

KenexaRecruiter® BrassRing and Talent Gateway Solutions

Product Update Guide

Release 9.0

FINAL

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Enterprise 9 has been renamed to Kenexa Recruiter BrassRing™ 9. Your version of Kenexa Recruiter BrassRing 9 reflects these changes.

Workbench has been renamed to Kenexa Recruiter BrassRing™ 9 – Workbench. Your version of Workbench reflects these changes.

Release overview

The following table summarizes BrassRing’s Release 9 product features for *Enterprise*.

User interface enhancements

Feature	Description
User interface	<i>Enterprise</i> , the Reports Module, and the Data Export Wizard (DEW) have a new user interface and color scheme.
Configurable UI color scheme	The color scheme for <i>Enterprise</i> , the Reports Module, and DEW is configurable at the client level through <i>Workbench</i> .
Talent Record	The Talent Record has new tabs for each section replacing the “jump-to” links. The Talent Record has a new Actions menu.
<i>Enterprise</i> -wide	The Actions menus are accessible from all tasks and pages.
	All <i>Enterprise</i> functions that return data to the user have a redesigned output format.

Req creation usability enhancements

Feature	Description
Save as draft	<i>Enterprise</i> users can save a requisition as a draft and continue working on it later.
Spell check & format text	<i>Enterprise</i> users can spell check and format text on the requisition.
“My req” default settings	<i>Enterprise</i> users can create user-specific default settings on a requisition and save it as a “My req” template for that user’s requisitions.
Multi-language reqs	<i>Enterprise</i> users can toggle freely between languages on a requisition without having to clear the base language when creating multi-language requisitions.
Autofiler notifications	<i>Enterprise</i> users can turn off autofiler notification for specific requisitions (if your organization uses Autofiler).
Actions to On Hold reqs	<i>Enterprise</i> users can close, cancel, and delete a requisition from On Hold depending on the requisition’s prior status.
Req field access by user type	Clients require standard and custom fields on requisitions by user type.
Field associations	This feature allows the selection of an option in one field to restrict or automatically select the options available in subsequent fields on requisitions, thereby constraining and automating the process of creating requisitions.
Job posting preview	Recruiters can preview a job requisition posting prior to actually posting it on a Talent Gateway. Recruiters can also send an eLink of

	one or multiple job posting previews on different Talent Gateways, if applicable.
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Recruiter usability enhancements

Feature	Description
Limit access to candidates by HR status	Access to candidates in selected HR statuses in req folders is limited by user-type privileges.
External Req URL browser display	<i>Enterprise</i> tries to match the locale for external users who click External Req URLs or eLinks for reqs or approvals.
Insta-file	Clients who use autofile can enable Insta-filing for Talent Gateways and Agency Manager so that candidates are filed to reqs immediately and not overnight.
Edit Req icon	This icon now only displays for users who have the user type privilege to edit reqs.
<i>Enterprise</i> resume/CV and TG profile update synchronization	A new <i>Workbench</i> setting ensures that <i>Enterprise</i> resumes/CVs are updated for candidates each time a candidate changes his/her Talent Gateway profile.
Most recent education and experience	Candidates using Talent Gateways and recruiters working in <i>Enterprise</i> must indicate most recent education and most recent work experience when adding a profile/CV.
Add notes to Add candidate / Add contact and launch Talent Gateway	<i>Enterprise</i> users can add notes when using the Add candidate and Add contact options in the Candidates menu and then immediately launch the Talent Gateway.
Communications icon as output column	<i>Enterprise</i> users can select Communications as a column on several output grids.
Configurable locale names	Clients can substitute familiar names for languages and locales for display in <i>Enterprise</i> .
Print header for Talent Record	Clients can create a customized printing page header for the Talent Record.
Print Preview Talent Record	<i>Enterprise</i> users can preview the print selection before printing the Talent Record.
Printing the Talent Record	Each Talent Record tab has its own Print button
eLink Respond text	Clients can change the accompanying text next to the eLink Respond button.

Search enhancements

Feature	Description
Proximity searches for candidates	Recruiters can search for candidates within a certain radius, expressed in miles, of a zip code.
Search on inactive & active codes	<i>Enterprise</i> users can search on inactive and active codes. Inactive codes are identified as such.
Improvements to candidate filtering	The 1000-candidate limit on filtering has been removed. When filtering candidates, only those candidates in a folder are filtered.
Expansion of search filters	<i>Enterprise</i> users have seven new filter fields to use in searching for candidates: HR Status, HR Status: Excluded, Folders, Folders: Excluded, Forms, Forms: Excluded, and E-mail address.

Saved and overnight searches	<i>Enterprise</i> users can include the seven new filter fields as part of a Saved search or an Overnight search.
Auto unsubscribe from overnight searches	<i>Enterprise</i> users are automatically unsubscribed from an overnight search for candidates when the req for which the search is being performed is closed or the working folder is inactivated.

Communications enhancements

Feature	Description
New text editor	<i>Enterprise</i> has a new text editor for creating e-mail templates, candidate e-mails, and blurbs.
HTML and plain text tabs	<i>Enterprise</i> users can switch easily between the HTML and Plain text tabs.
Formatting toolbars	The text editor provides the full arsenal of toolbars for word processing.
E-mail creation tools	The Communications Module provides improved e-mail creation tools, including the new text editor, an expanded list of merge tokens, the ability to insert blurbs, upload documents, embed links, and so forth.
New Add e-mail template	The Communications module has a new, improved Add e-mail template.
Optional label for return e-mail address	On the Add/Edit e-mail template page, the Return e-mail address field is labeled explicitly as optional so that users realize they can fill it in <i>or</i> leave it blank.
“Last edited” audit	Users can track when an e-mail template was last edited and by whom.
Blurb library	<i>Enterprise</i> users can use the new text editor to create a repository of blurbs for use in e-mails and e-mail templates.
Blurbs and org groups	Blurbs (boilerplate HTML code for insertion into e-mails and e-mail templates) can be associated with org groups.
Send e-mail communication page	<i>Enterprise</i> has a new Send communication page for easily creating complex e-mails from templates or from “scratch.”
Form links	Users with the appropriate user type privileges can view candidate forms and candidate overview data.
Option for eLink format	Clients can set a different default setting for the standard eLink format for their organization, “Optional – attachment default.”
Communications history	The single-candidate Send communication page displays the communications history for that candidate.
User tokens for letter templates	Users can create letter templates containing merge tokens representing the user first name, last name, e-mail address, job title, department, phone number, and fax number.
Gender salutations for letter templates	Clients can use BRML (BrassRing Markup Language) for gender salutations in letter templates.

Standard report enhancements

The following table summarizes changes to each report listed on the Standard reports menu.

Report name	Report enhancements
System user report	Changes to filters:

	<ul style="list-style-type: none"> • Security checks are performed on Organizational group and User name report filters. <p>Changes to output:</p> <ul style="list-style-type: none"> • The Days active column has been removed. • Three new fields have been added: Candidate eLinks sent, Form eLinks sent and Communications sent.
HR action activity	<p>Changes to filters:</p> <ul style="list-style-type: none"> • Security checks are performed on requisition field-based report filters. • Existing standard requisition field-based filters, Location/Division, Department, Manager, and Recruiter , can be exchanged for custom requisition field-based filters (configured by BrassRing). • Expanded date range filter options • New filter “HR status” allows selection of specific statuses. • The Req ID filter has been enhanced to allow multiple selections. • The Report logic modified to bring back data relevant only to filter selections. • The “Schedule report” option has been added. <p>Changes to output:</p> <ul style="list-style-type: none"> • Existing standard requisition field-based output fields, Location/Division, Department, Manager and Recruiter, can be exchanged for custom requisition field-based output fields and sort/group options. • Appropriate security checks on requisition field-based output fields and sorting/grouping options performed • Report format is reorganized to separate requisition data from candidate data creating an easier-to-read output.
New hire	<p>Changes to filters:</p> <ul style="list-style-type: none"> • Security checks are performed on requisition field-based report filter. • Existing standard requisition field-based filters, Location/Division, Department, Manager, and Recruiter, can be exchanged for custom requisition field-based filters (configured by BrassRing). <p>Changes to output:</p>

	<ul style="list-style-type: none"> • Existing standard requisition field-based output fields, Location/Division, Department, Manager and Recruiter, can be exchanged for custom requisition field-based output fields and sort/group options. • Appropriate security checks on requisition field-based output fields and sorting/grouping options performed
Open req activity	<p>Changes to filters:</p> <ul style="list-style-type: none"> • Security checks are performed on requisition field-based report filter. • Existing standard requisition field-based filters, Location/Division, Department, Manager, and Recruiter can be exchanged for custom requisition field-based filters (configured by BrassRing). <p>Changes to output:</p> <ul style="list-style-type: none"> • Existing standard requisition field-based output fields, Location/Division, Department, Manager and Recruiter, can be exchanged for custom requisition field-based output fields and sort/group options. • Appropriate security checks on requisition field-based output fields and sorting/grouping options performed. • Optional ReqID and ReqID columns have been consolidated into a single ReqID field which will pull in either the BrassRing auto-generated requisition number or the client-generated requisition number based on your <i>Enterprise</i> system configuration.
Req status summary	<p>Changes to filters:</p> <ul style="list-style-type: none"> • Security checks are performed on requisition field-based report filters. • Existing standard requisition field-based filters, Location/Division, Department, Manager, and Recruiter, can be exchanged for custom requisition field-based filters (configured by BrassRing). • The “Status” filter is replaced with new filter “Moved to req status” which allows selection of multiple req statuses • The "Schedule report" option has been added • The Report logic was modified to bring back data relevant only to filter selections. <p>Changes to output:</p>

	<ul style="list-style-type: none"> Existing standard requisition field-based output fields, Location/Division, Department, Manager, and Recruiter, can be exchanged for custom requisition field-based output fields and sort/group options. Appropriate security checks on requisition field-based output fields and sorting/grouping options performed. Output data will be grouped by req status.
Diversity hires report	<p>Changes to filters:</p> <ul style="list-style-type: none"> Security checks are performed on requisition field-based report filter. Existing standard requisition field-based filters, Location/Division, Department, Manager, and Recruiter, can be exchanged for custom requisition field-based filters (configured by BrassRing). <p>Changes to output:</p> <ul style="list-style-type: none"> Existing standard requisition field-based output fields, Location/Division, Department, Manager and Recruiter, can be exchanged for custom requisition field-based output fields and sort/group options. Ability to designate the ‘instance’ of an applicant’s candidate type to be used in the report calculations (configured via <i>Workbench</i>) Appropriate security checks on requisition field-based output fields and sorting/grouping options performed. Results are now grouped by candidate type.
Diversity hires panel	<ul style="list-style-type: none"> Up to five (5) candidate types, either standard or custom, may now be selected for display on the Diversity hires panel (configured by BrassRing). Ability to designate the ‘instance’ of an applicant’s candidate type to be used in the report calculations (configured by BrassRing).
Time to fill	<p>Changes to filters:</p> <ul style="list-style-type: none"> Security checks are performed on requisition field-based report filter. Existing standard requisition field-based filters, Location/Division, Department, Manager, and Recruiter , can be exchanged for custom requisition field-based filters (configured by BrassRing). <p>Changes to output:</p> <ul style="list-style-type: none"> Existing standard requisition field-based output fields, Location/Division, Department, Manager and Recruiter, can be exchanged for custom requisition field-based output fields and sort/group options.

	<ul style="list-style-type: none"> • Appropriate security checks on requisition field-based output fields and sorting/grouping options performed
OFCCP search activity report	This report lists the searches performed within a specified date range by <i>Enterprise</i> users, and the Requisitions <i>or</i> Search reasons associated with those searches.
Reports downtime shortened	The downtime for reporting databases proceeds on a rolling basis between 12:00 AM and 3:00 AM ET so that the overall downtime for running reports is significantly shorter. A specific reporting database may be down but others are available.
Candidate activity	The e-mail address is visible in the e-mail address field for all candidates.
Talent Comparison Summary	<i>Enterprise</i> users can eLink report results.

Data Export Wizard (DEW) enhancements

Feature	Description
“Other phone” field	New standard candidate field has been added to the output field selection.
Changes to date filters on Req filter	"Days back" option has been added to the standard req date field filters.
Standard “System profiles”	This section describes the five standard system profiles and how to use them when creating DEW profiles for your organization.
System profile reference	This section provides reference information for each new system profile: Candidates loaded System profile (page 104), Hired candidates System profile (page 105), Reqs created System profile (page 106), Open reqs System profile (page 107), and the Reqs closed System profile (page 106).

Security enhancements

Feature	Description
<i>Enterprise</i> IP range restrictions	Clients can configure a range of IP addresses for accessing <i>Enterprise</i> in addition to discrete IP addresses, making it much easier to administer.
Single-sign-on encryption	Single-sign-on encryption enhances security and simplifies the access of authenticated users to multiple logins within your <i>Enterprise</i> deployment.
eLink authentication	eLink authentication validates and authenticates users who attempt to open eLinks so that they can be opened only by the intended recipients, protecting you against unauthorized access to sensitive data.

Partner enhancements

Feature	Description
RecruitUSA name change	RecruitUSA has changed its name to Arbita.

Other enhancements

Feature	Description
Seven-day posting rule for	Your organization can choose to block the ability of <i>Enterprise</i> users to update the HR status of candidates filed to reqs that are posted to a Talent Gateway for a period of seven days after posting.

HR status updates	
Automated Candidate Purge	ACP is a new utility available to clients through the Admin module in <i>Enterprise</i> . Using ACP, clients can build rules-based criteria sets and schedules for automatic purges of candidates from <i>Enterprise</i> and Talent Gateways.

