In addition, several output fields have been removed from the DEW. The Folder ID field has been removed from several field categories, and the two "For:" fields have been removed from the Notes category.

Default output fields

Several default output fields have been added for each of the DEW filters. For the Req filter, if no req profile fields have been selected, the export automatically contains a requisition ID (either the BrassRing auto-generated one or the client's custom req ID based on their req configuration.)

For all other filters, the Cand ref num, First name, and Last name fields will be included if no candidate fields have been selected within the profile.

Form-specific attributes

To reduce the number of duplicate rows returned in the DEW results, the form attributes common to all types of client custom forms (Added by, Edited by, etc.) have been reconfigured so that they are associated with each individual form. Users can now pick a single specific attribute for one form and another specific attribute for another form to be

output on the same profile. For example, a user may wish to export the Added on date for one form and the Edited by date for a different form.

When choosing Forms fields, the list of fields to select from displays the name of the form in brackets in front of the field name. For example, there could be "[Addendum] Added by" and [EEO] Added by."

DEW results

DEW results contain only data that the user has privileges to view, as detailed in the previous section. If the query is run in realtime, when the query is finished running, the user is presented with a screen with a "Download" button that, when clicked, opens a "Save as" dialogue box where the user saves the MS Excel file to his or her machine. If the query is run in background mode, the results are sent in an eLink to the user when they are ready.

The results for DEW queries now include all of the profile details in a separate Excel tab from the query results, so that when results are viewed, the user can view the criteria used. The profile details include the profile name, all selected filter criteria, and the time the DEW was executed.

Benefits

The new DEW data access privileges eliminate many of the existing data security concerns and allow clients to provide greater DEW access privileges to a larger group of users within their organization.

In addition, the improved workflow increases usability, which can lead to more efficient use of *Enterprise*.

The addition of form-specific attributes when selecting fields eliminates the multiple data rows that were previously returned.

New functionality or replacement

This is both new and replacement functionality.

Details/Limitations/Workarounds

If a user attempts to save an existing profile as a new profile but does not have proper privileges to access all data in the profile, a warning message appears informing the user that output fields and filter criteria have been removed from the profile.

It is recommended that when saving profiles, a "days back" criteria is used instead of a specific date range.

Overview of implementation

Upon the upgrade to Release 8, all existing DEW profiles must be modified to include filter criteria before they can be run.

All profile fields to which the user does not have access will automatically be removed from his or her profiles.

Implementation decisions

Clients must decide, in conjunction with the new security levels, if any additional users should have access to the DEW.

eLink Enhancements

Overview of functionality

With Release 8, clients will be able to distinguish in the e-mail subject line between eLinks sent that require action to be taken from eLinks sent informing users of a process. eLink confirmation and eLink response subject lines will also now include the original eLink subject line. In addition, clients can implement functionality that allows system users and non-system users to be copied or blind copied for candidate, form, and req eLinks.

Subject line enhancements

When sending an eLink, the Form to view field displays the Date added and Form ID along with the current Candidate name and Form name. This additional information assists users in identifying the correct form when multiple forms of the same name are attached to a single candidate. The subject field will pre-populate with information.

When a user receives an eLink about a single candidate, the Subject line displays the candidate's name. When the user receives an eLink about multiple candidates, the Subject line will display the text "Multiple candidates."

When a user is Cc'd or Bcc'd, the subject line of the eLink is prefaced with "Cc" and the eLink summary to make it clear that he or she is not the original recipient. The Cc and Bcc recipients receive a summary copy of the original eLink. The Bcc recipients can see the Cc recipients, but not other Bcc recipients. Cc recipients do not see the Bcc recipients.

CC and BCC

If this feature is enabled, which it is not by default with Release 8, the "Cc" and Bcc" fields will appear throughout *Enterprise* when the user sends an eLink. The "To" recipient of the eLink will not see any of the other recipients.

"Cc" and "Bcc" options are not available for req approval routing, and are disabled when eLinking a completed form to approve.

Benefits

Displaying the original eLink subject line with the eLink confirmation and eLink response provides the user more information at first glance reducing unnecessary clicks.

Being able to Cc and Bcc eLinks gives *Enterprise* users more flexibility in their communications.

New functionality or replacement

This is new functionality.

Details/Limitations/Workarounds

Candidate-related eLinks sent to "Cc" and "Bcc" recipients will not be recorded in the eLink section of the candidate's Talent Record.

If the recipient needs to see more details, such as the actual form or the req details, he or she should be listed as a "To" recipient and not a "Cc" or "Bcc" recipient.

Overview of implementation

The Cc/Bcc setting is an on/off setting that is off by default.

Implementation decisions

Clients must decide if they want the Cc/Bcc functionality turned on.

eLinks – Form Approval

Completed candidate forms can now be subject to approval by eLink. Previously, only req forms could be approved. Approval requests are sent for completed forms, though once an approval is sent, the form can be modified only by *Enterprise* users; if the form is modified, the approval request is resent. If a form is resent for approval, all previous approvals are nullified. If a recipient has not opened an approval eLink and the form is edited by an *Enterprise* user initiating a new approval request, the original approval eLink expires and an error message displays when the recipient tries to access the eLink.

The recipient of the approval request either approves or declines the form, and must enter a reason for the decision. *Enterprise* users can approve a form on behalf of other recipients by clicking the hyperlinked Pending status in the approval history table for the selected recipient.

The approval status for the form displays on the form's approval history table, as well as in the candidate's Talent Record's Form and eLink sections. The form approval history table, which is accessed from the candidate's Talent Record Form view icon, retains only current data.

Approval process

To eLink a completed form for approval, the user first navigates to the form either in req or working folders, or in candidate search results. The user then clicks the eLink form icon, which pops up the eLink form page. At the top of the screen are three radiobuttons: View, Edit, and Approve, which specify how the form is being sent. The user selects Approve and when the rest of the standard "eLink a form" fields are completed, the user clicks Send, and the form is sent for approval.

The recipient receives an e-mail with the subject line, "Please approve the following form: <Form name>: <Candidate first name Candidate last name>." The eLink contains the candidate's hyperlinked name that, when clicked, takes the user to the form approval page. The approval screen displays the form with all of the fields in view, not edit, mode. The user selects either the Approve or Decline radiobutton, enters a brief statement in the Reason for selection field (maximum of 250 characters), and clicks Save. The reason for selection is archived, and can be viewed by clicking the hyperlink for the approval status in the Comment/response column in the Form eLink subsection of the candidate's Talent Record.

The recipient of a form sent for approval can view all data fields on the form, but cannot edit the form. The recipient is required to complete the approval selection and reason for selection fields only.

Approval history

The approval history is displayed as an addendum at the bottom of the completed approval form. It is displayed when the form is accessed in view mode, but not edit mode. The approval history displays three columns: Status date updated, Status updated by, and Status. The history retains and displays only the most recent transaction.

If a form's status is Pending, the pending status is a hyperlink to the Approve on behalf page. When clicked, a box pops up asking the user if he or she is sure they want to approve on behalf of the approver. An *Enterprise* user cannot approve on behalf of a recipient that has already declined the form. Once the approval has been made on behalf of someone else, the approval status changes to Approved and the hyperlink to the Approve on behalf page is inactivated. The Status updated by column displays the *Enterprise* user's name approved on behalf of the original recipient's name.

Talent Record

In the Talent Record, the eLink section has been divided into two subsections: Candidate eLink and Form eLink, which are accessed by clicking eLink in the Jump to menu bar.

The Forms section of the Talent Record has two new columns: Form ID and Form approval. The Form ID number is a unique system-generated number assigned to the form as the form is created. It already exists but was not displayed previous to Release 8. The Form approval column displays the form's approval status.

Blank eLinks

Blank eLinks are now recorded and displayed in the candidate's Talent Record eLink section, which is segmented into two subsections: Candidate eLinks and Form eLinks. All eLinked forms, completed and blank, will be recorded in the form eLink subsection.

Form approval and reporting

The approval status, updated by, and date updated are reportable fields in the DEW. It is recommended that when reporting on approval fields in the DEW, users select all three fields: Approval status updated by, Approval status date updated, and Approval status, all of which are in the Form fields section. Additional candidate fields should not be included, because data for each approval field is returned on a different row, and exports for multiple approvals for a single candidate can be complex.

A new column has been added to the eLink responsiveness report: Candidate name. eLinks with Multiple candidates will display separate rows per candidate.

Benefits

The ability to track forms aids in clients' reporting. Tracking blank eLinks is particularly useful in conjunction with EEO reporting. If an organization is audited, it will now have documentation that an attempt was made to capture EEO information.

Form approval expands *Enterprise*'s current approval routing functionality to include all kinds of forms, which is useful for gathering candidate information.

New functionality or replacement

This is new functionality.

Details/Limitations/Workarounds

Approvals for forms work for One per-candidate and Single per-candidate/req combination forms only. Only completed forms can be sent for approval. Blank forms cannot be sent for approval.

The approval process cannot be turned off if any forms are in Pending status. All forms must be in the Approved or Declined status to turn off the approval process.

eLink security restrictions apply for eLink form approvals.

eLinking a completed form for approval cannot be performed by eLinking the candidate Talent Record with forms attached to view or complete.

If an *Enterprise* user eLinks a form with approval process turned on for the form type but does not want to eLink for approval, the form can be eLinked in view or edit mode.

Overview of implementation

Form approvals and blank eLink tracking will be implemented with Release 8. Existing user type privileges apply for form approvals.

Blank eLink tracking is implemented by default with Release 8. Existing user type privileges apply for form approvals.

Implementation decisions

Clients must decide which forms need approval.

Email Enhancements

To improve the usability, customization, and automation of correspondence conducted through *Enterprise*, there have been several enhancements made to email functionality:

- "From" address is specified in the email template

- Candidate first and last name tokens are available for use in email templates for customized greetings

- Additional customized sender information is included for personal signatures

- Email templates are now administered via org groups

- Appropriately-gendered greetings are used throughout email based on form field responses

- Expanded view link has been added to the Send communication window

- Users can configure req-based automated email communications by HR Status

Specify a "From" address – A new field, "Return e-mail address," has been added to the Add/edit email template screen. The email entered in this field defines a generic email reply-to address that displays in the "From" line of the message at the time of sending. If the field is left blank, it populates with the sender's email address at the time of sending the communication. The field is not required.

Insert variable for message customization – The Message text area of the Add/edit req e-mail template screen now has an "Insert variable" button that, when clicked, launches a popup for inserting name tokens and user-specific information. The variable inserted by tokens will insert at the bottom of the text area, and should then be moved to their proper place in the message. The available tokens for use are:

- Candidate first name

- Candidate last name

- [*Enterprise*] User first name

- [*Enterprise*] User last name

- [*Enterprise*] User e-mail

- [*Enterprise*] User job title

- [*Enterprise*] User department

- [*Enterprise*] User phone number

- [*Enterprise*] User fax number

The *Enterprise* user tokens can be used to customize a signature, or insert contact information into the message.

Org group authorization – A new selectbox, "Org groups authorized to administer this e-mail," has been added to the Add/edit email template screen. The administrator who is setting up the email template uses the field to select which org groups have access to edit the email template. The setting acts as an additional filter on the privilege to administer email templates, so it applies only to users who have access to administer email templates already. This field will not be required for organizations that do not use org groups.