Automated Candidate Purge

Automated Candidate Purge (ACP) is a new utility available to clients through the Admin module in *Enterprise*. Using ACP, clients can build rules-based criteria sets and schedules for automatic purges of candidates from *Enterprise* and Talent Gateways. “Purging candidates” means purging all data associated with the candidates selected for purging. This feature is described in detail in the *BrassRing Automated Candidate Purge Guide*.

To use Automated Candidate Purge, clients must select a designated user to complete BrassRing certification training and the functionality must be configured by BrassRing by a BrassRing representative.

After training, certification, and implementation, the certified ACP administrator develops, defines, and tests one or more criteria sets for selection and deletion of candidates from their organization’s database. Users are able to create preview reports for internal review before scheduling actual purges. They can purge on a one-time basis or set up recurring schedules for purging. Finally, users can create reports documenting purge results.

Automated Candidate Purge can erase up to ten thousand (10,000) candidates at once. The purge operation completely erases candidate data for the selected candidates from *Enterprise*. Clients have the option of deleting candidates’ profiles from Talent Gateways as well.

For more information about implementation and training for Automated Candidate Purge, please contact your BrassRing representative.

Best practice recommendations

Because of the legal implications of deleting candidate data, clients are urged to consult their internal legal and compliance resources for guidelines as to the best criteria which to employ to purge candidate data.

Benefits

Automated Candidate Purge helps clients to meet compliance regulations.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature is available to all BrassRing clients. Clients must designate a user/administrator for certification training. After training and certification is complete, the feature is enabled in *Enterprise*.

Implementation decisions

Clients must select an appropriate candidate to be ACP administrator and follow the procedure for developing and testing purge criteria.

Time frame of implementation

This feature is available in Release 9 for new clients, but will be provided to existing clients in a controlled fashion within the first few months after the release. This is being done to ensure that the execution of the queries involved in the purge does not create an adverse impact on the production *Enterprise* environment for end users, when applied to a large, initial set of data.

The steps for implementing Automated Candidate Purge are as follows:

1. A BrassRing representative works with the client on purge criteria and setup for the execution of the initial purge of legacy data.

After the initial purge, the designated client administrator attends training for the purge utility.

The schedule is set up to run the purge regularly in the future.

Cost

There is a cost for setup and certification training for this feature.

Improved “Add candidate/contact” workflow

As of this release, recruiters using Add candidate or Add contact menu items in Enterprise can add a note to the candidate’s profile and/or immediately access the Talent Record for that candidate. The recruiter is already logged into Enterprise when s/he selects the Add candidate or Add contact menu item.

These features are available only for “Add candidate” and “Add contact” Basic Talent Gateways. These features require configuration by BrassRing. When turned on at the client level, these features are available to Enterprise users. In addition, user type privileges determine if a user may add notes and/or access Talent Records. Please contact your BrassRing representative for information about these features.

Benefits

The improved workflow increases recruiter efficiency and productivity.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature must be turned on by BrassRing. Please contact your BrassRing representative for more information.

Cost

There is no cost for this feature.

“Add note” details

The **Add note** section is at the end of the application sequence before the confirmation. The Add note dialog box includes the date, author, and text of the note. Users may use some HTML tags (such as tags for bold and italic) in the Notes text box.

Enterprise users must have either the “add notes - public” or “add notes – private” user-type privilege in order to access the **Add note** section at the end of the application process.

Candidates with notes added to their profiles have a clickable yellow post-it note icon in the **Notes** column on the Candidate grid. Candidates without notes have a green plus sign in the **Notes** column.

The “Add note” feature is not available to candidates accessing a Basic Talent Gateway externally.

“Continue to Talent Record” details

Enterprise users working in Basic Talent Gateways from within *Enterprise* can go directly to the candidate's Talent Record after adding a note to the candidate's profile/CV.

The **Continue to Talent Record** button is on the Add note confirmation page.

Users must have the appropriate user-type privilege to search candidates and access Talent Records to use this feature.

New Add candidate/contact workflow

When the "Add note" and "open Talent Record" features are enabled, the new workflow is as follows:

1. In *Enterprise*, click **Candidates > Add candidate** or **Add contact**.
2. Complete the profile/CV creation process.
3. At the end of the profile/CV creation process, click **Add note**.
4. Enter the date, your name, and the note text. You can format your notes using the HTML tags for **bold** (bold) and *italic* (<i>italic</i>) if desired. Notes can have a length of 4000 characters.
5. Click **Submit** to save the note.
6. Click **Continue to Talent Record** to open the candidate's Talent Record, or click **Close** to end the session.

Note

If the candidate is not yet loaded to *Enterprise* or the *Enterprise* window is closed, the Talent Record does not open and displays the following error message:

"The Talent Record is not currently available. If your *Enterprise* window is closed, you will not be able to access the Talent Record. Otherwise, please try again later."

Benefits

The improved workflow increases recruiter efficiency and productivity.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature must be turned on by BrassRing. Please contact your BrassRing representative for more information.

Cost

There is no cost for this feature.

“Code display” questions can be scaled-select

When adding a candidate in Basic Talent Gateways, clients can opt to use a scale-select list in place of a multi-select list box for “code display” type questions with more than 200 codes.

Benefits

This option makes it easier to scroll through lists of values when the list is very long.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature is implemented by BrassRing. Please contact your BrassRing representative for more information.

Cost

There is no cost for this feature.

Communications enhancements

BrassRing introduces robust Candidate communications functionality for both standard and administrative users in this release of *Enterprise*.

All users enjoy an improved workflow for e-mail creation which includes correction tools for merge errors and the ability to send volume e-mails.

Template administrators have new tools for e-mail template administration:

- a new text editor used for creating e-mail templates, e-mail messages, and blurbs
- a redesigned Add e-mail template page for e-mail template creation and administration
- expanded merge token functionality
- the ability to include links to jobs posted on Talent Gateways, forms to complete, and attachments to e-mails and e-mail templates
- a new “blurbs” feature including the ability to create and manage blurbs.

See the next several sections for more information about these enhancements.

The new text editor

Enterprise 9 includes a new text editor with HTML and plain text tabs, an expandable message body area, standard toolbar buttons for formatting, a spell check tool, and other word processing tools depending on the user’s role and associated tasks.

The text editor is available on the Add e-mail template, Add blurb, and Send communication page (or Send candidate communication page for clients with Agency Manager installed). The text editor displays message contents in rich text in the HTML tab, showing formatted and decorated text, clickable hypertext links, images, and other effects. Users can click **Expanded view** to enlarge the text editor’s working area. See the following sections for more details on these items.

HTML and plain text tabs

The text editor has two tabs above the MESSAGE BODY area. The HTML tab is the default work area for creating an e-mail template, e-mail, or blurb. Users can create the message on the HTML tab and switch easily to the Plain text tab to see how it looks in plain text.

The Plain text tab displays the contents of the e-mail template, e-mail message, or blurb text stripped of html tags with a line break at each place where the user pressed **Enter** (usually at each new paragraph) while working in the HTML tab of the text editor.

Formatting toolbars

The text editor toolbar provides the ability to:

- select font face and size. The text editor's default font is Arial x-small
- apply text styles (bold, italic, underline), colors, and fill
- cut, copy, and paste text
- move text blocks (indent and outdent)
- justify text blocks (left, center, and right)
- create numbered lists and bulleted lists
- browse, preview, insert, and align images
- insert hypertext links

Benefits

Users can easily create e-mails, e-mail templates, and blurbs using a familiar arsenal of text formatting tools.

New functionality or replacement

This is new functionality.

Details / limitations / workarounds

In past releases, *Enterprise* users could manually insert custom text placeholder phrases enclosed in angle brackets in their letters (for example, <insert job title here>). Release 9's new merge functionality includes many new merge tokens that can be used in place of custom placeholder text. However, users may still want to insert custom placeholder text of some type in their letters before sending them.

The new text editor reads angle brackets (< and >) as html, causing angle-bracket placeholders to disappear. Therefore, we recommend that users enclose custom placeholder text in square brackets (for example, [insert job title here]) instead for any placeholders that they insert manually into their letters.

Overview of implementation

The text editor and formatting tools are available to all clients in Release 9.

E-mail creation tools

Enterprise 9 provides tools for an improved workflow for e-mail creation within the redesigned and enhanced Send communication page, used for editing and building complex e-mail communications, and sending them to up to 200 candidates simultaneously. The Send communication page includes:

- A text editor for rich text formatting. See page 65 for more information.
- A spell checker.

- An expanded list of merge tokens available for use in e-mails.
- Improved workflow for merge tokens, including error reporting on missing merge values.
- The ability to:
 - embed links to jobs on Talent Gateways
 - embed links to forms within the message body
 - add attachments before sending e-mails
 - send volume e-mails

Browser and e-mail format compatibility

Candidates and other *Enterprise9* e-mail recipients use a variety of Internet browsers, some with limited capabilities. As a best practice, *Enterprise9* sends e-mails in the multi-part MIME format (including HTML and plain text) to ensure compatibility with different browser types and versions. The plain text version is automatically generated for those recipients whose e-mail browsers don't accept the HTML version.

New “Add e-mail template”

The redesigned and enhanced Add e-mail template page for template creation and management includes the new text editor, described on page 65, for composing and formatting the message body. In addition, the new template includes:

- A significantly expanded list of merge tokens.
- The ability to embed form links wherever you want on the page.
- The ability to browse and upload attachments.
- The ability to create and save frequently used blocks of text—blurbs—in a library. Some examples of blurbs are “about our company” information, equal opportunity statements, directions to the office, or a link to a privacy policy.
- The ability to insert blurbs into any message while composing it.

See the following sections for more information.

Expanded merge functionality

Enterprise 9 includes a many new merge tokens for creating e-mail templates. Users can insert merge tokens from the following sources:

- Candidate information (or Resume/CV)

- Candidate forms
- Req standard fields
- Req custom fields
- User profile (Please note that selected “User profile” fields were already available in *Enterprise 8.0.*)

Merge tokens are placeholders for text blocks communicating various types of customized information. The user can position merge tokens within the body of the e-mail message. The tokens are merged into one seamless e-mail message at the time of sending the message.

Embed links to forms

Users can embed links to forms anywhere in the body of the e-mail message.

Add links to Talent Gateway jobs

Users can insert links to one or more jobs posted on Talent Gateways anywhere within the body of the message.

Upload attachments

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

Insert blurbs in e-mails and e-mail templates

Enterprise users who administer e-mail templates can use the new text editor to create richly formatted blurbs for insertion into those templates. See page 65 for more information about the new text editor included in this feature. Some examples of “blurbs” are frequently-used text such as a privacy policy, company overview, Equal Opportunity Employer statement, and so forth.

“Return e-mail address” field has an “optional” label

In the Template name area at the top of the Add/Edit e-mail template page, the **Return e-mail address** field is labeled explicitly as optional so that users realize they can either fill it in or leave it blank. If left blank, the return e-mail address populates the sender’s e-mail address field as usual.

“Last edited” audit for e-mail templates

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

Benefits

Users can create complex e-mails or e-mail templates and include a variety of data types within the message body.

New functionality or replacement

This is new and replacement functionality.

Overview of implementation

These features are available to all clients in *Enterprise9*.

Create a “blurb” library

Users who administer e-mail templates and have the new “administer blurbs” user privilege enabled can use the new text editor to create a library of richly formatted blurbs for insertion into those templates. Saved blurbs are added to a repository of blurbs for use in e-mail templates and listed on the Communications: Blurbs page.

Some examples of “blurbs” are frequently-used text such as a privacy policy, company overview, Equal Opportunity employer statement, and so forth. See page 65 for a detailed description of the text editor included in this feature.

Associate blurbs with org groups

Users creating e-mail templates can select blurbs for use by designated org groups.

On the Add new group page the administrative user can use the Affiliated blurbs dialog box to associate blurbs with specific org groups when creating a new org group or modifying an existing org group.

To use this feature, select **Admin > Admin+ > Org. groups** to display the Admin+: Org groups page and clicks the **Add new group** button in the top left corner of the page.

Benefits

Users can create and save messages that they use repeatedly and insert them into e-mail communications.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature must be enabled in *Workbench*.

Implementation decisions

Decide if your organization would like to use a Blurb library and if so, which user types should have this privilege.

New “Send e-mail communication” page

Enterprise 9 provides a new Send communication page for easily creating e-mails based on e-mail templates. E-mail templates contain embedded greetings, information, merge tokens, Gateway job links, forms, and attachments for typical types of correspondence with candidates.

The Send communication page is divided into two main sections: the e-mail message area and the Candidate and merge information area.

The e-mail message area contains the sender/recipient section, the new text editor for composing messages, the Links to gateway jobs section, and the Upload attachments section. Users can edit and format e-mails created from e-mail templates, embed links to updated job listings, and attach documents of all types.

Merge tokens and other predetermined information from the selected e-mail template are included in the MESSAGE BODY of the text editor. Users can add additional text or other data, and arrange merge tokens as desired.

Data validation and error detection

Enterprise 9's Communications Module facilitates the efficient and accurate creation of complex e-mail messages for one or multiple candidates by validating data and reporting errors as it assembles the e-mail message.

The module checks for missing merge values, missing or incomplete e-mail addresses, and other problems in the e-mail message. It displays an informative message and places a red flag next to records that need attention.

The user can expand each record row to take further action on the records with problems. The user can send e-mails successfully after error correction is complete.

Use form links to view and edit candidate forms

Users with the appropriate privileges can view candidate forms and candidate overview data. The user clicks the **View** link to display the candidate form or candidate overview data in another window.

Users with the appropriate privileges can edit a candidate form. Click the **Edit** link to display the candidate form in edit mode in another window.

Option for eLink format

Clients may elect to use a new optional default setting for sending links as attachments in the candidate eLink workflow. This setting changes the default eLink sending option for the client to “**as attachment**,” but the sender can always choose a different eLink format manually when creating the e-mail. This setting is recommended if your organization sends most of its eLinks as attachments.

For system-generated e-mails that currently reference this client setting, the behavior for **Optional – attachment default** is to send system-generated e-mails containing links as attachments.

Benefits

This setting is recommended if your organization sends most of its eLinks as attachments.

New functionality or replacement

This is new functionality.

Overview of implementation

The setting is turned on by BrassRing. Please contact your BrassRing representative for more information.

Send communications page displays communications history

On the Send communication page for a single candidate you can select an e-mail or letter template to use for your candidate communication. You can also see the Communications history grid for that candidate. The grid displays each communication sent in its own row and includes the following columns: **Date sent**, **Folder type**, **Req ID**, **Folder**, **Communication**, **Type**, **Sent by**, and **Status**. The Send communications page for multiple candidates does not contain a communications history grid.

Benefits

These enhancements give customers more control over the image conveyed through candidate communications and streamline the process of sending e-mail to hundreds of candidates.

New functionality or replacement

This is new functionality.

Overview of implementation

Candidate marketing features included in *Enterprise9* are available to all users.

Enterprise user detail tokens for letter templates

The *Enterprise* user can insert user detail tokens representing his/her first name, last name, e-mail, department, job title, fax number, and phone number into letter templates. When a letter based on such a template is generated and sent to the candidate, the corresponding user details are displayed in the letter.

The Merge Select box contains the following new tokens: **User first name**, User last name, **User e-mail**, **User job title**, **User dept**, **User phone**, and **User fax**. The fields referring to the candidate's first and last names have been renamed to **Candidate first name** and **Candidate last name**.

Gender salutations in letter templates

Clients may elect to enable tokens for recognizing and appropriately merging gender salutations based on form field responses in letter communications.

Users can generate letters immediately or save them for batch processing. The Admin module processes letter templates that are saved for batch processing.

This change affects the creation of letter templates and batch letters in the Admin modules and the Send communication feature in the Candidate Module.

Best practice recommendations

Your BrassRing representative can help you format your letters.

Benefits

Clients can use gender tokens for replying automatically to information inserted by forms.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature is available to all BrassRing clients. This feature must be implemented by BrassRing.

Cost

There is a service fee for implementation of this feature.

Communications icon available as output column

In Release 9, *Enterprise* users with the appropriate user privileges can include “Communications” as an output column on Candidate output grids and easily access candidate communications from the output page.

There are several functions in *Enterprise* that display results in an output grid: Search, Filter Folder, My Candidates, Working Folder, My Inbox, and Req Folder, for example. Users can edit output fields on the Edit output fields page for one, some, or all of these functions, depending on their user-type privileges.

The **Available values list** box on the Edit output fields page includes “Communications” as a choice for output columns. The Communications option displays only for *Enterprise* users with communications privileges.

When “Communications” is selected as an output column, the column displays the standard Send candidate communication icon. Clicking the communications icon opens the Send candidate communication page.

Benefits

This feature makes it much easier for recruiters to view the entire history of candidate communication summarized in one place.

New functionality or replacement

This is new functionality.

Details/limitations/workarounds

The communications icon always displays even when there is no communication history for the candidate.

Overview of implementation

This feature is available to all clients.

Cost

There is no cost for this feature.

Data Export Wizard (DEW) enhancements

This section briefly describes enhancements and changes in this release to the Data Export Wizard (DEW).

- The Candidate data category has a new output field, “Other phone.” See page 101 for more information.
- BrassRing has added “Days back” functionality to several standard date filters on the Req filter page to facilitate the creation of more flexible DEW profiles. See page 101 for more information.
- The DEW now provides five ‘built-in’ System profiles: Candidates loaded, Hired candidates, Reqs created, Open reqs, and Reqs closed. See page 101 for more information.
- To support the new System profiles, the DEW Profile manager page has separate tabs for “My profiles” and “System profiles.” From the System profiles tab you can run a standard system profile, view its criteria, or take the Save as new action. From the My profiles tab, you can run a custom DEW profile, view its criteria, edit it, or delete it. See page 101 for more information.

See chapter 16 in the *Enterprise* User Guide for more information about the Data Export Wizard.

Candidate fields include "Other phone" field

With the proliferation of cell phones, the ability to track a number other than the home phone number is increasingly common among candidates. “Other phone” is now a reportable standard candidate field in the Candidate category in the DEW.

Changes to date filters in DEW profiles

When setting up date filters in DEW profiles, you can specify an explicit date range (a Begin and an End date) or you can specify a rolling date range (for example, “Last 30 days”). The rolling date range functionality is currently available only on the Resume/CV, HR Status and Forms filter types. For *Enterprise9*, rolling date range functionality is being extended to the standard date fields in the Req type DEW filter, Date created, Date open, Date closed, and Date approved.

When you associate a “Last days” range with a date filter in a DEW profile, the profile automatically adjusts that date range based on the current system date and the number of “days back” selected. For example, a user can create a profile and set the Date open filter to pull all data for requisitions moved to the Open status in the past 30 days.

Standard “System profiles” for DEW users

The DEW provides users with a powerful tool to create *ad hoc* reports against *Enterprise* data. Because of the wide range of data available in the DEW, users typically require some

training in order to take advantage of the available DEW functionality. To give DEW users a head start in creating advanced DEW profiles, this release provides a set of ‘standard’ default *System profiles* for all users with DEW privileges. The new “System profiles” were created based on research of the most frequently executed DEW queries across all BrassRing clients. See the next several sections for more information.

Using the DEW Profile manager

You must have DEW privileges to use DEW profiles. When using the Data Export Wizard, your access to specific *Enterprisedata* is determined by your user privileges.

Select Reports > Data export wizard > Profile Manager in the top navigation bar to open the DEW Profile manager.

The DEW Profile manager page now has two tabs, My profiles and System profiles. The My profiles tab lists all profiles created by or sent to you by another system user. The System profiles tab lists the set of standard DEW profiles available to all users with DEW privileges.

DEW Profile manager tabs

Tab	Description
My profiles	Access your customized profiles or profiles sent to you on this tab. From this tab, you can run a custom DEW profile, view its criteria, edit it, or delete it
System profiles	Select a System profile and view that profile’s criteria or run the Data Export Wizard)

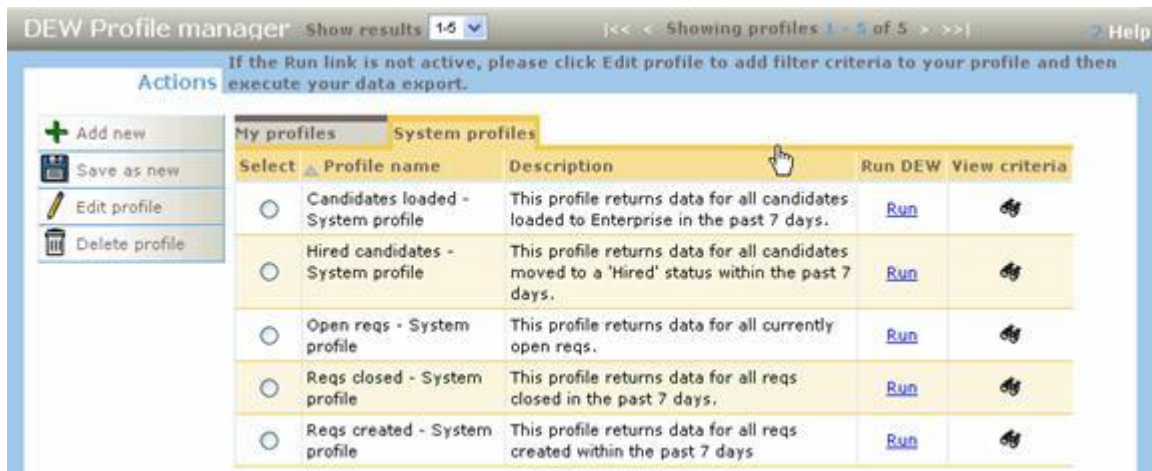
DEW System profiles grid

Click the System profiles tab to see the system profiles grid. You can select a System profile and take any of the following actions:

- Run the profile as is.
- View criteria for the profile.
- Using the System profile as a base, save the profile as a new “My profile” and customize it to better reflect your reporting needs. See page 104 for more information.

The Edit, Delete, or Add new actions cannot be taken against System profiles. System profiles may only be added by BrassRing. See page 104 for detailed instructions for creating editable copies of System profiles.

System profiles grid





The table below describes DEW System profiles.

DEW System profiles

System profile	Description
Candidates loaded	Returns data for all candidates loaded to <i>Enterprise</i> in the past seven days.
Hired candidates	Returns basic details for candidates moved to the client-designated "Hired" statuses within the past seven days.
Open reqs	Returns requisition details for all requisitions currently in an open status.
Reqs closed	Returns details for all requisitions moved to the closed status within the previous seven days.
Reqs created	Returns basic details for all requisitions created in the previous seven days.

The table below describes actions you can take from the System profiles grid.

Actions on Systems profiles

Action	Description
Run Run	To run the default System profile click Run . The Run data export wizard profile page opens. You can run an export in real-time, or run it in the background and have a link to the report results e-mailed to you.
View criteria 	To view criteria for a System profile, click the View icon  for that profile. DEW displays a list of profile criteria as shown in the image below. See the example below.

Creating a “My profile” from a System profile

Using the “Save as new” functionality against a DEW System profile, you can create a new “My profile” that will be saved to your My profile tab on the DEW Profile manager page. The general steps for creating a customized DEW profile are:

1. Select Reports > Data export wizard > Profile Manager. Click the System profiles tab.
2. Select the System profile you want to use as the base for your new profile.

3. Click Save as New in the Actions menu. The Save as new Data Export Wizard profile page displays. This is an editable copy of the selected system profile.
4. Select or remove output fields, as appropriate, and click Next to edit the filters for your new DEW profile.
5. On the Save as new Data Export Wizard filter type page, accept the selected filter type and click Next.
6. On the filter criteria page, modify the selected filter criteria for this profile, as appropriate, and click Save.
7. DEW opens the Profile creation confirmation and Run Data Export Wizard profile page. From this page you can run the DEW immediately or in background mode or close the window.

DEW System profile reference

This section describes the output fields, filter type, and filter criteria for each System profile.

General rules affecting System profiles

The rules described in this section apply to all DEW System profiles.

DEW profile execution – Existing DEW security restrictions are enforced when a DEW System profile is executed.

"Hidden" fields – The majority of the fields contained in this profile are standard to all users and cannot be hidden. There are a few standard fields, however, like Department and Location, which may be hidden on a per user type level. If a standard req field is hidden for a user, that field will be automatically removed from the System profile.

* AutoReq ID / Optional req ID setting – Your organization’s AutoReq ID or Optional req ID settings are reflected in the following System profiles: Hired candidates, Reqs created, Open reqs, and Reqs closed. Based on your system configuration, either the AutoReq ID or Optional req ID is included automatically in the profiles.

Candidates loaded System profile

This System profile returns data for all candidates loaded to *Enterprise* in the past seven days.

Security levels

Security level	Security restrictions
Field-level	None
Candidate type	The user’s search privileges for Candidate types determine the type of candidate data the user may view in DEW results. For users who do not have privileges to search any Candidate types, this profile returns no data.

Org Group security	None
My/All req security	None

Output fields

Candidates loaded System profile fields (pulled from Candidate fields category)		
Candidate ref num	Date last loaded	Degree
First name	City	Field of study
Middle Name	Location	Employer
Last name	Country	Position held
Candidate type current type	Educational institute	Last codes

Filter criteria

Filter type	Filter values	The filter selects...
Resume/CV	Select candidates to search	All candidates
	Candidate type	All of the candidate types for which the user has search privileges based on user-type privileges, with the exception of the Erased candidate type
	Date last loaded	Last 7 days
	Duplicates	Suppress duplicate records

Hired candidates System profile

This System profile returns data for all candidates hired in the past seven days.

Security levels

Security level	Security restrictions...
Field-level	None
Candidate type	The user's search privileges for candidate types determine the type of candidate data the user may view in DEW results. For users that do not have search privileges for candidate types, this System profile returns no data.
Org Group security	None
My/All req security	None

Output fields

Hired candidates System profile fields	
Candidate ref num (Candidate fields)	HR status (HR status fields)
First name (Candidate fields)	Action date (HR status fields)
Last name (Candidate fields)	Auto req (Req fields (standard Req))*
Candidate type original type (Candidate fields)	Job Title (Req fields (standard Req))
Date last loaded (Candidate fields)	Job Code (Req fields (standard Req))

Filter criteria

Filter type	Filter values	The filter selects...
HR Status	Select candidates to search	All candidates in req and working folders

Candidate type	All of the candidate types for which the user has search privileges based on user-type privileges, with the exception of the erased candidate type
HR Status date range	Last 7 days
Activity	All current and historic hr status data
HR status	HR statuses configured as “Hired” statuses for reporting purposes in <i>Workbench</i> will be automatically selected
Duplicates	Suppress duplicate records

Reqs created System profile

This System profile returns data for all requisitions created in the past seven days.