In addition, a new field has been added to the Add/edit org group screen, "Affiliated e-mail templates to administer." Any templates selected in this field will be available for administration by members of the org group.

Gender-specific salutation markup – Custom greetings can be designed to address the candidate with the correct salutation, based on a form field response. For example, the question "Preferred form of address" could be a Talent Gateway question. Based on the response, the candidate can be greeted with "Dear Sir" or "Dear Madam." A customizable greeting is particularly beneficial for companies communicating with candidates in languages where the greeting changes based on the candidate's gender. Greetings are configured by an Implementation Consultant.

Expanded view link – An Expanded view link has been added to the Send communication window. When clicked, the link pops up a screen that displays a larger visible area for the text entered in the window.

Req e-mails sent by HR status – Organizations can now configure *Enterprise* to send emails for a specific req when candidates filed to that req reach a certain HR status. For reqs with this feature enabled, candidates will be sent an email either upon being filed to a req folder with the designated status (moved or copied within *Enterprise* with a status, or imported with a status directly to a req folder), or upon updating the candidate's status within the req folder. The configuration is performed in *Workbench*, by req template.

Benefits

Customized emails enable recruiters to personalize their correspondence to candidates automatically, without needing to edit individual emails.

In addition, users working with candidates in multiple languages no longer have to navigate gender-specific greetings. This is particularly useful for communicating with candidates in languages that use greetings that change based on the gender of the recipient.

Org group-based email template administration makes editing communications by division more manageable in larger organizations.

Req-based automated email communications sent by HR status make the communications process easier for *Enterprise* users by reducing their manual workload.

New functionality or replacement

This is new functionality.

Details/Limitations/Workarounds

Qualifying candidates will receive the auto-sent req email once per relevant HR status, per req, within a 30 day period. The 30 day period begins with the last relevant HR status trigger for the candidate(s) for the selected req folder.

If the req email has been translated into multiple languages, and a translation exists that matches the candidate's Talent Record language, the candidate will receive the message in his or her Talent Record language. If no translation exists, the email is sent in the client base language.

Overview of implementation

When clients upgrade to Release 8, a migration script is run on existing email templates. The script formats existing emails with new tokens, but maintains the original (pre-Release 8) structure of the emails by performing the following actions:

- Inserts tokens for first name and last name into all existing *Enterprise* email templates

- Inserts a space between the token for first name and last name, at the top of the message body

- Inserts two breaking spaces after the first and last name tokens

- Inserts the message text after the two breaking spaces

As part of the upgrade script, all org groups will be selected for "Org groups authorized to administer" in all existing email templates.

Implementation decisions

Clients should decide if they want to re-format existing email templates using tokens and markup.

Clients wanting to restrict email template administration by org group should decide which org groups have access to administer specific email templates.

Clients wanting to automatically send emails per req by HR status need to decide which reqs, HR statuses, and emails to tie together.

Workbench Configuration

Automatically-sent req/HR status e-mails

The configuration is performed per req template. Users navigate to Tools > Forms > Req forms, and select to edit the form's attributes. *Workbench* Self-Service users now have access to the Edit req form screen, which has the following fields:

- Database title – the name of the field in the database.

- Display title – the form's actual title.

- Req URL – the user designates whether the req template is to be accessed as a separate URL outside the system, if it will be freestanding, or requested by e-mail.

- Authorized IP address – this field lists any IP addresses that are authorized to access the freestanding URL or request by e-mail URL.

- Approval process – designates if an approval process is required for the req.

- Org groups with access – any org groups selected for this field have access to the req.

The two fields on this screen that pertain to the e-mail feature are:

- Auto-send e-mail to candidates in folder – first, an e-mail template is selected from the dropdown, then All or Specific candidate types (selected from a List box) are chosen to receive an e-mail when they are filed to the req folder.

- Auto-send e-mail to candidates in req folder by HR status – first, an HR status is selected, then an e-mail template is chosen, and finally, All or Specific candidate types (selected from a List box) are selected to receive the e-mail when they are in the req folder with the defined HR status.

If e-mails need to be sent for multiple HR statuses, the user clicks the plus sign Add icon, and additional entries for e-mail templates appear. To remove an e-mail sent for a specific HR status, the trash can Delete icon is clicked.

Enterprise – Minor Enhancements

Link to BrassRing automated approval tool

Overview of functionality

Enterprise users now have a link to BrassRing's automated approval tool on the Edit Talent Gateways options page. The automated approval tool is an easy to use, intuitive interface for editing, managing, and posting reqs to external job boards.

The link to BrassRing's automated approval tool is in the posting interface options section of the Talent Gateway Options screen in *Enterprise*. When the link is clicked, the user is presented with the automated approval posting screen pre-populated with the req's information.

Benefits

The link to BrassRing's automated approval tool makes it easier for users to manage their external job board req postings.

New functionality or replacement

This is new functionality.

Overview of implementation

Access to the BrassRing's automated approval tool link is controlled by the "BRLabs Community Gateway Post" user type privilege in the Integration section of the user privileges.

Implementation decisions

Clients should decide which users they want to have access to BrassRing's automated approval tool.

Talent Record opens to Resume/CV

The Talent Record can be set to open to the candidate's resume/CV by default, instead of the candidate information overview. If the functionality is turned on, the Original date loaded and the most recent version of the resume/CV are displayed as text in the Overview section, above the Overview summary. The resume/CV displayed follows existing security restrictions based on user type privilege.

This functionality is enabled on a per-client basis by an Implementation Consultant. Please contact your BrassRing representative for more information.

Assessment invitation enhancement

The invitation to candidates to take an assessment test has been redesigned, moved into a more prominent position at the beginning of the Confirmation page. The invitation text is also now configurable in *Workbench* and from the Admin+ screen of *Enterprise*.

This feature relates only to BrassRing's integration with ePredix. It does not necessarily affect any proposed future assessment integration projects. Only clients using the ePredix integration will notice a change.

This feature became available in July of 2005.

Multiple final HR statuses to auto-close reqs

For companies that use tracking logic, multiple final HR statuses can now be used to automatically close a req. This feature give clients whose divisions have different business processes the flexibility to meet their various needs.

The final HR statuses that automatically close a req are configured by an Implementation Consultant. Please contact your BrassRing representative for more information.

Canadian French support

Release 8 of *Enterprise* now supports Canadian French. Please contact your BrassRing representative for more information.

Gateway Questionnaires

Overview of functionality

Talent Gateways now allow clients to choose different, job-specific, fully customizable application processes for each req on each gateway. Gateway Questionnaires can be as simple or detailed as the client wants, so they are appropriate even for candidates with minimal computer experience who don't have a resume. A login is not needed for candidates to fill out a Gateway Questionnaire. Gateway Questionnaires can include:

- Question branching (the ability to redirect applicants to an additional or alternative set of questions based on their response to a previous question)

- Knock out questions (the ability to end the application process for a candidate providing an eliminatory answer to a question)

- Grids (a common grid question would be an availability grid, with days of the week as columns and work shifts as rows; this functionality is not limited to Gateway Questionnaires and can be used in any Talent Gateway application)

- Scoring (with current functionality)

- Optional resume/CV upload (typing and copying the resume are also submission options)

- The ability to include candidate form fields from multiple sources and columns

- A cover letter, Education, Experience, and Attachments can all be made required (all of which are optional on Talent Gateways)

The Gateway Questionnaires can be specific to each req, or a single Gateway Questionnaire could be used for all of an organization's reqs. They are appropriate for both hourly and salaried positions. To support a broader spectrum of hiring lifecycle tasks, Gateway Questionnaires can also include additional steps like assessment and pre-screening, background check data collection, EEO data collection, and work opportunity tax credit management.

If the Talent Gateway is so configured, candidates can use a Gateway Questionnaire to apply to an organization without submitting to a specific job by clicking the general apply link. The text on the link and the text for the link description are customizable. For example, the link could be "Submit General Gateway Questionnaire" for a jobless application using a Gateway Questionnaire, or "Submit resume/CV" for a traditional jobless application.

Candidate Experience

Logging in and saving drafts

Candidates are not required to create a Talent Gateway profile or to login to fill out a Gateway Questionnaire. However, the creation of a Talent Gateway profile or logging in is

required to save an incomplete Gateway Questionnaire as a draft if the Saved drafts feature is enabled for the Talent Gateway. The ability to save a draft is available for Gateway Questionnaires only when the Saved drafts feature is enabled for both the Full Talent Gateway and Gateway Questionnaire, and only when the user is logged in. The candidate can save a draft from any page where the client has enabled the Save button. Users that are not logged in will not see the "Save as draft" button, and will not have the ability to save a Gateway Questionnaire as a draft.

The Gateway Questionnaire draft is saved by default for 30 days from the day of its creation. However, the client can configure the number of days the Gateway Questionnaire draft can be saved from 1 to 30 days. Gateway Questionnaires saved via Save as draft are accessible from the existing Talent Gateway profile "Saved drafts" area. If a Gateway Questionnaire has been replaced since it was saved as a draft, the client determines what happens when the candidate re-accesses the draft: the candidate may be presented with the new Gateway Questionnaire, he or she may continue with the old Gateway Questionnaire, or be presented with the traditional Talent Gateways apply.

For all Gateway Questionnaire submissions that are not saved as drafts, the extracted Talent Gateway profile information is updated in real time each time the next page in the Questionnaire is accessed. If a logged in candidate completes more than one Gateway Questionnaire form in succession within the same Talent Gateway session, all contact information, resume/CV, education, and experience fields will pre-populate the successive Gateway Questionnaire forms. The same information is pre-populated if the logged in candidate applies to a traditional Talent Gateway job first, and then fills out a Gateway Questionnaire.

Job submissions and selected jobs

The View submissions section of the Resume/CV and cover letter manager screen includes all jobs applied to via Gateway Questionnaire for both resumes/CVs and cover letters. Candidates have the ability to submit a resume/CV, a cover letter, and attachments along with the Gateway Questionnaire.

The Selected jobs page displays jobs that the candidate has selected, similar to search results. However, the Selected jobs page has three additional columns for Release 8:

- Job type – either Hourly or Salaried. Generally, jobs with Gateway Questionnaires are Hourly, and jobs without them are salaried. However, the labels "Hourly" and "Salaried" can be changed, since salaried jobs can have a Gateway Questionnaire.

- Apply – the Apply link allows the candidate to apply individually to the job.

- Apply to group – the Apply to group link allows the candidate to apply for several similar jobs simultaneously.

Jobs with the same Gateways Questionnaires are grouped together, allowing the candidate to use the "Apply to group" column to apply to all jobs in the group. Additionally, the jobs without a Gateway Questionnaire are grouped together, and candidates can use the Apply to group link for those as well. Jobs with Gateway Questionnaires that are not the same will not

be grouped together. The column headers on the Selected jobs page are not hyperlinked, so candidates cannot sort already grouped job listings.

After each job submission is completed, the user is returned to the Selected jobs page, regardless of the gateway's "Candidate remains logged on" setting. When all jobs are completed, the user is either logged out or remains logged in according to the Talent Gateway setting.