Security levels

Security level	Security restrictions
Field-level	The user sees all fields that are not hidden for the user’s user type as output fields.
Candidate type	There are no candidate type security restrictions because no candidate data appear in this profile. The candidate types for which you have search privileges are automatically selected in the profile.
Org Group security	Only requisition data specific to your Org Group association will appear on the Req filter and in the export results.
My/All req security	Export results return only the requisition data specific to the user’s req status viewing privileges

Output fields

Reqs created System profile fields (pulled from Req (standard) category)	
AutoReq ID*	Department
Date created	Manager
Status	Recruiter
Title	No. of Positions
Job Code	Positions Remaining
Location/Division	

Filter criteria

Filter type	Filter values	The filter selects...
Requisition	Candidate type (optional)	All of the candidate types for which the user has search privileges based on user-type privileges, with the exception of the Erased candidate type
	Languages	All
	Date created	Last 7 days
	Suppress duplicates	Suppress duplicate records

Open reqs System profile

This System profile returns data for all requisitions currently in an open status.

Security levels

Security level	Security restrictions
Field-level	The user sees all fields that are not hidden for the user's user type as output fields.
Candidate type	There are no candidate type security restrictions because no candidate data appear in this profile. The candidate types for which you have search privileges are automatically selected in the profile.
Org Group security	Only requisition data specific to your Org Group association appears on the Req filter and in the export results.
My/All req security	Export results return only the requisition data specific to the user's req status viewing privileges

Output fields

Open reqs System profile fields (pulled from Req (standard) category)	
AutoReqID *	Location/Division
Date created	Department
Date open	Manager
Days open	Recruiter
Status	No. of Positions
Title	Positions Remaining
Job Code	

Filter criteria

Filter type	Filter values	The filter selects...
Requisition	Candidate type	All of the candidate types for which the user has search privileges based on user-type privileges, with the exception of the Erased candidate type
	Status	Open
	Languages	All
	Duplicates	Suppress duplicate records

Reqs closed System profile

This System profile returns data for all requisitions closed in the past seven days.

Security level

Security level	Security restrictions
Field-level	The user sees all fields that are not hidden for the user's user type as output fields.
Candidate type	There are no candidate type security restrictions because no candidate data appear in this profile. The candidate types for which you have search privileges are automatically selected in the profile.
Org Group security	Only requisition data specific to your Org Group association appear on the Req filter and in the export results.
My/All req security	Export results return only the requisition data specific to the user's req status viewing privileges

Output fields

Reqs closed System profile fields (pulled from Req (standard) category)	
AutoReqID*	Job Code
Date created	Location/Division

Date closed	Department
Days open	Manager
Status	Recruiter
Title	No. of Positions

Filter criteria

Filter type	Filter values	The filter selects...
Requisition	Candidate type	All of the candidate types for which the user has search privileges based on user-type privileges, with the exception of the Erased candidate type
	Languages	All
	Date closed	Last 7 days
	Duplicates	Suppress duplicate records

Benefits

System profiles increase the usability of the DEW for new system users and provide a starting point for the creation of more advanced DEW profiles.

New functionality or replacement

This is new functionality.

New Terminology

Term	Description
System profiles	DEW provides five standard system profiles for use by users with DEW user-type privileges: Candidates loaded, Hired candidates, Open reqs, Reqs closed, and Reqs created. System profile settings reflect the most frequently executed DEW queries across all BrassRing clients.
My profiles	<i>Enterprise</i> users with DEW privileges can create and save their own DEW profiles for frequently executed queries.

Overview of implementation

This functionality will be automatically available for all *Enterprise 9* users with DEW access privileges.

Cost

There is no cost for this feature.

eLink authentication

As of this release, clients (including those using Single-sign-on encryption) can choose to turn on eLink authentication. ELink authentication validates and authenticates users who attempt to open eLinks, ensuring that eLinks are opened only by the intended recipients, protecting you against unauthorized access to sensitive data. eLink authentication is configured by BrassRing, and can be used with or without *Enterprise* Single-sign-on.

When eLink authentication is turned on, the ability to send eLinks to non-system users is eliminated except for the ability to send BLANK forms to a specific *candidate* (using the candidate's contact e-mail address stored in his/her Talent Record). There is no ability to enter an e-mail address as an eLink recipient.

When the eLink authentication is not activated, eLink recipients can access all eLinks whether or not they are the intended recipient and even if they have no *Enterprise* or Talent Gateway account, as per current functionality.

Workflows affected by eLink authentication

Enterprise provides the ability to send or embed eLinks in the context of several workflows. The table below summarizes the behavior of eLinks when eLink authentication is turned on and off (the default setting). In most cases, turning eLink authentication on removes the ability to send eLinks to non-system users, but there are some exceptions.

Task	Authentication off (default)	Authentication on
eLink a blank req	Senders can select system and non-system users as recipients of eLinks.	Senders can select only system users as recipients of eLinks.
eLink a completed Req for view or edit		
Route Req for approval		
eLink Candidate CV/Completed Forms		
FWD Candidate resume via email	Organizations that already use this feature will see no change in its functioning unless they decide to turn it off. Users with the appropriate user type privilege will continue to be able to forward a candidate's resume text via email.	
eLink Blank Form to candidate	Senders can select system users or enter the e-mail addresses of non-system users as recipients of the eLink.	Senders can select a candidate's name if the e-mail address is stored in the candidate's Talent Record. If there is no e-mail address stored for the candidate, the candidate's name is not available for selection.
eLink and Send Candidate Communications	Clients must be able to add forms via eLink and e-mail templates which will be used by their users as the basis of communication to candidates who may or may not have a Talent Gateway account. The system does not authenticate eLinks for Send (Candidate) Communications.	
eLink DEW	Senders can select system and non-system users as recipients of eLinks.	Senders can select system users as eLink recipients, and recipients are authenticated.
eLink and Scheduling	Senders can select system and non-system users as recipients of eLinks.	Senders can select system users as eLink recipients, and recipients are authenticated.
eLink and Job Posting Preview	Senders can select system and non-system users as recipients of eLinks.	Senders can select system users as eLink recipients, and recipients are authenticated.
eLink and Talent Comparison Summary	Senders can select system and non-system users as recipients of eLinks.	Senders can select system users as eLink recipients, and recipients are authenticated.

eLink and Agency Manager	For organizations that use both Agency Manager and eLink authentication, eLink and Agency Manager work the same as in past releases. Senders can send information via eLink to agency staff; these links are not authenticated because agency staff does not have accounts against which authentication can take place. This feature works the same as in the past.	
eLink and e-mail notification	The system notifies the recruiter by e-mail when a candidate has completed an eLink form. The notification e-mail contains a link to both the completed form and to <i>Enterprise</i> .	The notification eLink and the access eLink to <i>Enterprise</i> are both authenticated.

eLink authentication and Single-sign-on

ELink authentication is available for clients who use single-sign-on encryption (see page 112 for more information). If your organization has both eLink authentication and single-sign-on encryption enabled, the authentication process gives recipients access to the contents of the eLink only after the user is authenticated. Users maintain all user privileges as determined by their account settings. If authentication fails, an error message is displayed. Error messages are not logged.

If the client does not have single-sign-on encryption enabled, the eLink authentication process takes the user to the *Enterprise* login page, where the user enters his/her *Enterprise* username and password. If the user is a validated system user, the contents of the eLink are displayed. Users maintain all user privileges as determined by their account settings. The existing eLink and log-in configuration options for that client determine how many attempts users may make to open each generated link.

The standard “forgot my password” functionality works as it did in past releases.

Best practice recommendations

BrassRing recommends that eLink authentication be turned on.

The eLink authentication setting has no impact on external req URLs. It is recommended but not required that the external req setting be set to “None.”

Benefits

This feature protects client sites from unauthorized access to sensitive data.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature is available to all BrassRing clients, but must be activated by BrassRing.

Implementation decisions

Clients must think about the impact of eLink authentication on their users' workflow.

Cost

There is no cost for this feature.

Configurable eLink Respond button text

Clients can now configure the instruction text which displays next to the **Respond** button on an eLinked Talent Record. The instructions for the candidate Talent Record eLink **Respond** button default to the current text of “Click to send your feedback on this candidate:” You can substitute replacement instructions of up to 500 characters. You can tag these instructions in HTML. **Enterprise** renders the HTML and wraps the text properly when displaying it. Instructions are translatable for all purchased *Enterprise* UI locales.

Benefits

This feature allows clients to customize instruction text next to the eLink **Respond** button.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature is available to all clients but must be enabled by BrassRing.

Cost

There is no cost for this feature.

Configurable eLink Respond to text

You can change the instructional text that appears to the left of the eLink **Respond** button.

To customize the “respond to” instructions for eLinks, do the following:

1. Log into *Workbench*.
2. Select **Tools > Settings > Instructions > eLink respond instructions**.
3. On the eLink respond instructions page, enter your customized text in the **Respond Instructions** text box. The default text is “Click to send your feedback on this candidate.”
4. Click **Preview** to see how the customized text will look to users.
5. Click **Save** to save your changes. (Click **Cancel** to close the window without making changes. Click **Revert to saved** to go back to a prior saved version if you have not yet saved your changes.)
6. If you have changed the eLink Respond instruction text and saved it, you can click **Set to default** to restore the default text for the button.



The screenshot shows a web interface for configuring eLink respond instructions. At the top, there is a navigation bar with 'Tools' and 'Admin' dropdown menus, and links for 'Home', 'Help', 'Support', 'Resource Center', and 'Logoff'. Below the navigation bar, there is a 'Change password' button and an 'Audit Trail' link. The main content area is titled 'eLink respond instructions' and contains a text box for 'Respond Instructions' with the default text 'Click to send your feedback on this candidate:'. To the right of the text box, there is a language dropdown menu set to '[English (US)]' and buttons for 'Set to default' and 'Preview'. At the bottom of the page, there are three buttons: 'Save', 'Revert to saved', and 'Cancel'.

Benefits

You can clarify instructions for responding to eLinked materials.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature is configurable by *Workbench* users.

Implementation decisions

Users must decide what the eLink respond button text should say.

Cost

There is no cost for this feature.

Auto-launch Gateway Questionnaire

Recruiters can invite candidates to fill out a Gateway Questionnaire by sending an embedded link to a Gateway URL by e-mail.

When the e-mail recipient clicks the embedded link, the Gateway Questionnaire launches automatically. Candidates can fill out the Gateway Questionnaire without interacting with the Talent Gateway site; this means the candidate does not have to go to the site, create an account, and log in.

The auto-launch Gateway Questionnaire works identically to Gateway Questionnaires accessed through Talent Gateways. However, it does not include the “Save as draft” feature.

Best practice recommendations

BrassRing recommends that the Gateway Questionnaire “login” and “create login” pages be disabled.

Benefits

This feature increases recruiter efficiency and the responsiveness of recruiters and candidates.

New functionality or replacement

This is new functionality.

Details/limitations/workarounds

As mentioned above, BrassRing recommends that the Gateway Questionnaire “login” and “create login” pages be disabled.

If your organization enables auto-launch and decides to keep the two login pages enabled, the functionality available to candidates depends on the configuration of the specific Gateway Questionnaire. The candidate cannot access a Talent Gateway through the auto-launch Gateway Questionnaire. However, the candidate may be able to access (after logging in or creating a login) some or most of the functionality associated with the “Edit profile” and “Resume/CV manager” features that are available through the Talent Gateway. For example, a candidate with a previously created profile can access most of the functions associated with the “Edit profile” feature, such as saved resumes, cover letters, and contact information through the auto-launch Gateway Questionnaire; or a candidate can create a new resume and cover letter, functions available through the “Resume/CV manager” feature.

The “Save as draft” feature cannot be used for candidates accessing the Gateway Questionnaire, whether through a link in e-mail or through a link on a client’s website.

Overview of implementation

The auto-launch Gateway Questionnaire is available for Basic and Full Talent Gateways. The feature must be configured by BrassRing, and requires the dedicated use of a Basic or Full Talent Gateway site. Please contact your BrassRing representative for more information.

Implementation decisions

Decide if a direct link to a Gateway Questionnaire is needed, and if so, which Talent Gateway site can be dedicated for this purpose.

Cost

There is no cost for this feature.

Gateway Questionnaire login configurability

There is new setting for administering the Gateway Questionnaire login feature which requires the candidate to log in. Clients may now elect to give the choice to the user to log in, create a login (and log in), or bypass login; require a login; or bypass login altogether for users trying to access the Gateway Questionnaire. See “BrassRing 9 Release Notes – Workbench” for more information.

When this new setting is turned on, candidates must use an existing valid login or create a login in order to access the Gateway Questionnaire.

Best practice recommendations

As a best practice, we strongly recommend that you use the setting “Do not prompt for login” for the Login setting for the Gateway Questionnaire.

Benefits

This additional choice for login settings give clients greater control and specificity when granting access to the Gateway Questionnaire.

New functionality or replacement

This is new and replacement functionality.

Details/limitations/workarounds

For any Talent Gateway with log-in disabled, the login settings to require log-in and Suggest log-in are ignored. If log-in is not allowed on the regular Talent Gateway, Gateway Questionnaires associated with it do not display any login options regardless of Gateway Questionnaire settings. This also means that a single Gateway Questionnaire may act differently on different Talent Gateways in regard to login behavior.

Overview of implementation

Workbench Certified users can activate this new setting after implementing and being trained on Gateway Questionnaires.

Implementation decisions

Clients must decide which Gateway Questionnaire login settings meet their security and ease-of-access needs. For clients that use many Talent Gateways, settings may differ depending on the type of Gateway and typical Gateway users for a specific Gateway.

Cost

There are no costs for this feature.

Limit access to candidates by HR status

By limiting access to candidates according to their HR status, organizations will find it easier to protect the privacy of candidate data during the hiring process. For example, in some cases hiring managers are not allowed to see information for candidates who have not yet been screened or were already rejected by recruiters.