Benefits

With Gateway Questionnaires, every job can have its own custom workflow. Features such as grids are specifically designed to support hourly recruiting, and the system gives recruiters access to candidates who might not normally apply through a Talent Gateway:

- Candidates who do not have (or want) an e-mail address

- Candidates who do not have a resume/CV

- Candidates who are not experienced computer users

- Candidates who may not have at-home internet access (kiosk recruiting)

Finally, Gateway Questionnaires provide a unified solution with the rest of the *Enterprise* application: they feature the same multilingual support and tight security, and reporting works seamlessly.

Recruiter Experience - Gateway Questionnaire Association

The new Gateway Questionnaire feature can be used for a job req's Talent Gateway posting(s). Any active Gateway Questionnaire can also be designated for a req that is imported via Req Import and is directly auto posted to Talent Gateways. The Gateway Questionnaire is an online application with question branching and knockout questions that candidates can complete quickly and easily. Gateway Questionnaires are most commonly associated with hourly positions. For more complete information on the Gateway Questionnaire feature and its use in Talent Gateways, please see the Talent Gateways Release Notes.

The Talent Gateways options page has a new field for Platinum level Gateways, "Select Gateway Questionnaire". The field's dropdown displays all Gateway Questionnaires available for use. Users select a Gateway Questionnaire from the dropdown, which then gets posted with the req.

Unless job code default data has pre-identified a Gateway Questionnaire to be associated with a req, the default value of a Gateway Questionnaire dropdown is "None." There is also a button on the screen called "Reset Gateway Questionnaire(s) to default" that, when clicked, resets the selected Gateway Questionnaire to the default value. If multiple sites are selected when the button is clicked, all selected sites will be reset to their initial default values. The default value could be "None" if a Gateway Questionnaire has not been selected.

For a Global Talent Gateway, a Gateway Questionnaire needs to be translated into at least the default locale (or language) of the Global Talent Gateway to be associated with a Req and Talent Gateway. Otherwise, the Gateway Questionnaire will not appear for selection in the "Select Gateway Questionnaire" drop down list. In addition, the req must exist in at least one language shared by the Global Talent Gateway and Gateway Questionnaire for it to appear as selectable.

The translated Gateway Questionnaire of the default Global Talent Gateway language only will be listed in the "Select Gateway Questionnaire" field. However, all the languages in which the Gateway Questionnaire is available for that Global Talent Gateway will be listed (in the default language of the Global Talent Gateway) next to the default Gateway Questionnaire. For example: Retail Sales (English, French, Spanish, German).

If a Gateway Questionnaire does not exist in a translated language of a Global Talent Gateway, the translated req missing a translated Gateway Questionnaire will default to a traditional Global Talent Gateway apply using the appropriate translated Talent Gateway site questions, if any.

When a Gateway Questionnaire is associated with a req's Talent Gateway posting, the "Highest possible score" field on Talent Gateway site questions page is the Gateway Questionnaire's highest score as defined in *Workbench*.

All Gateway Questionnaire responses for Gateway Questionnaires attached to a req appear in *Enterprise* as a Gateway Questionnaire Job Response form. The Gateway Questionnaire score total for a Gateway Questionnaire attached to a req appears in *Enterprise* on the Gateway Questionnaire Job Response form as a Gateway score, and can also be viewed within a req folder via the existing req folder output field "TG Score" functionality. The score that is viewable in the req folder is the candidate's most recent Gateway Questionnaire. When displaying Gateway Questionnaire answers, all candidate form and form field user type privileges are respected by *Enterprise*. By default, users can search on the Contact information fields, Education, Experience, Resume and Cover letter. However, all candidate form questions that can be included on the Gateway Questionnaire response form can be configured in *Workbench* to be searchable. The exception is attachments, which are not searchable.

In the Gateway Questionnaire Job Response form and Gateway Questionnaire Response form, each new Gateway Questionnaire section is separated by a section header. For all sections that contain question or resume widgets, the header appears whether or not an answer was provided for that specific section. However, the questions and answers will not appear for a section the candidate did not encounter. The questions and responses appear in the order in which they are listed on the Gateway Questionnaire except for the cover letter and resume/CV, which always appear together at the top of the form. The Gateway Questionnaire Job Response form and Gateway Questionnaire Response form can be eLinked to view, per existing *Enterprise* user privileges.

Gateway Questionnaire data can be exported via existing DEW functionality. For example, contact information, Gateway questions, and candidate form data are already available for export via DEW; no special user functionality needs to be added to receive "Gateway Questionnaire" content for these types of information. In addition, availability grid data can be exported.

The candidate Search screen gives *Enterprise* users the option to search on Grids completed in the Gateway Questionnaire. *Enterprise* users must add the Grid to the Search screen to be able to search based on availability. Grid search results display only the most recent availability grid data for a candidate.

Benefits

The new customized online application forms allow recruiters access to candidates who might not normally apply through a Talent Gateway.

New functionality or replacement

This is new functionality.

New terminology

Term	Definition
Gateway Questionnaire	An online job application, associated with specific reqs (often hourly) that has question branching and knockout questions and can include questions from multiple form sources.
Grid	A configurable checkbox grid of rows and columns. A common use of the Grid is for candidates to select their work availability for all days of the week, for any shifts.
Question branching	The ability to redirect applicants to an additional or alternative set of questions based on their response to a previous question.

Details/Limitations/Workarounds

Candidates can simultaneously apply to multiple positions with Gateway Questionnaires only if the positions have the same Gateway Questionnaire. Candidates cannot apply for multiple jobs when at least one of the jobs follows the traditional Talent Gateway application process and at least one of the jobs has an associated Gateway Questionnaire.

A logged in user cannot delete a resume/CV saved in Resume/CV manager while the resume is associated with a draft Gateway Questionnaire.

Because all of the Gateway Questionnaire button names are customizable, and a generic file would be inaccurate, BrassRing is not supplying candidate help files for Gateway Questionnaires. It is recommended that clients build their own help files.

Overview of implementation

The Gateway Questionnaire is available on full Talent Gateway of any subtype, and is only available to Platinum service level. Gateway Questionnaires are unavailable for use on Basic Gateways. For a job application that passes a Full Talent Gateway req to a Basic Talent Gateway, candidates will have the ability to use a Gateway Questionnaire on that Basic Talent Gateway. The Gateway Questionnaire will inherit the Basic Talent Gateway settings.

Gateway Questionnaires can be localized (translated). Organizations have the ability to localize/translate a Gateway Questionnaire in any or all languages the req and/or Global

Talent Gateway is attached to. For a Global Talent Gateway, a translated req missing its corresponding translated Gateway Questionnaire defaults to the standard Global Talent Gateway application process using the site questions translated in the language of the req, if any. Gateway Questionnaire forms can be displayed and completed only in the language of the Gateway in which the candidate is accessing the Gateway Questionnaire.

If auto-extraction is turned on for both the Talent Gateway and the Gateway Questionnaire, and either Resume Upload or Cut & Post functionality is used within the Gateway Questionnaire, the Gateway Questionnaire will extract appropriate contact information. If auto-extraction is not turned on for the Talent Gateway, and either Resume Upload or Cut & Post functionality is used within the Gateway Questionnaire, the Gateway Questionnaire will not extract the contact information.

If a req associated with a Gateway Questionnaire has been edited since the time a candidate saved the Gateway Questionnaire as a draft, when the candidate attempts to re-access the saved Gateway Questionnaire draft, the job details available for review on the "Saved drafts" page are updated and the saved Gateway Questionnaire draft remains unchanged. If a req has expired or has been removed since the candidate saved the draft, the job details are no longer available, and the candidate is notified of the removal.

Hot candidate notifications are sent and ePredix links will display for Gateway Questionnaires attached to reqs only. Hot candidate notification will not be sent and ePredix links will not display for Gateway Questionnaires that are part of the stand-alone application process. Hot candidate e-mail and ePredix links follow the threshold scores set per req in *Enterprise*.

The privacy policy can be implemented anywhere within the Gateway Questionnaire (for example, on the first page as a required question, or following a branching question asking what country the candidate lives in). Privacy policy settings already in place will not apply to the Gateway Questionnaire.

Each Gateway Questionnaire is associated with an org group. The Talent Gateway org group access restrictions supersede the Gateway Questionnaire org group access restrictions.

When a Gateway Questionnaire is associated with a req's Talent Gateway posting, the "Add new question" section and all pre-selected questions and their icons on Edit site questions page for that Talent Gateway are disabled.

Appropriately-privileged *Enterprise* users have the ability to select a Gateway Questionnaire to be used as the application process for a req. *Enterprise* users who do not have the new user type privilege will be able to view but not edit the "Select Gateway Questionnaire" Talent Gateway option field.

All candidate form fields completed within a Gateway Questionnaire automatically create the corresponding candidate form fields within *Enterprise*.

Implementation decisions

Clients should decide which reqs and Talent Gateways need Gateway Questionnaires associated with them, and what the Questionnaires should ask.

Timeframe of Implementation

Clients can contact their BrassRing representative after Release 8 to discuss becoming certified to build their own Gateway Questionnaires.

Cost

There is a cost for the implementation of a Gateway Questionnaire. Please contact your BrassRing representative for more information.

Gateway Questionnaire Configuration

Enterprise users require the Gateway Questionnaire privilege located in the Talent Gateways privileges section of the user type privileges page. The new setting is called "Select / deselect Gateway Questionnaire," and is unchecked by default for all user types for existing and new clients.

Gateway Questionnaires are built in *Workbench* by users who have attended the special Gateway Questionnaire builder class. The tool used to build the Gateway Questionnaires is located in Tools > Gateway Questionnaires, a new menu item between Talent Gateways and Agency Managers. Selecting the Gateway Questionnaire menu item displays the Gateway Questionnaire list screen. The menu will always appear, but no options will be available until the client setting has been enabled.

Data is defined at four levels for Gateway Questionnaires. First, Gateway-Questionnaire-wide settings are defined, such as how long a draft is saved, and the header and footer. Next, section-level data is defined, including button settings. The name of the section appears in the Progress bar. Third, pages are created in a section. Finally, widgets are created in pages. Widgets can include graphics, text, and questions. Multiple widgets can exist on a page.

When a Gateway Questionnaire is first created, it exists as a draft. Users can preview to check for errors and see what the Gateway Questionnaire looks like. Once the Gateway Questionnaire is set, the Activate process is run, which performs a final error check, finalizes the rendering, and makes the Gateway Questionnaire available to be associated with reqs. To ensure the integrity of the application process, once the Gateway Questionnaire is active, it cannot be changed. However, a copy of it can be made, and the copy can be edited.

When a Gateway Questionnaire is no longer of use, it can be inactivated. Inactive Gateway Questionnaires can be reactivated. Reactivation is different from running the activate process, as reactivation does not re-run an error check or generate a new rendering of the Gateway Questionnaire.

Gateway Questionnaire list screen

The Gateway Questionnaire list screen has a View controls section under the standard header. The View controls section lists the three possible statuses a Gateway Questionnaire can have in addition to an All view, and, when selected, how many Gateway Questionnaires exist in each status. When a View control link is clicked, the Gateway Questionnaires of that status display below the View controls section. The links are:

- Draft questionnaires

- Active questionnaires

- Inactive questionnaires

- All questionnaires (displays Gateway Questionnaires of all statuses)

The Actions toolbar options change based on which View is selected.