To meet these requirements, clients can now elect to turn on a new user-type privilege that limits which user types can see candidates in specific HR statuses for candidates filed to req folders. When this user-type privilege is turned on, the affected users do not see the candidates in the forbidden HR statuses within the req folder.

Example

Assume you are working with the following candidates and you have user-type privileges that allow you to see the “Screen” and “Interview” HR statuses.

Candidate	Req	HRstatus
Jenny Jones	123BR	Screen
	456BR	Not Qualified
Frank Smith	123BR	Not Qualified
	456BR	Screen
Sally Quick	123BR	Interview
Mark Martin	456BR	Interview

- When you are in the Req Folder associated with 123BR, you see Jenny Jones and Sally Quick.
- When you are in the Req Folder associated with 456BR, you see Frank Smith and Mark Martin.
- Using Quick search or Candidate search, you can see all of these candidates.

When the user-type privilege is turned on, the candidate count displayed at the top of the req folder “Showing candidates X of Y Selected candidates” reflects the number of candidates displayed in the folder (given the user’s restrictions), not the total number of candidates in the folder

Benefits

This feature will help clients to meet privacy requirements for candidate information as candidates move through the hiring process.

New functionality or replacement

This is new functionality.

Details/limitations/workarounds

There is no change to current behavior unless the new user-type privilege is assigned to user-types. When enabled, the feature does not extend to candidates viewed through Candidate Search, Quicksearch, DEW, reporting, or any other mechanism. It applies only to candidates displayed within a req folder.

Users can move candidates to any HR status allowed by the organization's candidate-tracking logic, even if it is to a status for which the user can't view candidates. When a candidate is moved to a non-viewable status for that user, the candidate's name disappears from the candidate grid when the page is refreshed.

Overview of implementation

This feature is available to all clients but must be enabled by BrassRing. Please contact your BrassRing representative for more information.

Cost

There is no cost for this feature.

Seven-day posting rule for HR status updates

Your organization can block updates to selected HR statuses for a candidate filed to a requisition when that requisition is posted to a Talent Gateway for less than eight days. The “block HR Status update” option can be turned on for any HR status and is in effect only when the requisition has an active posting that has not satisfied the seven-day posting requirement.

When this feature is turned on, the ability to update a candidate to a “blocked” HR applies in two cases:

- *Enterprise* users cannot update the blocked HR statuses of candidates manually
- Candidate import cannot update blocked HR statuses automatically

Rules for the seven-day posting period

The seven-day posting period is determined using the following rules:

Calculation start – The seven-day period starts when the requisition (to which the candidate is filed) is posted to a Talent Gateway. The calculation of the seven-day posting requirement is based on calendar days from the date the requisition is posted.

Reposting – The seven-day calculation starts again if you repost or refresh the requisition prior to the seventh day. For example, if you post the position to a Talent Gateway and refresh the posting on day 6, you cannot update a candidate to a blocked HR Status for seven days from the refreshed post date.

Future posting date – If you select a future posting date, *Enterprise* calculates the seven-day posting based on the date when the position is actually posted. For example if you select “7” for days until posting, you cannot update a candidate to the blocked status until day 15.

Req status changes to On Hold – If you or someone changes the requisition’s status to On Hold, the req posting(s) are automatically removed from the Talent Gateway(s), except in the following circumstances: If you click the Edit Talent Gateway option at the time of putting the req On Hold, the req remains posted and the post date reflects the date the Req was put On Hold. When you remove the req from On Hold, you can edit the affected Talent Gateway(s) and select either the “repost” or “no repost” option. If the job is reposted, the post date reflects the date you removed the req from On Hold.

Best practice recommendations

If a user clicks the **OK** or **Refresh** buttons while on the Talent Gateway options page, the posting date for all posted Gateways is refreshed to Today’s date, regardless if any changes were made.

If a user is only viewing the Talent Gateway Options page and does not make any changes, BrassRing recommends that s/he click Cancel to close the page.

If a user is trying circumvent the blocked period, s/he can remove the posting from all Talent Gateways and the blocked period no longer applies.

Requisitions must be posted to a Talent Gateway in order for blocking of HR status updates to take place; the block is based on the position having an active posting that has not satisfied the seven day posting requirement.

Benefits

Clients can enforce a seven-day posting requirement for jobs by blocking updates to specified HR statuses for candidates filed to those requisitions.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature is available to all BrassRing clients but must be enabled by BrassRing.

Implementation decisions

Clients must determine if enforcing a seven-day posting requirement is beneficial to them and which statuses they would want to block from being updated during the seven day period.

Cost

There is no cost for this feature.

Job posting Preview

Organizations using Full and Global Talent Gateways can enable and use the job posting preview feature. Global Talent Gateways list member sites with translated job requisitions, allowing users to preview and/or eLink a job posting in a translated language.

When it is enabled, Enterprise users can preview (at several different places in their workflow) job requisitions as they would appear after being posted to a Talent Gateway site. Users can also eLink job requisition previews to recipients.

The job posting preview button is available in the following situations:

- On the Req detail screen for a specific req. Click Select job posting preview.
- On the Posting options screen for Open req <req. no.>, select one or more Talent Gateways and click Select Job posting preview.
- From the Select job posting preview window accessed from within Enterprise. You can select Talent Gateways and send eLink of the Job posting preview from this window.
- From the Select job posting preview window accessed via eLink. This page displays the client logo.
- The job posting preview is available for all job requisitions accessed from within Enterprise and all requisition statuses. All existing job requisition user privileges are maintained.

The job posting preview is available for all job requisitions accessed from within *Enterprise* and all requisition statuses. All existing job requisition user privileges are maintained.

The job posting preview is not directly editable, but users can copy and paste the job posting preview text.

A user can preview multiple job postings in different Job posting preview windows simultaneously.

Multiple users working in Enterprise can preview one job posting at the same time.

Job posting previews are not available for a Talent Gateway site that is deactivated after an eLink was sent.

Benefits

This feature allows a recruiter to preview how the req will appear on a Talent Gateway before it is posted to the Gateway. It also makes it easier for recruiters to review, share, and comment upon one or several requisitions before posting them.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature must be turned on by BrassRing. Please contact your BrassRing representative for more information.

Cost

There is no cost for this feature.

To preview a job before posting it

When viewing req details for a specific req:

1. Click the link for a specific req in any status in the View all reqs: [Req status] or View my reqs: [Req status] output grid. The Req details page for that req appears.
2. Click the **Select job posting preview** button. The Select job posting preview page appears.
3. Click the magnifying glass icon in the **Preview job posting** column associated with the Talent Gateway or Agency Manager to which you are posting the job. The Job posting preview window appears, displaying a formatted version of the req.



Note: The requisition's contents are the same no matter which Preview job posting icon you select in the list of Talent Gateways and/or Agency Managers.

When viewing reqs in any status:

1. Navigate to the View all reqs: [Req status] or View my reqs: [Req status] page.
2. Select the radio button for a req in the Open reqs output grid.
3. Click the **Select job posting preview** option in the Actions menu. The Edit job posting options page appears.

4. To view the job posting preview for the selected req, click the **Select job posting preview** button. The Select job posting preview page appears.
5. Click the magnifying glass icon in the Preview job posting column associated with the Talent Gateways or Agency Managers to which you are posting the job. The Job posting preview window appears, displaying a formatted version of the req.
6. Note: The requisition's contents are the same no matter which Preview job posting icon you select in the list of Talent Gateways and/or Agency Managers.
7. When editing posting options for a req:
8. Navigate to the View all reqs: [Req status] or View my reqs: [Req status] page.
9. Select the radio button for a req in the Open reqs output grid.
10. Click the **Posting options** option in the Actions menu. The Edit posting options page for the req you selected appears.
11. To view the job posting preview for the selected req, click the **Select job posting preview** button. The Select job posting preview page appears.
12. Click the magnifying glass icon in the Preview job posting column associated with the Talent Gateways or Agency Managers to which you are posting the job. The Job posting preview window appears, displaying a formatted version of the req.

Note: The requisition's contents are the same no matter which Preview job posting icon you select in the list of Talent Gateways and/or Agency Managers.

From the [View job posting preview](#) eLink sent via e-mail

1. Open the e-mail containing the eLink.
2. Click the View job posting preview link. The job posting preview displays in the recipient's browser. It includes the client logo for the sender's company.

When you click the **Preview job posting** icon, the requisition appears as in the example screen capture above.

eLinking job posting previews

You can eLink the job posting preview from the Select job posting preview page to one or more recipients. Recipients can be system and non-system users. When the recipient clicks the eLink, the Job posting preview page opens.

You can also eLink several job posting previews destined for different Talent Gateways. When the recipient clicks the eLink, the Select job posting preview page opens. It lists each Talent Gateway selected by you (the sender) of the eLink.

In Global Talent Gateways, you can eLink job postings for translated job requisitions for all member sites.

The job posting preview is available for all Job requisitions accessed from within *Enterprise* and all requisition statuses. All existing Job requisition user privileges are maintained.

The job posting preview accessed via eLink is always the latest version of the job posting preview as per eLink functionality. Job posting preview links never expire, regardless of your organization's expiration settings for other types of eLinks.

When the recipient clicks the eLink, the Job posting preview window opens.

To eLink a job posting preview

On the Select job posting preview page, follow these steps:

1. Check the checkbox(es) for the Talent Gateway(s), Agency Manager(s), and/or posting partners whose job posting previews you want others to review.
2. Click **Send eLink**. The eLink job posting preview page for the <Req. No.><Job Title> appears.
3. Fill in the fields.

Field	Description
From*	Typically, your system e-mail address populates the From field automatically. This is the only required field (indicated by the red asterisk *).
To: (system-users)	Select one or more system users from the list box. You must select at least one recipient from either the system users or non-system users list.
To: (non-system users)	Enter valid e-mail addresses for one or more non-system users in the text box. You must select at least one recipient from either the system users or non-system users list.
Subject:	The req number and title populates the Subject field automatically.
Your message	Enter your message in the text area box.

4. Click **Send** to send the eLink(s). A confirmation window appears. (Click **Cancel** to close the page without changing or sending anything. Click **Clear** to empty the fields and start over again, if desired.)

5. Click **OK** in the confirmation window to close it.

Deactivated Talent Gateway sites

Job posting previews eLinks are not available for a Talent Gateway site that is deactivated after an eLink was sent except in the following circumstances:

- The user accesses a job posting preview by eLink. The Talent Gateway site which the eLink accesses was deactivated at some point after the job posting preview eLink was sent, and before the eLink recipient attempted to preview the job posting.
- The job posting preview was sent as eLink for more than one Talent Gateway site where at least one site is still active.

The system displays an error message when users attempt to access the job posting preview window by eLink and the Talent Gateway site has been deactivated.

Job requisition eLink history

Sending a Job requisition preview as an eLink creates a Job requisition eLink history. The system records the date when the eLink was sent and the date the recipient clicked upon it, but not the date that the job posting is previewed.

The eLink history is available for Job requisitions accessed from within Enterprise and via eLink, and is displayed in the Job requisition detail window. It provides the following information: Sender name, Recipient name/e-mail, eLink sent (date), and eLink opened (latest viewed date).

RecruitUSA has changed its name to Arbita

BrassRing's posting partner, RecruitUSA, has changed its name to Arbita.

All instances of the name, RecruitUSA or RUSA have been updated in *Enterprise*.

Candidate activity report has visible e-mail address

The data in the e-mail address field is decrypted. The e-mail address returned in this report can be used for candidate marketing efforts.

Diversity hires report

These are the changes to the Diversity hires report in *Enterprise9*:

- Report filter page:
 - BrassRing implemented security for requisition-based filter fields.
 - Your organization can exchange standard requisition-based filters (Location/Division, Department, Manager, and Recruiter) for custom requisition-based filter fields.
- Report output:
 - Your organization can exchange the existing standard requisition-based output fields and sort/group options (Location/Division, Department, Recruiter, and Manager) for custom requisition-based output fields and sort/group options.
 - BrassRing has:
 - implemented security for requisition-based output fields and for sorting/grouping options
 - added the Candidate type heading
 - added “Totals per candidate type”
 - modified the Report logic to consider a specific ‘instance’ of a candidate type

Report filter page

This section describes changes to the filter page for this report.

Security for requisition-based filter fields

BrassRing applies organizational group and field-level security to the Location/Division, Department, Recruiter, and Manager fields or any configured custom requisition field-based filter. On the filter page, you can see only those requisition-based filter options consistent with your organizational group association and field-level user type viewing privileges. See page 75 for more information on security implementation.

Customizable requisition field filters

Your organization can exchange four of the standard requisition field-based filters, Location/Division, Department, Manager, and Recruiter, for custom requisition-field based filters. See page 77 for more information about this functionality.

Report output

This section describes changes to the output for this report.

Customizable requisition field output columns and sort/group options

Your organization can exchange four of the standard requisition field-based output fields and sort/group options, Location/Division, Department, Manager, and Recruiter for custom requisition-field based filters. See page 77 for more information about this functionality.

Security for requisition-based output fields and sort/group options

BrassRing applies organizational group and field-level security to the Location/Division, Department, Manager, and Recruiter or any configured custom requisition field-based output field and sort/group option in the Diversity hires report. In the report results, you can see only the requisition-based sort/group options for which you have viewing privileges based on your existing organizational group association and field-level user type viewing privileges.

If you do not have privileges to the data in the requisition-based output fields, the data in the column is replaced with an asterisk (*).