Actions toolbar item	Functionality	Gateway Questionnaire statuses available
Add new Gateway Questionnaire	Opens a blank instance of the Gateway Questionnaire Properties screen. This action has no effect upon any Gateway Questionnaire that is selected.	Draft, Active, Inactive, All
Save Gateway Questionnaire as new	Requests a name for the new Gateway Questionnaire, then assigns that name to a copy of the selected Gateway Questionnaire.	Draft, Active, Inactive, All
Translate Gateway Questionnaire names	Launches a page to translate Gateway Questionnaire names. This option appears only if the client is an international client.	Draft
Activate Gateway Questionnaire	Launches the Activate Gateway Questionnaire process.	Draft
Update Gateway Questionnaire associations	Launches the Remove Gateway Questionnaire from requisitions screen in a new window.	Active
Inactivate Gateway Questionnaire	Changes the status of the selected Gateway Questionnaire to Inactive. This action works only for Gateway Questionnaires that are not associated with any job postings or Talent Gateways.	Active
Reactivate Gateway Questionnaire	Changes the status of the selected Gateway Questionnaire to Active. This selection does not re-run the activation process; it reuses the old rendering.	Inactive
Delete Gateway Questionnaire	Deletes the selected Gateway Questionnaire.	Draft

For each Gateway Questionnaire, the following columns are displayed:

- Select – a radiobutton is used to select the Gateway Questionnaire to take action on.

- Name – the name of the Gateway Questionnaire.

- Status – the status of the Gateway Questionnaire. This column appears only if the view control is set to All questionnaires.

- Last updated – displays date of last time the Gateway Questionnaire was saved/changed.

- Edit properties – a pencil icon that, when clicked, launches the Gateway Questionnaire properties screen in a new window. This column appears only if the view control is set to Draft questionnaires.

- View properties – a binoculars icon that, when clicked, launches the Gateway Questionnaire properties screen in view mode in a new window.

- Administer sections/pages – a window icon that, when clicked, opens the Section/Page list screen. This column appears only if the view control is set to Draft.

- View sections/pages – a binoculars icon that, when clicked, launches the Section/Page list screen in view mode.

- Preview – the preview icon that, when clicked, launches a new window and displays the Gateway Questionnaire's Preview selection criteria screen (or error message, if the most recent rendering failed). In the Preview criteria screen, the user makes selections including language, single-req apply, and logged in status, and then clicks the Preview button to see the Gateway Questionnaire's rendering.

The Gateway Questionnaire properties screen is used to configure the basics of the Gateway Questionnaire. It has three tabs: General, Header, and Footer. A common use for the Header would be to display the client's logo, while the footer could link to Gateway Questionnaire-specific help or the organization's privacy policy. The following table displays the fields available on each tab.

Tab	Field	Field type	Functionality details
General	Gateway Questionnaire name	Textbox. Required.	The name of the Gateway Questionnaire. Must be unique.
General	Default window size	Radiobutton.	Defines the size of the window. Three options: "Maximized" (default), "974 by 718 pixels," and "750 by 550 pixels."
General	Days a Gateway Questionnaire is available after being saved as draft	Dropdown list, with values from 1 to 30.	Defines the number of days a Gateway Questionnaire is available after being saved as a draft. If login is not enabled on a particular Talent Gateway or if this Gateway Questionnaire is not set to display the Save button on any section, then this functionality does not work.
General	Suggest login for candidates who haven't logged in?	Checkbox, selected by default	Defines whether the Gateway Questionnaire will suggest candidates log in. If login is not enabled on a particular Talent Gateway, this functionality does not work for that gateway.

Tab	Field	Field type	Functionality details
General	Display asterisks for required fields?	Checkbox, selected by default	Defines whether required fields on the Gateway Questionnaire are denoted with an asterisk.
General	Allow auto-extraction if Talent Gateway allows it?	Checkbox, selected by default	If this setting is checked and also enabled on the Talent Gateway in which it is being accessed, then auto-extraction will work for first-time resume submissions as it does for a Talent Gateway.
General	Org groups with access	Multi-select list.	Defines which org groups have access to select the Gateway Questionnaire for job postings. The default is to have all org groups selected.
Header	Display header?	Radiobutton with Yes or No choices.	Defines whether the header is displayed. The default value is No.
Header	Height of header in pixels	Number field. Required if the header is displayed.	Possible values are integers between 0 and 200, with 30 as the default. One line of text is approximately 15 pixels high.
Header	Header for either stand-alone or for multiple requisitions at once	Textbox and Preview button	Header text Standard-sized text area that allows many HTML commands. The preview button Launches a window showing how the text will be displayed (including HTML).
Header	Copy header text <down arrow>	Textbox	Fills in the header-for-single-req text with the header-for-multiple-reqs text.
Header	Copy header text <up arrow>	Textbox	Fills in the header-for-multiple-reqs text with the header-for-single-req text.
Header	Header for a single requisition	Textbox	The header's text contents. An Insert variable button launches a token picker, with the following variables available: Job description Job location/division Job title Requisition ID – depending on the client setting, this either pulls in the AutoReqID, the Req ID, or the combined AutoReqID/Req ID.

Tab	Field	Field type	Functionality details
			Tokens can also be typed in by enclosing the name in brackets: "[" and "]". The name and case must match exactly.
Footer	Display footer?	Radiobutton with Yes or No choices.	Defines whether the footer is displayed. The default value is No.
Footer	Height of footer in pixels	Number field. Required if the footer is displayed.	Possible values are integers between 0 and 200, with 30 as the default. One line of text is approximately 15 pixels high.
Footer	Footer for either stand-alone or for multiple requisitions at once	Textbox and Preview button	Footer text. Standard-sized text area that allows many HTML commands. The preview button Launches a window showing how the text will be displayed (including HTML).
Footer	Copy footer text \<down arrow>	Textbox	Fills in the footer-for-single-req text with the footer-for-multiple-reqs text.
Footer	Copy footer text \<up arrow>	Textbox	Fills in the footer-for-multiple-reqs text with the footer-for-single-req text.
Footer	Footer for a single requisition	Textbox	The footer's text contents. An Insert variable button launches a token picker, with the following variables available: Job description Job location/division Job title Requisition ID – depending on the client setting, this either pulls in the AutoReqID, the Req ID, or the combined AutoReqID/Req ID. Tokens can also be typed in by enclosing the name in brackets: "[" and "]". The name and case must match exactly.

Please note that all textarea options for Gateway Questionnaires, including Header, Footer, and Text-type widgets, have Copy down and Copy up buttons. The Copy up and Copy down buttons allow for easy duplication of text between multiple-req/standalone texts and single-req texts.

Once the properties (Header, Footer, and General) have been established and saved for the Gateway Questionnaire, its sections and questions can be created. To do so, the user clicks

the Administer sections/pages icon in the Gateway Questionnaire list screen, which is available for Gateway Questionnaires in draft status only.

Section and page list screen

Gateway Questionnaires are composed of sections, which contain pages. For example, there might be a section on Contact information, with one page for required contact information, and another page requesting voluntary contact information. Clicking on a section or page highlights it. Each section containing pages will have a "+" or "–" sign next to it. When clicked, the + expands the section's view, showing the pages it contains. Clicking the – hides the pages a section contains. The Section and page list screen has five Actions toolbar items:

- Add new section – opens the Section properties screen. The new section is created below the selected existing section, or, if this is the first section, at the top of the Sections page.

- Add new page – opens the Page properties screen. If a section is highlighted when the Add new page action is clicked, the new page is created as the first page in the section. If a page is highlighted when the Add new page action is clicked, the new page is created immediately following the highlighted page.

- Delete – deletes whatever is highlighted, the section or the page that has been selected.

- Show Gateway Questionnaire list, which returns the user to the Gateway Questionnaire list screen.

- Move up – moves whatever section or page is highlighted up one place in the Gateway Questionnaire's order.

- Move down – moves whatever section or page is highlighted down one place in the Gateway Questionnaire's order.

Each section and page has a View button, which is always displayed, and an Edit button that displays when the screen is in edit mode. Each page also has an Administer widgets and View widgets button (depending on if the Section and page list screen is displayed in edit or view mode), which allows the user to view edit the page widgets.

To add pages, sections must first be established. To add the first section, the user clicks the "Add new section" link in the Actions toolbar. If sections already exist, the user highlights the section after which he or she wants the new section to appear, and clicks the "Add new section" link in the Actions toolbar. Clicking Add new section opens the Section properties screen.

The Section properties screen has the following fields:

Functionality	Field name	Functionality details
General	Section name	The section must be given a unique name. Required textbox.
Progress bar	Display progress bar?	A checkbox that, when selected, displays the progress bar in the section.

Functionality	Field name	Functionality details
Progress bar	Section appears in progress bar?	A checkbox that, when selected, displays the current section in the progress bar. The "Display progress bar?" checkbox must be selected for this setting to be selected.
Previous button	Display button?	Checkbox that, when selected, displays a button on the Gateway Questionnaire's section that returns the user to the previous page he or she was viewing (which is not necessarily the page that precedes the current one on the Section and page list screen). Information from the current page is saved so that it may be redisplayed. Selected by default.
Previous button	Label	A textbox for the label of the previous button. Default value is "Previous."
Previous button	Tool tip	Textbox for displaying help about the button on mouseover. If there is no text specified, no tool tip is displayed.
Clear button	Display button?	Checkbox that, when selected, displays a button on the Gateway Questionnaire's section that resets all fields on the page to their default values. Selected by default.
Clear button	Label	A textbox for the label of the clear button. Default value is "Clear."
Clear button	Tool tip	Textbox for displaying help about the button on mouseover. If there is no text specified, no tool tip is displayed.
Close button	Display button?	Checkbox that, when selected, displays a button on the Gateway Questionnaire's section that prompts for confirmation (if such text exists; otherwise it skips this step), then closes the Gateway Questionnaire without saving any information. Selected by default.
Close button	Label	A textbox for the label of the close button. Default value is "Close."
Close button	Tool tip	Textbox for displaying help about the button on mouseover. If there is no text specified, no tool tip is displayed.
Close button	Confirmation text	Textbox for the dialogue presented to the user when he or she clicks the close button. The default value is "Please confirm that you wish to close this questionnaire without saving or submitting." Not required. If text is removed, then no confirmation prompt will appear to user who clicks Close.
Save button	Display button?	Checkbox that, when selected, displays the "Save as draft" button for logged in users only. Clicking the Save as draft button saves all entered data and displays the saved draft confirmation message, which replaces the contents of the Gateway Questionnaire window. Selected by default.

Functionality	Field name	Functionality details
Save button	Tool tip	Textbox for displaying help about the button on mouseover. If there is no text specified, no tool tip is displayed.
Next/Submit button	Display button?	Checkbox that, when selected, makes the button a "Submit" button (where the candidate data is submitted to *Enterprise* and the page progresses) instead of a "Next" button (where only the page progresses and no data is submitted). Unchecked by default.
Next/Submit button	Submit data when 'Next/Submit' is clicked?	Checkbox that, when selected, makes the button a "Submit" button instead of a "Next" button. Unchecked by default.
Next/Submit button	Label	A textbox for the label of the Next/Submit button. If "Submit data when 'Next/submit' is clicked?" is No, then default text is "Next." If "Submit data when 'Next/submit' is clicked?" is Yes, then default text is "Submit."
Next/Submit button	Tool tip	Textbox for displaying help about the button on mouseover. If there is no text specified, no tool tip is displayed.

Once sections have been created and named, the pages can be created for each section. Pages contain the Gateway Questionnaire's questions. To create a page in a section, the user highlights the appropriate section and clicks the "Add new page" link in the Section/Page list screen, which opens the Page properties screen.

Page properties

The Page properties screen has a field for naming the page (which is for internal use only, does not display to the candidate and is not translated), and a field for defining the destination of the page.

When selecting a destination for the page (the step that happens when the candidate clicks the Next button), there three choices:

Next page in Gateway Questionnaire – Default option, takes the candidate to whatever page comes next.

Any of the other Pages within the current section, listed by page name. Pages are listed in the order defined on the Section and page list.

Any of the other Sections within the Gateway Questionnaire, listed by section name. Sections are listed in the order defined on the Section and page list.

If the page's section has a Next or Submit button and there is a branch on the page, this "Destination" field is not selectable, and displays "Branch." If there is no Next or Submit button, then this "Destination" field is unavailable, and displays "None."

The page properties screen gives the user options to Save, Revert to saved, or to Cancel.

Administer widgets

The user has full control over the layout of the page; including the ability to define a grid (with one to five columns and an unlimited number of row) into which widgets can be placed. Widgets can include questions, text, graphics, and resume objects. The Administer widgets page has buttons to:

Show Gateway Questionnaire list, which returns the user to the Gateway Questionnaire list screen.

Administer sections/pages, which returns the user to the Section/page list screen.

The main area of the Administer widgets screen is a design space. The design space is composed of rows and columns, which are created using buttons in the Actions toolbar. (New pages contain one row and one column.) Each region of the design space can be populated with one widget. Regions are selected by clicking on them. Double clicking on a region brings up the Widget properties screen for that region.

The Administer widgets screen has the following Actions toolbar items:

- Add new widget – Displays a blank Widgets properties screen for the selected region.

- Edit widget – Displays the Widget Properties screen to edit the widget in the selected region. If the Gateway Questionnaire is in view mode (i.e., on the "View widgets" screen, rather than "Administer widgets"), this button says "View widget." In this case, all actions are in view mode (without any edit options).

- Cut widget – Removes the widget from the current region and stores it on the Gateway Questionnaire clipboard (limit 1; available for pasting within the same screen only).

- Paste widget – Inserts the widget stored in the clipboard into the selected region, and empties the clipboard.

- Delete widget – Removes the widget from the selected region.

- Add new row – Adds a row after the current row. The current row may be defined by a selected region, the border between regions, or anywhere in the Column Header. The added row has the same number of columns as the current row. If the current row has merged cells, so does the new row.

- Delete row – Deletes the selected row along with all its contents.

- Merge cells – Merges two regions (cells) in the same row.

- Unmerge cells – Unmerges the selected region into its component regions

- Add new column – Adds a new column after the selected column. The maximum number of columns is 5. A column header must be selected.

- Delete column – Deletes the selected column, along with all of its contents. A column header must be selected.

- Preview page – Presents a non-functioning preview of the page with widgets in a new browser window.

To insert a widget (such as a question), the user moves the mouse to the region of the screen where he or she wants to insert the question, and clicks it to highlight the position in the design space. Once the position within the design space is selected, the user clicks the Add new widget button, and the Widget properties screen appears. Double clicking the region also displays the Widget properties screen.

The Widget properties screen has four radiobuttons at the top, which are used to select what type of widget is being added: a Question, Text, Graphic, or Resume/CV. Selecting different widget types changes the display of the Widget properties screen. The following table details the different functionalities of the Widget properties screen.

Widget type	Field	Functionality details
Question	Question source	Dropdown list to select where the question is pulled from. Choices include Gateway form questions (default), Contact information fields, Code fields, and single-per-candidate and multiple-per-candidate forms.
Question	Question/Field/Code	List box listing all possible questions from the source selected. If "Contact information fields" was selected, the name of the field is "Field." If "Code fields" was selected, the name of the field is "Code."
Question	Question text display	This is a display-only field that lists either the full question text or the code type description.
Question	Widget class	Radiobutton to select the type of question:

Inherited – the question is required only if the underlying question is required. Default.

Required – The candidate must answer this question to continue.

Branching – Based upon what value the candidate selects, the next page destination will change. This option is available for single-select or radiobutton questions only. |
| Question | Scoring/Branching table | This table displays only if the question is scorable (i.e., for single-select, multi-select, radiobutton, or checkbox question types). In this case, the "Option" and "Score" columns appear. If it's a branching |

Widget type	Field	Functionality details
		question, then the "Branch destination" column also appears. In either case, there is a row for each field option. The Option column lists each possible option (answer to the question). The Score column lets the user define the score of the question, from 0-100. Notification thresholds are defined in *Enterprise*, not at the Gateway Questionnaire level. The Branch destination column lets the user choose where each possible option (answer) takes the candidate, either "Next page in Gateway Questionnaire," Pages within the current section, or Sections within the Gateway Questionnaire.
Question	Code values	Displays only if a code question is selected. User can choose one, multiple, or all codes.
Question	Codes display	Displays only if a code question is selected. Choices are "Display codes and description," "Display codes only," and "Display description only."
Question	Display option	Controls the relative position of the label and the control, and the orientation of radiobuttons and checkboxes. Options change depending on what type of question is asked.
Question	Obscure response?	If the question is obscurable and this checkbox is selected, the Gateway Questionnaire displays an asterisk for each character in the question's answer, regardless of what the user types. Useful for social security numbers in a kiosk environment.
Question	Bold	If checked, makes the question bold.
Question	Italics	If checked, makes the question italicized.
Question	Alignment	Defines the alignment of the question. 'Default' changes depending on what type of question is selected.
Text	Gateway Questionnaire that is for multiple requisitions at once	Text entered in this textbox displays for a Gateway Questionnaire for multiple reqs. Has a Preview button.
Text	Gateway Questionnaire for a single requisition	Text entered in this textbox displays for a Gateway Questionnaire for a single req. Has Insert variable and Preview buttons.
Text	Alignment	Defines the alignment of the graphic, Left (Default), Center, or Right.
Graphic	Insert a picture from URL	An option to insert a picture from a URL.

Widget type	Field	Functionality details
Graphic	Height in pixels	The height of the image in pixels. Integer between 0 and 999.
Graphic	Width in pixels	The width of the image in pixels. Integer between 0 and 999.
Graphic	Alternate text	Enter text to display in the event that the image does not load properly.
Graphic	Alignment	Defines the alignment of the graphic, Left (Default), Center, or Right.
Resume	Type	Several types of resume widgets are available: Resume upload (includes resume cut & post). Default. Resume cut & post Cover letter Attachments Education builder Experience builder
Resume	Optional/Required	Optional /Required toggle. If required is chosen, the system requires at least one in cases where multiple entries allowed at once [Attachments, Education, Experience].

Grids

Grids are a new question type. When a user is creating a Grid question, the save confirmation page displays the 'Administer grid' button. This opens a window in which rows and columns can be added. Rows and columns can be deleted only before they are saved. (Rows and columns can be inactivated at any time. A checkbox toggles the display of inactive rows and columns.) Rows and columns can also be moved up and down with the aid of arrow buttons.

A common use for a grid would be to build an availability matrix. For this, the user would create (name) rows and columns to represent periods of time. For example, a row might be named "Monday" with columns for each hour in the day.

Activating a Gateway Questionnaire

Once a Gateway Questionnaire has been built, and all sections and pages are complete, the user returns to the Gateway Questionnaire list screen. The user clicks the Preview button to make sure everything functions and appears correctly. When the preview is generated, if the Gateway Questionnaire fails to validate, the user is presented with the reason why (via e-mail and also through a pop-up window), and asked to fix it. It is recommended that Preview be used to check validation, but that is not required. Clicking "Activate Gateway Questionnaire" also performs validation.

Once the preview of the Gateway Questionnaire is validated, the user clicks the Activate Gateway Questionnaire link in the Actions toolbar. The Gateway Questionnaire activation status screen opens in a popup window, and is periodically refreshed to indicate the status. If the Gateway Questionnaire is valid, it is rendered and its status becomes Active.

Removing or Replacing a Gateway Questionnaire

Occasionally, a Gateway Questionnaire will have to be replaced, either because it is out of date or an error was discovered. In this case, the user might select the Gateway Questionnaire that will be replaced, and then select "Save Gateway Questionnaire as new" in the Actions toolbar. He or she then makes changes to the new Gateway Questionnaire and activates the new Gateway Questionnaire.

After following the above process, the user has a replacement Gateway Questionnaire that can be associated with reqs and Talent Gateways. If the outdated Gateway Questionnaire is associated only with a few reqs, it is easy to replace them manually. However, if there are many reqs, then the user can automate the replacement process by selecting the Gateway Questionnaire that will be replaced, and then running the "Remove Gateway Questionnaire from reqs" process in the Actions toolbar.

The selected Gateway Questionnaire is listed as the "Original Gateway Questionnaire." The system also shows the number of job postings (one req on three different Talent Gateways counts as three postings), as well as the number of associated Talent Gateways (for stand-alone job application processes). The user then selects a replacement, which can either be the standard Talent Gateway application process or another Gateway Questionnaire. The choices for replacement Gateway Questionnaires are active Gateway Questionnaires that are accessible by all the org groups that could access the original Gateway Questionnaire. The user also has the choice of erasing the candidates' draft applications and requiring them to use the replacement application process. If this box is not checked, then candidates with saved drafts will continue with their semi-complete Gateway Questionnaire. Once the parameters have been set in the Remove Gateway Questionnaire from reqs screen, the user clicks the "Remove" button.