BrassRing applies Candidate type and My/All req security levels to the report results. The report returns candidate data only for candidates associated with the candidate types for which you have search privileges. The report returns req data for requisitions for which you have viewing privileges.

Candidate type heading

A new heading, “Candidate type” has been added to the report output. Report results will now be grouped by the individual candidate types returned in the report, regardless of how the report is re-sorted or grouped. This heading will appear as a separate column in the results when the report is generated in Excel Sortable format.

Candidate type totals

In *Enterprise 9*, the Diversity hires report will display the total number of hires for each distinct candidate type returned in the report.

Report logic modification: Candidate type “instance”

Your organization can specify which ‘instance’ of a candidate’s candidate type should be considered when returning results in the Diversity hires report.

You can select “Current,” “Previous,” or “Original” for Candidate type instance. The “Current” option is selected by default to match how the report returned data prior to *Enterprise 9*.

Instance	Action
Current	If you select “Current,” the report uses the candidate’s existing candidate type as of the report execution date. This means if your <i>Enterprise</i> system has been configured to automatically change the candidate type of all ‘hired’ candidates to “Internal,” all hires are reported as “Internal.”
Previous	If you select “Previous,” the report returns data based on the candidate’s candidate type prior to the hire action being taken.

Original	If you select “Original,” the report returns data based on the candidate’s candidate type when initially loaded into <i>Enterprise</i> , and ignores changes to candidate type that have occurred since.
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Candidate type instance is configured by BrassRing. The instance configuration is applied to both the Diversity hires report and panel.

Diversity hires panel

Your organization may now customize which candidate types are displayed on the Diversity hires panel. Up to five candidate types, custom or standard, may be displayed. This capability is configured by BrassRing.

Security checks are not applied in the Diversity hires panel because no individual requisition or candidate information is available.

Reports Enhancements

BrassRing 9 introduces several improvements to reports:

- a redesigned user interface for the reports module
- multi-level security checks for several standard reports
- customizable filters and output fields for six standard reports
- enhanced filters for individual standard reports
- enhanced report output for individual standard reports
- miscellaneous improvements

Standard report security enhancements

BrassRing has implemented four levels of enhanced security (Organizational group, Form-field, Candidate type, and My/All reqs) in the Reports module for seven standard reports: System user, HR action activity, New hire, Open req activity, Req status summary, Diversity hires, and Time to fill.

The enhanced security levels ensure access to the data within the above standard reports is in keeping with users' existing *Enterprise* data access privileges. The specific effects of security enhancements are described in the detailed sections below.

How security affects you

Your access to data within *Enterprise* is controlled through the specific user type and organizational group to which you belong and the access privileges granted to that user type and/or organizational group. Your access to specific filters, output fields or sort/group options in Standard reports is now controlled through the same user type and organizational groups associations.

Your specific user type and organizational group associations are determined by your organization in consultation with your BrassRing representative, and configured by BrassRing. If you find that you need access to reports or specific areas within reports that you do not have currently, please see your system administrator.

Organizational group security

The organizational group(s) to which you belong determine which req template(s) and associated req fields you are privileged to see in *Enterprise*. Within the enhanced Standard reports you can see filters and output columns corresponding to those requisition fields for which you have user privileges.

If you do not have privileges to view a particular req field-derived output field, the data in that output column are replaced with an asterisk (*). and the associated filter and sort/group option for that field is removed.

Field-level security

This level of security is applied only to reports containing requisition fields.

In *Enterprise*, the req form-level setting, “Hide for these user types,” controls your ability to view specific requisition fields. If your user type is selected for a specific requisition field, you will not be able to see the field on the requisition; you can see filters corresponding to those requisition fields for which you have user privileges.

If you do not have privileges to view a particular requisition output field, the data in that output column are replaced with an asterisk (*). and the associated sort/group option for that field is removed.

My/All req security

This level of security is applied only to reports containing requisition fields.

Your access to requisitions is handled through a series of ‘My’ and ‘All’ req status user-type privileges. For example, you may have the user-type privilege to view only ‘My’ Open status and ‘All’ Closed status reqs.

For Standard reports in this release you can see in your report output only the data associated with your specific ‘My’ or ‘All’ req status viewing privileges.

Candidate type security

Your user-type privileges determine which candidate types you can search on.

For example, if you do not have the privilege to search on candidates belonging to the ‘Internal’ candidate type, then you cannot retrieve data for any ‘Internal’ candidates when using the search functionality.

Your user privileges also determine which candidate type data are returned in report results. This level of security is applied only to reports containing specific candidate data, such as name or e-mail address.

Benefits

Multi-level security checks ensure the security and privacy of your organization’s data.

New functionality or replacement

This is new functionality

Overview of implementation

Report security enhancements are automatically implemented for all BrassRing clients based on users' existing user type and organizational group privileges.

Cost

There is no additional cost for this feature.

Standard report field configurability

Enterprise 9 presents significantly enhanced configurability to six standard reports: HR action activity, New hire, Open req activity, Req status summary, Diversity hires, and Time to fill.

Each of these reports has a set of four standard requisition fields (**Location/Division**, **Department**, **Manager**, and Recruiter) that are used as filters, output columns, and sort/group options. In *Enterprise 9*, clients can exchange one or more standard req fields in each report for other req fields of their choosing.

Note Enhanced report security is applied to all configured req fields. If you do not have access to a specific requisition field through your existing organizational group and user-type privileges, and that field has been configured in the place of a standard req field for a standard report, you will not see this field as a filter for the report, the sort/group option for this field will be removed, and the data within this field in the report output will be replaced with an asterisk (*).

Benefits

This enhancement will provide your organization with the ability to better configure the standard reports to meet your specific reporting needs.

New functionality or replacement

This is new functionality for the six reports listed above. This functionality is currently available within the Diversity breakdown report.

Details/Limitations/Workarounds

Fields are configured at the individual report level. This means your organization may choose to configure one set of fields for one standard report and a different set of fields for a second standard report.

Standard report field configurations are applied across *Enterprise*. Each user with access to a custom configured standard report will see the same field configuration across your entire system.

If your organization implements configurable fields with standard reports, these configuration changes may affect your established report schedules. See the next several sections for more information.

Configured report fields and report schedules

Currently, report scheduling is available for most standard reports. This functionality allows you to specify filter criteria for a standard report and then create a schedule for when this report should be executed and to whom it should be distributed.

With the introduction of configurable fields to several standard reports in *Enterprise 9*, it is possible that when a standard reporting field is exchanged for a custom field, the filter parameters used within existing report schedules may no longer exist.

For example, a report schedule exists for the Open req activity report using criteria within the standard “Location” filter. If the Open req activity report configuration is modified to replace the Location field with a custom requisition field called “Cost Center,” the parameters of the report schedule are now invalid because the “Location” filter does not exist.

To minimize the impact on your existing report schedules, BrassRing invalidates only those report schedules where a specific filter option selection was made. If the “All” option is used within a standard filter and that standard filter is subsequently exchanged for a custom filter, the existing report schedule remains active.

If you are the report schedule creator for a report that has undergone a configuration change, you will receive an e-mail notification for each affected report schedule. The notification informs you that one of two conditions applies to your report: The report configuration has changed but the report schedule is still operational, or the report configuration has changed and the report schedule has been voided.

If your organization does not implement the configurable fields functionality, there will be no impact to any existing report schedules.

Report schedule impact notification

When a report configuration is changed but the scheduled report(s) can still run, one e-mail notification is sent to the report schedule creator for each affected report. The e-mail describes the modified configuration, warns of possible changed output, and affirms the existing report schedule. The e-mail includes the report schedule details to help the schedule creator distinguish among different report schedules.

Report schedule void notification

When a report configuration is changed and invalidates the existing report selections, the existing report schedule is automatically voided and one e-mail notification is sent to the report schedule creator for each voided report. The e-mail describes the modified configuration, indicates that the report schedule is voided, and informs the report schedule creator that the schedule details will be available in the Reports queue for fourteen days. It includes the report schedule details to help the schedule creator distinguish among different report schedules.

New status of “Voided” for reports in the Reports queue

Due to the possible invalidation of report schedules, reports can have a report status of “Voided.” You can view details of the voided schedule for up to fourteen days following the report configuration change after which time it will be removed from the reports queue. If a

report schedule has a status of “Voided”, it cannot be edited. A new report schedule using the newly configured report filters must be created.

Overview of implementation

BrassRing implements configuration for Standard reports. Please contact your BrassRing representative to discuss the benefits of implementing configurable reporting fields in your organization.

Implementation decisions

Your organization does not have to take advantage of this functionality. The standard filter and output fields remain the default configuration.

Your organization should consider the impact of configuration changes on existing report schedules when deciding whether to implement configurable fields in any or all of their standard reports.

Cost

There is no cost for this feature.

HR action activity

The following are the enhancements and changes to this report in *Enterprise 9*:

- Report filter page:
 - BrassRing implemented security for requisition-based filter fields.
 - Your organization can exchange standard requisition-based filters (**Location/Division, Department, Manager, and Recruiter**) for custom requisition-based filter fields.
 - There is an expanded list of date range filters
 - The new filter “HR status” allows targeted selection of specific HR statuses.
 - Req ID is now a multiple select list.
 - You can now schedule this report.
 - BrassRing has changed the report logic to ensure that the data returned in the report are relevant to filter selections.
- Report output:
 - Your organization can exchange the existing standard requisition-based output fields and sort/group options (**Location/Division, Department, Recruiter, and Manager**) for custom requisition-based output fields and sort/group options.
 - BrassRing has implemented security for requisition-based output fields and for sorting/grouping options
 - Requisition data and candidate data are separated for ease of reading.

Report filter page

This section describes changes to the filter page for this report.

Security for requisition-based filter fields

BrassRing applies organizational group and field-level security to the **Location/Division, Department, Recruiter, and Manager** fields or any configured custom requisition field-based filter. On the filter page, you can see only those requisition-based filter options consistent with your organizational group association and field-level user type viewing privileges. See page 75 for more information on the security implementation.

In addition, BrassRing applies My/All req security to the Req ID filter. When using the Req ID filter, you can see only those req IDs for which you have viewing privileges. See page 75 for more information about security implementation.

Customizable requisition field filters

Your organization can exchange four of the standard requisition field-based filters, **Location/Division**, **Department**, **Manager**, and **Recruiter** for custom requisition-field based filters. See page 77 for more information about this functionality.

Expanded date range filters

The HR action activity report provides a full range of date filter options:

- a specific Begin and End date
- Month to date
- Previous calendar month
- Calendar quarter to date
- Previous quarter (for equivalent time period)
- Previous quarter (all)
- Calendar year to date
- Previous year (for equivalent time period)
- Previous year (all)

New HR status filter

The HR action activity report has a new required filter, HR status. Report results will now be returned based on the specific HR statuses you want to report on. A minimum of one HR status must be selected, up to a maximum of ten statuses.

Multiple selection list for choosing Req ID

The Req ID filter is now a multi-select list. You can select one or more Req IDs to include in the HR action activity report.

Schedule report option enabled

As of Release 9, you can schedule the HR action activity report. You can specify the duration and frequency for executing the report and maintain a list of individuals to whom the report is regularly distributed.

Modified report logic

The HR action activity report now returns data for all candidates moved to the HR statuses you select. Data is brought back based on the action date of the HR status, regardless of the candidate's current HR status. This enhancement enables reporting on historical HR status data and allows you to target your organization's specific HR status activity for a specific time period.

Report output

This section describes changes to the output for this report.

Customizable requisition field output columns and sort/group options

You can exchange four of the standard requisition field-based output fields and sort/group options, Location/Division, Department, **Manager**, and Recruiter for custom requisition-field based filters. See page 77 for more information about this functionality.

Security for requisition output fields and sort/group options

BrassRing applies organizational group and field-level security checks to the Location/Division, Department, Recruiter and **Manager** or any configured custom requisition field-based output field and sort/group options in the report. In the report results, you can see only those requisition-based sort/group options for which you have viewing privileges based on your Organizational group association and field-level user type viewing privileges.

If you do not have privileges to the data in the requisition-based output fields, the data in the column are replaced with an asterisk (*).

BrassRing applies Candidate type and My/All req security levels to the report results. The report returns Candidate data for candidates associated with the candidate types for which you have search privileges. It returns Req data only for requisitions for which you have viewing privileges.

See page 75 for more information on security implementation.

Revised report output format

The HR action activity output page displays requisition fields and candidate data in separate rows, providing more room for candidate HR status data. The HR statuses in the candidate section of this report are dependent upon the selections made for the HR status filter.

When you generate this report in the Excel Sortable format, all column headers contained in the PDF version of the report display in a single data row.

New hire report

These are the changes to the New hire report in *Enterprise 9*:

- Report filter page:
 - BrassRing implemented security for requisition-based filter fields.
 - Your organization can exchange standard requisition-based filters (**Location/Division, Department, Manager, and Recruiter**) for custom requisition-based filter fields.
- Report output:
 - Your organization can exchange the existing standard requisition-based output fields and sort/group options (**Location/Division, Department, Recruiter, and Manager**) for custom requisition-based output fields and sort/group options.
 - BrassRing has implemented security for requisition-based output fields and for sorting/grouping options

Report filter page

This section describes changes to the filter page for this report.

Security for requisition-based filter fields

BrassRing applies organizational group and field-level security to the **Location/Division, Department, Recruiter, and Manager** fields or any configured custom requisition field-based filter. On the filter page, you can see only those requisition-based filter options consistent with your organizational group association and field-level user type viewing privileges. See page 75 for more information on security implementation.

Customizable requisition field filters

Your organization can exchange four of the standard requisition field-based filters, **Location/Division, Department, Manager, and Recruiter**, for custom requisition-field based filters. See page 77 for more information about this functionality.