Talent Gateways text customizations

There are a number of Talent Gateways text customizations that affect the Gateway Questionnaire. The following table details them:

Location	Functionality
Tools > Talent Gateway > Text Customization > Landing	When the setting for a general (Resume/CV) apply is enabled, the general apply link text defaults to "Submit resume/CV." For Gateway Questionnaires, the default text is "Submit Gateway Questionnaire." The Summary [default] text for this will change when Gateway Questionnaire is selected for the general apply.
Tools > Talent Gateways > Text Customization > Gateway Questionnaire login/create page > Gateway Questionnaire	Defines the Gateway Questionnaire log in page text when a Gateway Questionnaire is enabled. Default is "To log in or create an account is NOT required to fill out a Gateway Questionnaire. However, by creating an account or logging in you will be able to take advantage of features allowing you to

Location	Functionality
log in/create login intro text	save your incomplete Gateway Questionnaire, store your profile information and have access to more job seeker tools." When the Gateway Questionnaire functionality is disabled for the client, the "Gateway Questionnaire log in/create" tab will be hidden.
Tools > Talent Gateways > Text Customization > Selected jobs > Selected jobs intro text	If the Gateway Questionnaire is enabled, the Selected jobs tab appears. This field defines the introductory text displayed to Gateway Questionnaire users in the Selected jobs page. The default is: "You may apply to any job individually by clicking the "Apply" link next to that job. Whenever possible, jobs for which the application process is identical are grouped together. You may apply to a group of jobs by clicking on the "Apply to group" link, when available."
Tools > Talent Gateways > Text Customization > Selected jobs > Job type column header text	If the Job type column on the Selected jobs page is set to display, this field defines the name of the Job type column. Default is "Job type."
Tools > Talent Gateways > Text Customization > Selected jobs > Job with no Gateway Questionnaire display text	If the Job type column on the Selected jobs page is set to display, this field defines the text displayed for jobs without a Gateway Questionnaire. Default is "Hourly."
Tools > Talent Gateways > Text Customization > Selected jobs > Job with Gateway Questionnaire display text	If the Job type column on the Selected jobs page is set to display, this field defines the text displayed for jobs with a Gateway Questionnaire. Default is "Salary."
Tools > Talent Gateways > Text Customization > Selected jobs > Single apply column header text	Defines the header text of the column candidates select to apply to a single job on the Selected jobs page. Default is "Apply."
Tools > Talent Gateways > Text Customization > Selected jobs > Single apply link display text	Defines the text of the hyperlink candidates click on to apply to a single job on the Selected jobs page. Default is "Apply."
Tools > Talent Gateways > Text Customization > Selected jobs > Group apply column header text	Defines the header text of the column candidates select to apply to a group of jobs on the Selected jobs page. Default is "Group apply."
Tools > Talent Gateways > Text Customization > Selected jobs > Group apply link display text	Defines the text of the hyperlink candidates click on to apply to a group of jobs on the Selected jobs page. Default is "Apply to group."

Benefits

A user-friendly Gateway Questionnaire development tool allows the functionality to be provided for self-service users.

Details/Limitations/Workarounds

There can be only one branching question per page.

If a Gateway Questionnaire is translated into a language, all of its branching questions (and the field options) must be translated into that language. Everything that candidates see is translatable. For example, the Gateway Questionnaire name and section names are translatable, while page names are not.

If auto-extraction is enabled and a resume widget is included for the Gateway Questionnaire (regardless of the Talent Gateway setting), it must have all extractable fields in any path that leads to a submission.

If auto-extraction is enabled and a resume widget is included for the Gateway Questionnaire (regardless of the Talent Gateway setting), resume upload or resume Cut & Post must appear before the extractable fields in any path that leads to a submission.

Every page of the Gateway Questionnaire must have a way to continue: a Next, Close, or Submit button.

Any question with options included on the Gateway Questionnaire (single-select, multi-select, grid, radiobutton or checkbox) must have at least one option defined. Grids must have at least one row header and one column header.

The resume upload widget and the attachments widget cannot appear on a page with the Submit button.

If the State field is used, the Country field must be on the same page.

Implementation decisions

Gateway Questionnaires can be built and administered by Tier 2 certified *Workbench* users. Client must opt to have Gateway Questionnaires feature enabled.

Clients should decide which Talent Gateways they want to have Gateway Questionnaires, and what the questions should be.

Hide Candidates – User Type Privilege

A new privilege has been created that hides the entire Candidate menu from a specific *Enterprise* user type. In addition, the privilege allows the *Enterprise* user type to view req details only, and not view the associated req's candidates.

When users with this privilege access reqs from the Reqs menu as well as the Req quick search bar, the req folder column does not display for both My reqs and All Reqs.

If the new user type privilege is selected for a user type, all other Candidate action user privileges are disabled.

Benefits

Restricting access to candidate information ensures another level of security for organizations with candidate data restrictions.

New functionality or replacement

This is new functionality.

Details/Limitations/Workarounds

The intended use of this feature is to disallow the *Enterprise* user type to view any candidate information, as well as disallow the ability to add candidates and contacts. To ensure that candidate access is restricted for the user type, other privileges should not be given for Search, Candidate categorization, Admin, Integration, Reports, Communications, Admin+, Scheduling, Talent Gateway, Reports 2, and Candidate Actions 2.

Overview of implementation

The Hide all candidates user type privilege is available for use, and can be selected in *Workbench*.

Implementation decisions

Clients should decide which users they want to restrict access to candidates.

Workbench Configuration

The privilege is in the Candidate actions group in Tools > Users > User types, and is called "Hide all candidates." When users with this privilege access reqs from the Reqs menu as well as the Req quick search bar, the req folder column does not display for either My reqs or All Reqs.

If the new user type privilege is selected for a user type, all other Candidate action user privileges are disabled.

The intended use of this feature is to disallow the *Enterprise* user type to view any candidate information, as well as disallow the ability to add candidates and contacts. To ensure that candidate access is restricted for the user type, other privileges should not be given for Search, Candidate categorization, Admin, Integration, Reports, Communications, Admin+, Scheduling, Talent Gateway, Reports 2, and Candidate Actions 2.

Reports – Diversity Breakdown Standard Report

A new standard report, the Diversity breakdown report, has been created. It is accessed by navigating in Enterprise to Reports > Standard reports, and clicking on the Diversity Breakdown link in the System reports section of the page. The Diversity Breakdown report displays gender and race information broken down by job category. Users can select multiple data sources within Enterprise, allowing a single report to be used for multiple divisions, locations, and countries.

This report will allow the client to view Race and Gender information for candidates in all HR statuses.

The Diversity breakdown report has the following filters, some of which are determined based on each specific user's security privileges:

Filter	Description
Date range	**Date range** can be selected by using the dropdown lists or calendar, or by choosing one of the predefined options. Predefined options are based on calendar year. The date range can be one of the following: Month to date Previous calendar month Calendar quarter to date Previous quarter (for equivalent time period) Previous quarter (all) Calendar year to date Previous year (for equivalent time period) Previous year (all)
Location	Customizable field on the Req Form (location/division) also referred by some customers as Region, Division, etc. This filter is customizable by the client. In *Workbench*, this standard filter can be swapped out for another custom req field. Security is applied to this filter, so only users with access to this field on the req will see it as filter criteria.
Department	Customizable field on Req Form also referred by some customers as business unit, division, business acronym, etc. This filter is customizable by the client. In *Workbench*, this standard filter can be swapped out for another custom req field. Security is applied to this filter, so only users with access to this field on the req will see it as filter criteria.
Hiring manager	Derived from Req Form. This filter is customizable by the client. In *Workbench*, this standard filter can be swapped out for another custom

Filter	Description
	req field. Security is applied to this filter, so only users with access to this field on the req will see it as filter criteria.
Recruiter	Derived from Req Form. This filter is customizable by the client. In *Workbench*, this standard filter can be swapped out for another custom req field. Security is applied to this filter, so only users with access to this field on the req will see it as filter criteria.
Req ID	Refers to system generated req number, i.e. Auto-req number. Security is applied to this filter. The req list uses the My/All req viewing privileges, so if a user has only the View My open reqs privilege, the Req ID filter will contain only a list of his or her open reqs.
HR status	Represents client choices of HR status.

In addition to the listed filters, the user can select an output format.

The Diversity breakdown report results are listed by gender, and sub-divided by race/ethnicity for each job category. Job category is defined in *Workbench*. Candidates must be filed to a req to be associated with that job category. The total number of candidates in each gender/race combination for each job category is displayed in the corresponding column:

Column	Description
Job category	Displays a collection of standard Job categories: • Officials and Managers • Professionals • Technicians • Sales Workers • Office and Clerical • Craft Workers (Skilled) • Operatives (Semi-Skilled) • Laborers (Unskilled) • Service Workers
Overall total	The total number of candidates filed to reqs associated with the corresponding job category, excluding candidates with race or gender unknown.
Male: White (not of Hispanic origin)	Displays the number of males in a job category that identify themselves as White (not of Hispanic origin).

Column	Description
Male: Black (not of Hispanic origin)	Displays the number of males in a job category that identify themselves as Black (not of Hispanic origin).
Male: Hispanic	Displays the number of males in a job category that identify themselves as Hispanic.
Male: Asian or Pacific Islander	Displays the number of males in a job category that identify themselves as Asian or Pacific Islander.
Male: American Indian or Alaskan Native	Displays the number of males in a job category that identify themselves as American Indian or Alaskan Native.
Male: Race unknown	Displays the number of males in a job category whose race/ethnicity information is unavailable.
Female: White (not of Hispanic origin)	Displays the number of females in a job category that identify themselves as White (not of Hispanic origin).
Female: Black (not of Hispanic origin)	Displays the number of females in a job category that identify themselves as Black (not of Hispanic origin).
Female: Hispanic	Displays the number of females in a job category that identify themselves as Hispanic.
Female: Asian or Pacific Islander	Displays the number of females in a job category that identify themselves as Asian or Pacific Islander.
Female: American Indian or Alaskan Native	Displays the number of females in a job category that identify themselves as American Indian or Alaskan Native.
Female: Race unknown	Displays the number of females in a job category whose race/ethnicity information is unavailable.
Gender unknown	Displays the number of applicable candidates where gender information is not available. Candidates with gender unknown are not sorted by race.
Total	The total number of candidates of a gender/race combination that have been filed to a req.

Benefits

The Diversity breakdown report helps organizations better track their EEO status.

New functionality or replacement

This is new functionality.

Details/Limitations/Workarounds

Org group and req-level security are implemented in viewing Diversity breakdown filters and results.

Custom labels for Job categories, genders and races are not available. However, these labels will appear in all *Enterprise* translated languages.

A candidate is counted only once per distinct Gender/Race/Job category combination.

Gender information is derived from candidate form fields designated within the Gender report setting in *Workbench*.

Overview of implementation

The Diversity breakdown report is available with Release 8.

There are new user type privileges for the Diversity breakdown report.

Implementation decisions

The data sources for the Diversity breakdown report need to be determined. Clients will work with their Implementation Consultant to implement this report.

Workbench

The privilege to give users access to the new Diversity breakdown report within the Standard reports menu is located in the Reports privileges (Tools > Users > User types), and is called "System - Diversity breakdown."

Reports – Scheduling

With *Enterprise* 8, users have the option to schedule standard reports to run on an automatically recurring basis. With report scheduling, users can:

- Establish a schedule frequency, i.e. daily, weekly, monthly, etc.

- Establish a schedule duration.

- Establish a distribution list of users who will receive the report results.

For *Enterprise*-specific definitions of any of the above terms ("frequency," "duration," etc.) please see the "New terminology" part of this section.

A run and delivery time must be created for each scheduled report. Schedules may be of single-use or may recur. Schedule components include:

- Schedule description (described by the user)

- User-defined frequency

- Recurrence (described by Enterprise)

- Range of recurrence

Scheduling a report

On the filter page for all standard or custom-to-client reports, a new "Schedule report" button appears. When a user clicks the "Schedule report" button, he or she will be presented with the Schedule report popup window. In this window, the user can perform the following activities:

- Enter a description for the schedule

- Set a frequency (Once, Daily, Weekly, etc…)

- Set a recurrence pattern (every <n> weeks on Friday, etc…)

- Set a recurrence range (Start date – End date)

- Set a distribution e-mail list (To, Subject, Message)

The following options exist for each selected scheduling option:

Frequency	Recurrence options
Once	The user selects a Run date.
Daily	The user selects to run:

	• On the following days (Monday, Tuesday, Wednesday, etc.). Multiple days can be selected. • Recur after this number of days (user selects an integer). • Every weekday.
Weekly	The user must select: • Run after X number of weeks, where X is the selected integer. • The weekday(s) on which to run the report.
Monthly	The user can select • Months (multiple months can be selected). • On which week of the month to run the report (first, second, etc). • On which day of the selected week to run the report (Monday, Tuesday, etc.). Multiple days can be selected. • Specific calendar days on which to run the report. Multiple days can be selected, though they must be comma separated (for example, 1,3,5-12).