Report output

This section describes changes to the output for this report.

Customizable requisition field output columns and sort/group options

Your organization can exchange four of the standard requisition field-based output fields and sort/group options, Location/Division, Department, **Manager**, and Recruiter for custom requisition-field based filters. See page 77 for more information about this functionality.

Security for requisition output fields and sort/group options

BrassRing applies organizational group and field-level security to the Location/Division, Department, **Manager**, and Recruiter or any configured custom requisition field-based output field and sort/group option in the New hire report. In the report results, you can see only the requisition-based sort/group options you have the privileges to view based on your existing Organizational group association and field-level user type viewing privileges.

If you do not have privileges to the data in the requisition-based output fields, the data in the column are replaced with an asterisk (*).

In addition, BrassRing applies Candidate type and My/All req security levels to the report results. The report returns candidate data for candidates associated with the candidate types for which you have search privileges. The report returns req data only for requisitions for which you have viewing privileges.

OFCCP search activity report

The OFCCP search activity report lists the searches performed within a specified date range by *Enterprise* users, and the Requisitions *or* Search reasons associated with those searches.

Note This report is available only for clients using the OFCCP search logging functionality, which BrassRing made available to *Enterprise* clients on February 1, 2006. The start date for data returned in the OFCCP search activity report is the date on which this feature is enabled for your organization.

Executing and scheduling the report

The report is included in the list of Standard reports. To execute this report, users must have one of the existing “ReqID to conduct search” privileges as well as the new privilege for the OFCCP search activity report enabled.

Uses

- The summary version reports on which users conducted searches within the selected time frame.
- The detail version returns the actual search criteria used when the search was conducted.

Filters

Summary report

The summary version lists users who conducted searches within a selected time frame.

Filter	Description
Select report type	Summary (no search criteria)
Select date range *	<p>This field is required. If you do not select a date range, or select an incomplete or incorrect date range, the Reports module displays an appropriate error message when you click Generate now or Schedule report.</p> <p>Predefined options are based on calendar year:</p> <ul style="list-style-type: none">• Begin date: The earliest date that may be entered in for this field is 01-Feb-2006.• End date: You can select a maximum range of 366 days.• 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)

Make at least one (1) selection from the filter options below:

User(s)	<p>Select a maximum of 25 users from a multi-select or scaled-select list (for lists exceeding 199 users) for whom you are retrieving information about search activity.</p> <p>When you select one or more Users as a filter, the report returns all logged OFCCP search activity for the selected User(s) within the selected date range.</p> <p>Org group security is applied to this filter. Only the names of system users belonging to the Org Groups with which you are affiliated appear in the list of users available for selection.</p> <p>For example, if you belong to Org Group A, the list of users available for selection are the members of Org Group A.</p> <p>Similarly, if you belong to Org Groups A and B, the list of users available for selection are the members of Org Group A and Org Group B.</p>
Auto or Optional Req ID	<p>Use this filter to report on search activity against specific requisitions. The report returns all logged OFCCP search activity for the selected Req ID within the selected date range.</p> <p>Based on your organization's system configuration, this filter lists either the BrassRing-generated AutoReq ID or the client-configured Optional Req ID.</p> <ul style="list-style-type: none"> You can select a maximum of 25 Req IDs. Org group security is applied to this filter. Only reqs associated with the Org Groups to which you belong appear in the selection list. <p>For example, you belong to Org Group A; Org Group A has access to Req template A only. Assume req 123BR was created using req template A and req 456BR was created using req template B. When you view the req ID filter, req 123BR is visible but req 456BR is not.</p> <ul style="list-style-type: none"> My/All Req security is applied to this filter. My/All req privileges are enforced through the req "View" user type privileges associated with each user. Within the Req ID filter, you see only those reqs for which you have view privileges in <i>Enterprise</i>. <p>For example, if you have the "My reqs – view open" privilege, when you view the Req ID filter, you see only those reqs for which you are either the creator, manager, recruiter, or on the req team; no other Req IDs are available in the filter.</p>
Search reason	<p>Use this filter to find all OFCCP search activity associated with a specific Search reason. (Note: Search reasons are configured by BrassRing)</p> <ul style="list-style-type: none"> You can select a maximum of 25 search reasons. <p>When you select a Search reason, the report returns all logged OFCCP search activity for the selected search reason within the selected date range.</p> <ul style="list-style-type: none"> This filter appears only for clients that have configured 'pre-defined' search reasons within their <i>Enterprise</i> system. If your system has been configured to allow free-form search reasons to be entered, this filter will not be visible on the filter page for this report.
Output format	Excel (.xls) Sortable is the only available output format for this report
Actions	<p>Generate now: Click to immediately execute the report.</p> <p>Clear: Click to remove selections made on the filter page.</p> <p>Cancel: Click to close the filter page.</p> <p>Schedule report: Click this button to launch the report scheduling page.</p>

Detail report

The detail version of this report returns the search criteria used when the search was conducted.

Filter	Description
Select report type	Detail (includes search criteria)
Auto or Optional Req ID	<p>Use this filter to report on search activity against specific requisitions. Based on your specific system configuration, this filter lists either the BrassRing-generated AutoReq ID or the client-configured Optional Req ID.</p> <ul style="list-style-type: none"> You can select a maximum of 25 Req IDs. <p>When you select a Req ID, the report returns all logged OFCCP search activity for the selected Req ID within the selected date range.</p> <ul style="list-style-type: none"> Org group security is applied to this filter. Only reqs associated with the Org Groups to which you belong appear in this filter. <p>For example, if you belong to Org Group A and Org Group A has access to Req template A only. Assume req 123BR was created using req template A and req 456BR was created using req template B. When you view the req ID filter, req 123BR is visible but req 456BR is not.</p> <ul style="list-style-type: none"> My/All Req security is applied to this filter. My/All req privileges are enforced through the req “View” user type privileges associated with each user. Within the Req ID filter, you see only those reqs for which you have view privileges in <i>Enterprise</i>. <p>For example, if you have the “My reqs – view open” privilege, when you view the Req ID filter, you see only those reqs for which you are either the creator, manager, recruiter, or on the req team; no other Req IDs are available in the filter.</p>
Search ID	<p>A Search ID is a unique identifier for each logged OFCCP search. A unique Search ID is returned for each row of data returned in the report. (Because of this, you may want to run a Summary report first to gather a list of Search IDs to be used to generate the Detail report.) You can enter a single search ID or multiple search IDs with each search ID separated by a comma. The filter accepts up to 4000 characters.</p> <p>The supported characters for this filter are numbers and commas only.</p>
Output format	Excel (.xls) Sortable is the only available output format for this report
Actions	<p>Generate report: Click this button to immediately execute the report.</p> <p>Clear: Click to remove selections made on the filter page.</p> <p>Cancel: Click to close the filter page.</p> <p>Schedule report: Click this button to launch the report scheduling page.</p>

OFCCP report output

Based on the report type selection made on the OFCCP search activity report filter page, the report output will either contain summary or detail search activity data.

Regardless of the report type selection, both Org Group and My/All Req security is applied to the report results.

Org Group security

The report results are based on the user's Org Group affiliation. It returns the following:

- Search activity data for users within their Org Group. The report returns data for searches performed only by users having the same Org Group affiliation as the user executing the report returned.
- Searches performed against specific requisitions that were created using req templates. The search returns only data for reqs created using a req template associated with the user's Org Group.

Searches associated with a Search reason as opposed to a requisition are exempt from this specific security check.

My/All Req security

Report results contain search data associated with requisitions for which the user has viewing privileges, based on the user's My/All req-viewing user type privileges. This security check is applied only to searches associated with a Req ID.

Summary report output

Output field	Description
Search ID	This is a unique identifier for each search. It can be used within the Detail report as filter criteria.
User	The name of the user who conducted the search.
Search date	The date the search was conducted (dd-mm-yyyy). Report results are sorted by Search date.
Search type	The type of search conducted: <ul style="list-style-type: none"> • Candidate Search • Saved search • My candidate search • Filter folder • Talent Match • Overnight search
Auto or Optional Req ID	The Auto or Optional Req ID (based on the client's system configuration) against which the search was conducted. You can conduct a search for a specific Req ID or a specific Search reason; not for both.
Search reason	The Search reason associated with the search. Data appears in this column only if the search is not associated with a specific Req ID. You can conduct a search for a specific Req ID or a specific Search Reason; not for both. Note: For users with the "ReqID to conduct search - required" user type privilege, no data appears in this column because searches conducted by this user type must be associated with a Req ID.

Note: Because of Excel limitations, this report returns the oldest 65,000 rows of data within the selected date range. A total result count is returned on 'Page 1' of the report results ("Displaying records X to Y of Z"). If the total count ("Z") exceeds 65,000, you should modify your filter criteria, especially the date range, to restrict the data set returned.

Detail report output

Filter	Description
Search ID	Unique identifier for a search. This column lists the BrassRing generated search ID associated with this logged search. The IDs returned in this column may be used as filter criteria within the detail version of this report.
User	The name of the user who conducted the search.
Search date	The date the search was conducted (dd-mm-yyyy). Report results are sorted by Search date.
Search type	The type of search conducted: <ul style="list-style-type: none"> • Candidate Search • Saved search • My candidate search • Filter folder • Talent Match • Overnight search
Auto or Optional Req ID	The Auto or Optional Req ID (based on the client's system configuration) against which the search was conducted. You can conduct a search for a specific Req ID or a specific Search reason; not for both.
Search reason	The Search reason associated with the search. Data appears in this column only if the search is not associated with a specific Req ID. You can conduct a search for a specific Req ID or a specific Search Reason; not for both. Note: For users with the "ReqID to conduct search - required" user type privilege, no data appears in this column because searches conducted by this user type must be associated with a Req ID.
Search criteria	The specific search criteria used for the search. The report lists multiple criteria in a single cell with terms separated by a semi-colon (;). If the criterion used for a search field = All, no results are returned in the column for this criterion. Because "All" is the default selection, selecting it as a criterion is equivalent to making no selection at all. Note: Search criteria are not translated; they are displayed in English only.

Benefits

This feature allows your organization to provide search activity documentation in case of OFCCP audit.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature is available to all *Enterprise* users who have the appropriate user type privileges enabled in *Workbench*.

Implementation decisions

Clients must determine which user types should be granted access to this new standard report.

Cost

There is no cost for this feature.

Open req activity

These are the changes to the Open req activity report in *Enterprise 9*:

- Report filter page:
 - BrassRing implemented security for requisition-based filter fields.
 - Your organization can exchange standard requisition-based filters (**Location/Division, Department, Manager, and Recruiter**) for custom requisition-based filter fields.
- Report output:
 - Your organization can exchange the existing standard requisition-based output fields and sort/group options (**Location/Division, Department, Recruiter, and Manager**) for custom requisition-based output fields and sort/group options.
 - BrassRing has implemented security for requisition-based output fields and for sorting/grouping options
 - The Req ID column has been consolidated

Report filter page

This section describes changes to the filter page for this report.

Security for requisition-based filter fields

BrassRing applies organizational group and field-level security to the **Location/Division, Department, Recruiter, and Manager** fields or any configured custom requisition field-based filter. On the filter page, you can see only those requisition-based filter options consistent with your organizational group association and field-level user type viewing privileges. See page 75 for more information on security implementation.

Customizable requisition field filters

Your organization can exchange four of the standard requisition field-based filters, **Location/Division, Department, Manager, and Recruiter**, for custom requisition-field based filters. See page 77 for more information about this functionality.

Report output

This section describes changes to the output for this report.

Customizable requisition field output columns and sort/group options

Your organization can exchange four of the standard requisition field-based output fields and sort/group options, Location/Division, Department, **Manager**, and Recruiter for custom requisition-field based filters. See page 77 for more information about this functionality.

Security for requisition-based output fields and sort/group options

BrassRing applies organizational group and field-level security to the Location/Division, Department, Recruiter and **Manager** or any configured custom requisition field-based output field and sort/group option in the Open req activity report. In the report results, you can see only requisition-based sort/group options you have the privilege to view based on your existing Organizational group association and field-level user type viewing privileges.

If you do not have privileges to the data in the requisition-based output fields, the data in the column are replaced with an asterisk (*).

In addition, BrassRing applies My/All req security levels to the report results. The report returns Req data only for requisitions for which you have viewing privileges.

See page 75 for more information on security implementation.

Consolidated Req ID columns

The Autoreq ID and Optional req ID columns have been consolidated into a single column. The single column automatically displays the correct Req ID based on the configuration of your organization's requisition form.

If your organization uses Autoreq ID, then this report displays the 'BR' req number in the req number column; if your organization uses the Optional req ID, then the report displays the custom req numbers in the req number column.

Downtime for Reports significantly reduced

In release 9, the downtime for reports databases proceeds on a rolling basis between 12:00 AM and 3:00 AM ET. Each organization has a dedicated reports database. Each reports database is refreshed one-at-a time so that all other reports database remain available. Each organization will experience downtime only when *its* reports database is being refreshed. This change decreases the overall downtime that each organization experiences for reports.

Users now can access the Reports menu at any time of day. When the user selects a specific report, the system checks if the associated reporting database is available:

If it is available, the reporting operation proceeds.

If it is not available, the system displays the following message:

“Server unavailable - The reporting server is currently being refreshed and is temporarily unavailable. Please attempt your report request at a later time.”