For each frequency other than Once, the Range of recurrence options are Start date, No end date, and End date.

Report results

When the scheduled report is complete, an e-mail is sent according to the criteria selected for the distribution list. The message text contains report criteria, as well as an embedded URL that will launch either report results or an expiration notice if the results are more than 14 days old.

The results eLink is not driven by a client's eLink settings for expiration. The link itself does not expire, but the results are invalid after 14 days, as per current functionality. If a report has expired, clicking the "Download report" link in the e-mail received by the user states that "Report results are no longer available."

When the user opens the report results e-mail, he or she will view the following information within a popup browser window:

• Report name

• Whom it was scheduled by

• Schedule description

• Format

- Frequency

- Report criteria

- Last run date

- Next run date

- Sender's message

From within the results e-mail, the user can click on the "Download report" icon to view the results in the pre-selected format.

Scheduling frequencies and the Reports Queue

For users with permission to use reports scheduling, the Reports Queue now contains a "Frequency" column. Users can sort by Report name, Frequency, Last run date, and Next run date columns.

The Reports Queue has the following Actions toolbar items:

- Edit report schedule

- Suspend scheduled report

- Restart suspended report

- Remove scheduled report

- View details

The "View details" Actions toolbar item, when clicked, opens a popup window containing information on:

- Report name

- Schedule description

- Format

- Frequency

- Range of recurrence

- Report criteria

- Whom it is distributed to

Best practice recommendations

The user is advised to compare the date range chosen on the reports filter page with the date range chosen when scheduling the report. For greatest flexibility of use, the system will not verify filtered dates against scheduled dates. The user must be careful not to schedule a report to run for a date range greater than the date range of the data being filtered, unless that is what he or she wants. For example, the user may have a business reason for wanting a report of data from Jan. 1 – Oct, 14 2004 to be delivered by e-mail on October 15, 2005.

Benefits

Reports scheduling gives *Enterprise* users the ability to run recurring reports without having to configure them every time. This frees up the user to use time more productively.

New functionality or replacement

This is new functionality.

New terminology

Term	Definition
Distribution list or distribution email list	An e-mail template used to send the desired report to pre-selected recipients. The recipient list, subject line, and message text are written by the user. Default text is also provided for the subject line and message text.
Frequency	The number of times a report occurs within a specified range of recurrence. A frequency may be specific to a given report, or may be available for the user to re-use among many reports Choices include: • Once • Daily • Weekly • Monthly
Report	A standard, or custom-to-client, data retrieval request. Report components include: • Date range • Filtering options • Output format
Report statuses	Report statuses are those listed in the Reports Queue, indicating the condition of a specific report. Statuses are: • **Completed** – report has completed its latest run • **Failed** – report experienced an error while running

Term	Definition
	• **Running** – report is generating at that moment • **Scheduled** – report was scheduled to run at a time later than the date it was filtered • **Suspended** – next run of this report has been interrupted indefinitely • **Invalid** – report with an invalid date range (i.e. it will never run with the selected parameters) • **Blank –** an unspecified error occurred. Please call Product Support.
Reports privileges	The set of user access privileges associated with the *Enterprise* Reports Module. A user will automatically obtain the scheduling functionality for any report(s) he or she can access. A user must have privileged access to the Reports Queue. A user will see only reports he or she has personally scheduled within the Reports Queue.
Schedule	A run and delivery time for a report. Schedules may be of single use or may recur. Schedule components include: • Schedule description (described by the user) • User-defined frequency • Recurrence (described by the system) • Range of recurrence
Subscriber	A member of an e-mail distribution list for reports scheduling.

Details/Limitations/Workarounds

For the initial release of reports scheduling, the Req status summary and HR action activity reports cannot be scheduled.

When scheduling a report, the start date cannot be the same day as the current day. Reports must be scheduled at least one day in the future.

Users should not use keyboard shortcuts or browser commands.

A report is considered invalid if the end date for the report occurs before the report can be run.

The output formats .xml and .csv cannot be scheduled for any report.

Overview of implementation

Users will automatically obtain reports scheduling functionality for any report(s) they can access. In addition, a user must have the privilege to access the Reports Queue.

Reports – Standard Report Enhancements

Additions and modifications made to standard reports in *Enterprise* for Release 8 include:

- Multiple "Hired" statuses are now included within several existing standard reports.

- The "Refine report criteria" link on all standard and custom reports has been renamed.

Multiple "Hired" statuses

Previously, standard reports allowed users to report on one "Hired" status only, even if multiple existed. Now, multiple Hired statuses can be specified for standard reports, which is useful for organizations that use different hired statuses for different divisions or hiring processes.

The following table lists the affected reports, and how they have changed with the new functionality.

Report	Functionality change
New hire report	All candidates with all statuses designated as Hired are returned in the report results.
Req status summary report	The Positions hired column counts all candidates with all Hired statuses for a specific req.
Cost per hire report	Calculates cost based on all Hired statuses.
Agency scorecard	The Referrals hired column reflects all candidates of all Hired statuses for the agency code.
Diversity hires report	Reports on all candidates with all Hired statuses.
Source yield report	The Total hired and % Total hired columns calculate all candidates of all Hired statuses.
Time to fill report	Calculates the time to fill a position based on any of the Hired statuses.

Refine report criteria link

The "Refine report criteria" link has been renamed to more accurately reflect its functionality. The link now displays as "Return to filter page."

Benefits

Multiple Hired statuses allow clients with multiple HR status workflows to capture information for all Hired candidates within the existing standard reports.

New functionality or replacement

This is new functionality.

Details/Limitations/Workarounds

For the standard reports listed above, the action date for the "Hired" action is taken into consideration. For candidates that may have more than one "Hired" status taken during a selected timeframe per req or code, the reports look at the oldest action date present for the candidate.

Overview of implementation

The new hired statuses and Return to filter page link are available with Release 8.

Implementation decisions

Clients should decide if they want to implement multiple Hired statuses, and what they should be.

Reports – Talent Comparison Summary Report

The new the Talent comparison summary report gives *Enterprise* users the ability to compare up to five candidates at one time across a client-defined set of comparison criteria. The report is accessed by clicking the new "Talent comparison" Actions toolbar item, available when viewing req and working folders, Inboxes, or My candidates. *Enterprise* users must have access to req and working folders to use the Talent Comparison Summary report.

Fields used for comparison are set on a client-level, and cannot be customized for an individual user. Up to ten fields can be used to compare candidates. Fields used for comparison are selected from either general or client custom candidate form fields.

To run the report, users navigate to a req or working folder, their Inbox, or My candidates, and select the checkboxes associated with a minimum of two and a maximum of five candidates. They then click the "Talent comparison" link in the Actions toolbar, which launches the report.

The Talent comparison summary report's results appear as a grid, with selected fields broken down by candidate. The results can be exported to MS Excel. Reporting security restrictions apply to the viewable results.

Benefits

The Talent comparison summary enables users to compare a set of candidates across multiple pre-defined criteria with a single click. This report can be downloaded to Excel for easy sharing. Security is enforced as well, so the user executing the report sees only data to which they have access in *Enterprise*.

New functionality or replacement

This is new functionality.

Details/Limitations/Workarounds

It is recommended that sensitive candidate information, such as gender, race, age, etc. NOT be used as comparison criteria.

Candidates loaded into *Enterprise* are not available for the Talent comparison summary report until the day after they are loaded. For example, if a candidate is loaded to *Enterprise* on 4/15/05, that candidate is not available for reporting until 4/16/05.

Overview of implementation

The talent comparison report is available with Release 8.

There are new user type privileges for the Talent comparison report. In addition, users must also have access to working or req folders to access this report.

Implementation decisions

The Talent comparison summary comparison criteria need to be determined. Clients will work with their Implementation Consultant to implement this report.

Workbench

A new user type privilege is required to access the Talent comparison summary report. The new privilege is in the Reports 2 section of user type privileges (Tools > Users > User types), and is called "Talent comparison summary." If this privilege is checked, all users associated with this specific user type will see the "Talent Comparison" action within the Actions toolbar in working and req folders in *Enterprise*.

Reqs – Custom Req Field Editing Security

Custom req fields can now be restricted from being edited by specific *Enterprise* user types. If a user is editing a req that contains fields that he or she does not have permission to edit, the non-editable fields are still viewable.

Benefits

Restricting the req fields that *Enterprise* users can edit provides an additional layer of application security.

New functionality or replacement

This is new functionality.

Details/Limitations/Workarounds

This feature does not apply to the email or label field types.

Implementation decisions

Clients should decide if any req form fields need to be restricted, and from which users.

Workbench Configuration

Req field security by user type is set at the req template level. The *Workbench* user defines each field as being editable for specific user types by navigating to Tools > Forms > Req forms > Administer req fields > Edit field attributes. The Edit field attributes screen has a new field called "Non-editable for these user types." The field's options list all user types, though none are selected by default.

The non-editable field user type privilege applies to the following custom req field types:

- checkbox

- date

- multi-select

- numeric

- radiobutton

- single-select

- textbox

- text area

When a form is opened in edit mode by a user without the privilege to edit it, non-text fields display in view only mode, and text area fields display as non-editable fields with active scroll bars.

Talent Gateways – Customization Enhancements

Several new functionalities have been added to Talent Gateways to configure pages and candidate workflow to reflect more of an organization's branding.

All of the following customizations are performed in *Workbench*.

Welcome page naming

The Talent Gateway welcome page can be renamed so it is not confused with any of the organization's other (non-Gateways) welcome pages.

Configurable language names

Clients can now customize the appearance of language names on the Welcome and Search openings pages of Global Talent Gateways. For example, "International English" and "U.S. English" can be renames to "English (US jobs)" and "English (non-US jobs)."

As a best practice, two locales cannot be customized to have the same name, otherwise the customized language name will appear twice in the list of languages. In addition, there is a 255 character limit on language names.

Locale names can be customized in Workbench by navigating to Tools > Talent Gateways > Global > Locale customization.

Customizable Resume/CV Submission Page Titles

For Basic and Full Talent Gateways, clients can customize the name of the resume/CV submission page based on whether a candidate is submitting a resume/CV for a specific job (job apply) or submitting a resume/CV without applying for a specific job (resume/CV drop-off).

Differentiating the resume/CV submission page title between job applications and jobless submissions makes the Talent Gateways experience more complete.

Customized self-delete warning message

Organizations with Candidate self-delete enabled can now also customize the warning message displayed when a candidate attempts to delete his or her profile information. The new customization field appears on the **Edit profile** tab on the Text customization page, which is located by navigating to **Tools > Talent Gateways > Text customization**.

For existing Talent Gateways, the warning message textarea appears blank. However, the actual message text that the candidate sees is the system default, which has not changed. To view the default text, users click the Reset to default button.

Progress bar customization

A progress bar, which clearly details each step of the application process to the candidate, is now displayed horizontally at the top of each Talent Gateways screen. The progress bar replaces the cookie crumbs, which were used until Release 7.5 to display the candidate's place in the Talent Gateway experience.

Each step taken by the candidate appears in the progress bar, and once a candidate has begun an application process, the progress bar displays the remaining sections of the application process in non-hyperlinked mode. Previously completed items remain hyperlinked, except for the Gateway Questionnaire, allowing the candidate to navigate back to the different sections.

The progress bar's style and colors can be customized in Workbench. All Progress bar section labels are customizable for Gateway Questionnaires (and can be hidden on a per-section basis). Some Progress bar labels are customizable for the regular Talent Gateway.

- **External URL link** – Clients have the option to add a link to the Progress bar that directs candidates back to a client-designated page. The link appears in front of the link for the Talent Gateways home page.

- **"Home" item** – Clients have the ability to customize the word "Home," as appearing in the Progress bar.

Clients should also decide the style and color of the progress bar. The default color for the current and previous sections on the progress bar is royal blue, and the default color for the upcoming sections of the progress bar is medium gray. The progress bar has four styles. Styles 1, 2, and 3 allow for the Progress bar's colors to be customized. However, styles 1, 2, and 3 use the Wingdings 2 font, which is installed with Microsoft Office, but not Windows by default. Though many candidates will be looking for jobs from school or work, where Office is probably installed, clients who are sourcing people who are unlikely to have Microsoft Office on their computer should use style 4. Style 4 uses images, but does not offer flexibility for defining colors. Because of the font limitation, style 4 is the default style.

The progress bar is available by default for Full Talent Gateways across all service levels and for all Gateway Questionnaires. The progress bar is unavailable for Basic Talent Gateways.

The progress bar is available on a per-Gateway basis, per *Workbench* configuration. The Gateway Questionnaire inherits the progress bar settings, which means the progress bar is unavailable for a Gateway Questionnaire when the progress bar feature is disabled for the entire Talent Gateway.

Custom "From" e-mail

E-mails sent from a Talent Gateway (for example, Reset password, Change password, and Search agent) display "donotreply@brassring.com" in the "From" line. Clients can now insert some text in front of the e-mail address to identify their organization. This does not apply to job submission confirmation e-mail.

Benefits

Increased customization of Talent Gateways displays helps organizations extend their branding, while providing a more complete candidate experience.

New functionality or replacement

This is new functionality.

Overview of implementation

The customizations can be made by *Workbench* Self Service Tier 1 and Tier 2 users.

Implementation decisions

Clients must decide if they want to: customize their Talent Gateway Progress bar displays, the name of their Talent Gateway landing page, redirect to a non-gateway URL, and add an identifying name in the "From" field of e-mails sent by Talent Gateways.

Workbench – Talent Gateway Text Customizations

Several new text customization options have been added to Talent Gateways to configure pages and candidate workflow to reflect more of an organization's branding. Additional information on the customizations can be found in the Talent Gateways Release Notes. All customizations are performed in *Workbench*.

Please note that there are new, Gateway Questionnaire-specific text customizations that are detailed in the Gateway Questionnaire section of these release notes.

To perform the new text customizations, *Workbench* users navigate to Tools > Talent Gateways > Text customization. Several new fields have been added for Talent Gateways text customization.

Tab	Field	Description
Progress bar	Client page title	The value entered here displays at the beginning of the cookie crumbs, and when clicked, returns the user to the client's specified page. Maximum of 100 characters.
Progress bar	Display on cookie crumb	Checkbox, unchecked by default. When checked, the customized cookie crumb text (defined in the "Client page title" field) will be displayed at the front of each of the Talent Gateway page cookie crumbs. When selected, values must be entered for "Client page title" and "Client page URL" settings.
Progress bar	Client page URL	The URL entered in this field is the client's external (non-Talent Gateway) page that candidates are directed to when clicking the client page cookie crumb. Maximum of 60 characters.
Progress bar	Welcome page title	The value entered in this field is the page name of the Talent Gateways home page, as displayed in cookie crumbs. Default value is "Home." If no text

		is entered in this field, "Home" will display in the Talent Gateway. Maximum of 100 characters.
Landing page	Site general submission link text	When the setting for a general (Resume/CV) apply is enabled, the general apply link text defaults to "Submit resume/CV."
Notifications	E-mail originator (Name)	The value entered in this field is displayed in front of the "From" address in any e-mails sent from Talent Gateways, except for submission confirmation e-mails. Maximum of 100 characters.
Notifications	Display in "From" line	Checkbox, unchecked by default. When checked, the value entered in the "E-mail originator (Name)" field id displayed in front of the e-mail address.

In addition, several text customization settings have been renamed to more accurately reflect their functionality. The changes have been made to the "Create new account" tab, which is now called the "Create login" tab. The field to define "Create an account intro text" has been renamed "Create login intro text."

Talent Gateways – General Enhancements

"All" option for searching jobs in languages

An option for "All" languages is available when searching for jobs in Global Talent Gateways. The "All" option for searching jobs in all languages aids organizations with multilingual locales, in which candidates want to see all available jobs, regardless of the language. This feature became available in July of 2005.

Passing codes to Full Talent Gateways

Clients can now connect job board applications to Full Gateways and retain the codes associated with the positions. Candidates coming from a job board to a Talent Gateway site will land on the selected job Job details page as defined by the source code.

The codes passed to Enterprise for the candidate are the codes passed from the job boards to the Talent Gateway, plus the Job code of the position the candidate applied for. This feature became available in August of 2005.

Translated regions

The region names in a Global Talent Gateway are now translated into the language of the user's interface. For example, if a user is opening a req in Japan from a French Talent Gateway, the dropdown menu to select the region where the job is located now displays all of the regions translated into French.

Conceptual search engine upgrade

With Release 8, BrassRing has upgraded Verity, the search engine that powers Job Match. Please note that the top results from a Job Match search will be more accurate (and a little different) with Release 8. Job Match for Talent Gateways will be upgraded on December 5.

New language setting for Global Talent Gateways

There is a new setting that, when enabled, allows job postings to be listed in all of the client's languages by default. If the setting is not enabled, job postings function as they did before, displaying job postings in the language of the user's locale only.

Talent Gateways – Unique Login Name and Security Questions

Talent Gateway users can now log in with a unique username instead of the e-mail address that was formerly required. If clients want to continue using e-mail addresses only for login, unique usernames do not have to be enabled. The default is to have e-mail addresses only used.

In addition, security questions have been enabled for Talent Gateways that candidates must answer when creating a new account or when removing the value in the "Contact e-mail address" field.

Unique login name

When unique username functionality is enabled, any unique string can be used as a login. If an e-mail address is used as a login, the login e-mail address is separate from (though it can be the same as) the Contact e-mail address. Any communications will be sent to the e-mail entered in the Contact e-mail address field. If the candidate's e-mail address is missing from the resume and therefore not extracted in the Contact e-mail address field, BrassRing populates the Contact e-mail address field with the e-mail address provided in the login information. If an e-mail address is not used as a login, 'Contact e-mail address' field remains blank.

Security questions

When creating a new account, the candidate must answer one of three security questions for when he or she needs to retrieve login information:

- What is the name of your first school? (pre-populated as the default first question)

- Where is your favorite vacation spot?

- What is your mother's maiden name?

One of the three questions must be selected and answered when a new login is created. Answers can have a maximum of 50 characters, and a mix of alphabetical, numeric, and special characters is accepted. To retrieve a forgotten password, the system checks the contact e-mail address associated with the profile, and the user is asked to answer the security question only if the e-mail address is missing. Thus, candidates with no contact e-mail address can reset their password within the Talent Gateway. If a contact e-mail address is found, the system sends a password recovery eLink to the user.

The security question is asked when the user without an e-mail address login clicks the Forgot your password? link. If the correct answer to the security question is given, the candidate resets his or her password. If the wrong answer to the security question is given, the user is allowed two more attempts to answer the question. If the question is answered wrong three times and the organization has the lockout period setting enabled, the user will be locked out of the system for a set period of time.

If a user without a security question activated attempts to remove the address in the Contact e-mail address field, he or she is prompted to create a security question.

Benefits

Allowing a unique username to be used as a login instead of e-mail address provides more flexibility in the candidate experience, while making Talent Gateways more useful for hourly hiring.

Providing a security question when candidates without e-mail addresses forget their passwords adds another level of security to Talent Gateways.

New functionality or replacement

This is new functionality.

Details/Limitations/Workarounds

Usernames cannot exceed 100 characters, spaces are not allowed, and the string and cannot include the "<" or ">" characters.

Overview of implementation

This feature is available across all Talent Gateway service levels.

All Gateway sites need to be synchronized after the login type change is made.

Implementation decisions

Clients should decide if they want candidates to be able to use usernames (any unique username or e-mail address) or an e-mail address only username as logins to Talent Gateways.

Switching login values to unique names is a one-time change that cannot be changed back to e-mail addresses only.

Welcome Screen Message Translation

Enterprise Welcome screen messages to users are now translatable into each client purchased language from one central place.

Previously, Welcome screen messages were translatable, but the user had to be logged in for the language to be translated. Now an administrator or super user can post global messages from one screen, regardless of the user's language. When adding or editing a custom Welcome Screen message, there are additional textboxes for each purchased User Interface language. The textboxes allow for translated messages, as well as language-specific messages to be added.

Benefits

Having Welcome screen message translations available from one central place makes communicating with a global user community more efficient.

New functionality or replacement

This is new functionality.

Details/Limitations/Workarounds

If the additional language textboxes remain blank, without any text entered, no Welcome Screen message will appear for that User Interface language.

Overview of implementation

This change is available to all users who have access to the Admin + "Customize system welcome" privilege, and impacts only users that have the privilege associated with their user type, in most cases, the Super user or equivalent.

Implementation decisions

Clients should decide which languages need separate Welcome screen messages.

Workbench – Self Service Access Levels

Overview of functionality

With Release 8, there are now multiple access levels available for *Workbench* Self Service users. Increasing levels of certification are needed for each level of access. With each new release, *Workbench* users can be trained and certified to access the new functionality.

All *Workbench* users, by default, have certification Tier 1, which they were trained for with Release 7.5. *Workbench* users can attain certification Tier 2 after being trained on Release 8 functionality. Future releases of *Workbench* will add additional certification levels.

Benefits

New access levels for *Workbench* help to retain the value of the certification process while ensuring that clients are appropriately trained on new capabilities before they can configure them for themselves.

New functionality or replacement

This is new functionality.

Details/Limitations/Workarounds

Minor Release 8 *Workbench* functionality changes will be available to certification Tier 1 users, such as administering the Hide all candidate user type privilege. However, major functionality changes require additional training and certification.

Overview of implementation

Users must be trained and certified to acquire Tier 2 access.

Implementation decisions

Clients should decide which of their *Workbench* administrators should have Tier 2 access.

Timeframe of Implementation

Clients can begin training users for Tier 2 with Release 8.

Cost

There is no additional cost for this feature.