Req status summary

These are the changes to the Req status summary report in *Enterprise 9*:

- Report filter page:
 - BrassRing implemented security for requisition-based filter fields.
 - Your organization can exchange standard requisition-based filters (Location/Division, Department, Manager, and Recruiter) for custom requisition-based filter fields.
 - The Req status filter is removed
 - A new “Moved to req status” filter is added
 - Report scheduling is enabled
 - BrassRing has changed the report logic to ensure that the data returned in the report are relevant to filter selections.
- Report output:
 - Your organization can exchange the existing standard requisition-based output fields and sort/group options (Location/Division, Department, Recruiter, and Manager) for custom requisition-based output fields and sort/group options.
 - BrassRing has implemented security for requisition-based output fields and for sorting/grouping options
 - The “Moved to req status” heading was added.
 - The Status column removed
 - The Req ID column was consolidated.
 - The Status date calculation was modified.
 - “Req totals” was added.

Report filter page

This section describes changes to the filter page for this report.

Security for filter fields based on requisitions

BrassRing applies organizational group and field-level security to the Location/Division, Department, Recruiter, and Manager fields or any configured custom requisition field-based

filter. On the filter page, you can see only those requisition-based filter options consistent with your organizational group association and field-level user type viewing privileges. See page 75 for more information on security implementation.

Customizable requisition field filters

Your organization can exchange four of the standard requisition field-based filters, Location/Division, Department, Manager, and Recruiter, for custom requisition-field based filters. See page 77 for more information about this functionality.

Req status filter removed

The “Req status” filter has been removed from the filter page for this report. This report allowed only a single req status or All to be selected resulting in a data set which was either too restrictive or too inclusive. This filter has been replaced with the “Moved to req status” filter.

New “Moved to req status” filter

A new required filter, “Moved to req status,” has been added to the Req status summary report. Because of this change, report results are returned based on only the specific req statuses you want to report on. You must select a minimum of one req status from this multi-select filter.

Schedule report option enabled

Reports scheduling functionality, first available in *Enterprise 8*, has been enabled for this report. You can determine the frequency and duration for executing the Req status summary report and maintain a distribution list of individuals for the results.

Report logic modifications

The Req status summary report now returns data for requisitions *moved* into the selected status(es) *only* during the selected date range. For example, if you select **month to date** and a **Req status** of **Open**, the report returns a list of requisitions moved to the open status in the month regardless of the requisition's current status. It does not list all of the Open reqs in the system.

Report output

This section describes changes to the output for this report.

Customizable requisition field output columns and sort/group options

Your organization can exchange four of the standard requisition field-based output fields and sort/group options, Location/Division, Department, Manager, and Recruiter, for custom requisition-field based filters. See page 77 for more information about this functionality.

Security for requisition-based output fields and sort/group options

BrassRing applies organizational group and field-level security to the Location/Division, Department, Recruiter and Manager or to any configured custom requisition field-based output field and sort/group option in the Req status summary report. In the report results, you can see only requisition-based sort/group options for which you have viewing privileges based on your existing organizational group association and field-level user type viewing privileges.

If you do not have privileges to the data in the requisition-based output fields, the data within the column is replaced with an asterisk (*).

In addition, My/All req security levels are applied to the report results. The report returns req data only for requisitions for which you have viewing privileges.

See page 75 for more information on security implementation.

New column heading: “Moved to req status”

A new heading, “Moved to req status” has been added to the report output. Report results are grouped by the individual req statuses selected on the filter page, regardless of how the report is re-sorted or grouped. This heading is displayed in a separate column in the results when the report is generated in Excel Sortable format.

Status column removed

The Status column which used to appear in the reports results has been removed and replaced with the ‘Moved to req status’ heading.

Consolidated Req number field

The Autoreq ID and Optional req ID columns have been consolidated into a single column. The single column automatically displays the correct Req ID based on a client setting in *Workbench*.

If your organization uses Autoreq ID, then this report displays the ‘BR’ req number in the req number column; if your organization uses the Optional req ID, then the report displays the custom req numbers in the req number column.

Status date calculation modified

The Status date column now displays the date the requisition was moved to the listed status as of the end of the date filter range. For reqs moved to the Open status, this column displays the most recent date (as of the report range end date) the req was moved to Open status (a req can be re-opened); for reqs in all other statuses, this column displays the most recent date (as of the report range end date) the req was moved to the listed status.

Req statuses grouped and totaled

The report output displays a count of the total number of requisitions for each req status grouping in the section.

Details/Limitations/Workarounds

Because of the logic change to this report, the results for the Open req activity report and the Req status summary reports may no longer match when run for the same date range.

The Open req activity report gives a picture of reqs. that were in the open status for a selected date range, while the Req status summary report returns only requisitions that were moved to the Open (or Re-open) status during the selected range.

The Req status summary does not consider a req to be moved to the Open status if the hold, canceled, or deleted statuses are undone and the req reverts to the Open status.

System user report

This section describes the changes to the System user report in *Enterprise 9*.

Report filter page:

- Implementation of security in the Organizational group and User name filters.

Report output:

- Three new fields to the report output: Candidate eLinks sent, Form eLinks sent, and Communications sent.
- The Days active column has been removed.

Report filter page

Organizational group security is applied to the Organizational group and User type filters in the System user report. You can select from only those Organizational groups to which you belong for the Organizational group filter. You can select only from users associated with the organizational groups to which you belong for the User name filter.

Report output

The System user report output includes three new columns: Candidate eLinks sent, Form eLinks sent, and Communications sent.

Column	Description
Candidate eLinks sent	This column tracks and returns a count of all candidate eLinks sent by a user for the selected date range and filter criteria. A candidate eLink is any eLink sent that contains a candidate Talent Record. This includes eLinks sent with the Talent Record and forms to complete and/or review.
Form eLinks sent	This column tracks and returns a count of all the form eLinks by a user for the selected date range and filter criteria. A form eLink is any eLink sent solely containing form information. A form sent via eLink in combination with a candidate Talent Record is counted as a candidate eLink.
Communications sent	This column tracks and returns a count of the number of e-mail and letter communications sent by a user for the selected time period and filter criteria. This count includes each individual communication sent by a user, even if multiple communications are sent to the same candidate. e-mail communications sent with a form attached are counted as a Form eLinks.
Days active	The column has been removed from the report output.

Send eLink of Talent Comparison Summary report

You can send an eLink results page (formatted as a PDF file) for the Talent comparison summary report to both system and non-system users. Report recipients see the same version of the report as the sender. The eLink expires fourteen days after the send date.

To send a copy of the Talent comparison summary report, click **eLink report** in the top navigation bar of the Talent comparison summary window. The **eLink Talent comparison summary** dialog box opens. Make selections for each field and click **OK**. *Enterprise* confirms that the report has been eLinked and sent successfully.

Recipients of the eLinked report open the e-mail to which the report is attached and click the **Download report link** to view the report. Report results expire fourteen days after the send date. If the report results have expired, *Enterprise* displays a message informing the recipient that results have expired.

Time to fill

These are the changes to the Time to fill report in *Enterprise9*:

- Report filter page:
 - BrassRing implemented security for requisition-based filter fields.
 - Your organization can exchange standard requisition-based filters (Location/Division, Department, Manager, and Recruiter) for custom requisition-based filter fields.
- Report output:
 - Your organization can exchange the existing standard requisition-based output fields and sort/group options (Location/Division, Department, Recruiter, and Manager) for custom requisition-based output fields and sort/group options.
 - BrassRing has implemented security for requisition-based output fields and for sorting/grouping options

Report filter page

This section describes changes to the filter page for this report.

Security for requisition-based filter fields

BrassRing applies organizational group and field-level security to the Location/Division, Department, Recruiter, and Manager fields or any configured custom requisition field-based filter. On the filter page, you can see only those requisition-based filter options consistent with your organizational group association and field-level user type viewing privileges. See page 75 for more information on security implementation.

Customizable requisition field filters

Your organization can exchange four of the standard requisition field-based filter options, Location/Division, Department, Manager, and Recruiter for custom requisition-field based filters. See page 77 for more information.

Report output

This section describes changes to the output for this report.

Customizable requisition field output columns and sort/group options

Your organization can exchange four of the standard requisition field-based output fields and sort/group options, Location/Division, Department, Manager, and Recruiter for custom requisition-field based filters. See page 77 for more information.

Security for requisition-based output fields and sort/group options

BrassRing applies organizational group and field-level security to the Location/Division, Department, Manager, and Recruiter or any configured custom requisition field-based output field and sort/group option in the Time to fill report. In the report results, you can see only the requisition-based sort/group options for which you have viewing privileges based on your existing organizational group association and field-level user type viewing privileges.

If you do not have privileges to the data in the requisition-based output fields, the data in the column are replaced with an asterisk (*).

In addition, BrassRing applies My/All req security levels to the report results. The report returns req data only for requisitions for which you have viewing privileges.

Close, cancel, and delete On Hold reqs

You can now close, cancel, or delete a requisition that is in a status of On Hold as long as that requisition's previous status was Open.

If the requisition's status was Pending or Approved prior to being in the On Hold status, you can cancel or delete the requisition but you cannot close it.

Req's previous status	You can take this action On Hold reqs:
Open	Close, Cancel, or Delete
Pending	Cancel or Delete
Approved	Cancel or Delete

Benefits

This feature makes it much easier for users to take actions on requisitions that are On Hold.

New functionality or replacement

This is new functionality.

Details / Limitations / Workarounds

If you have the Edit Talent Gateway user-type privilege and you select **Close**, **Cancel**, or **Delete** for a requisition whose previous status was **Open** before it was **On Hold**, you can click the **Edit Talent Gateway** button to change the information in the Talent Gateway.

Overview of implementation

This feature is available to all clients.

Cost

There is no cost for this feature.

Turn off Autofiler notification for a requisition

If your organization uses Autofiler, you can now elect to turn the notifications off for specific requisitions by checking the Turn-off Autofiler notification for this req checkbox. Checking this box does not affect the filing of candidates nor any other notifications.

Benefits

This feature makes it much easier for users to control the number of notifications they receive for a specific requisition.

New functionality or replacement

This is new functionality.

Details / Limitations / Workarounds

This feature does not apply to Overnight Search notifications for the req. This selection applies only to the Autofiler notification and does not affect any other notifications in *Enterprise*.

Overview of implementation

This feature is available to all clients who have auto filing turned on for either all candidates or internal candidates only.

Cost

There is no cost for this feature.

Edit Req icon limited by user-type privileges

The Edit icon appears in the Actions menu if the user has All Reqs-Edit privileges turned on. For those users that only have My Reqs-Edit privileges they can still edit their My Reqs from within the Req Details page.

Enterprise users must have the **All Reqs-Edit** privilege turned on in order for the Edit icon to display in the left Actions menu on all requisition output grids. Users who have only the **My Reqs-Edit** user privilege turned on can still edit their My Reqs from within the Req Details page.

Benefits

This feature provides more security for editing requisitions.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature is available to all clients.

Cost

There is no cost for this feature.

Enable spell check and text formatting for Req fields

Workbench users can enable spell check for the following:

- Standard Req fields with the field type of text box
- Standard Req fields with the field type of text area
- Custom Req fields with the field type of text box
- Custom Req fields with the field type of text area

The **Enable spell check option** is disabled on the field attributes page for the above referenced fields. When it is enabled, the Spell check link appears at the top of the Req page and applies to each field for which it is enabled.

Users can enable text formatting for the following:

- Stand Req fields with the field type of text area
- Custom Req fields with the field type of text area



The **Enable formatting** option is disabled on the field attributes page for the above reference fields. When it is enabled, the formatting toolbar appears above the text area box for that field on the Req form.

Enable spell check for Req standard text/text area fields

To enable spell check for standard text fields in requisitions:

1. Log into *Workbench*.

2. Select **Tools > Forms > Req forms**.
3. On the Req forms page, click **Define standard req fields**. The Standard fields listing page displays.
4. Scroll to text/ text area field for which you want to enable spell check.

Note

If your organization has changed the standard text field “Location/Division” to a single select field type (meaning that only one selection is permitted), the **Enable spell check** option is not available for selection.

5. Click the **Edit field attributes** icon (the pencil) in its row. The Edit standard Req fields page displays.
6. On the Edit standard Req fields page, scroll to **Enable spell check** (fields are listed alphabetically) and select the **Yes** radio button.
7. Click **Save and continue**.
8. *Workbench* processes the changes and displays a confirmation message. Click **OK** to close the page.

Enable formatting in Req standard text area fields

To enable formatting for standard text area fields in requisitions:

1. Log into *Workbench*.
2. Select **Tools > Forms > Req forms**.
3. On the Req forms page, click **Define standard req fields**. The Standard fields listing page displays.
4. On the Standard fields listing page, scroll to the text area field for which you want to enable formatting.
5. Click the **Edit field attributes** icon for that row. The Edit standard Req fields page displays.
6. Scroll to **Enable formatting** option and select Yes. The Text editor toolbar displays above the text area box for which you have enabled formatting. The Text editor tool bar includes icons for: Font, Size, Bold, Italicize, Underline, Cut, Copy, Paste, Numbered lists, Bullet lists, Decrease indent, Increase indent, Align left, Center, Align right, Font color, and Background color.
7. Click **Save and continue**.

Enable spell check in Req custom text/text area fields

To enable spell check for custom text/text area fields in requisitions:

1. Log into *Workbench*.
2. Select **Tools > Forms > Req forms**.
3. On the Req forms page, click **Define custom req fields**.
4. Scroll to the text/text area field for which you want to enable spell check.
5. Click the **Edit field attributes** icon (the pencil) for its row. The Edit field attributes page opens.
6. On the Edit field attributes page for that field, select **Yes** for the **Enable spell check** option. The spell check link displays at the top of the requisitions page and applies to all text and text area fields for which you have enabled spell check.
7. Click **Save**.
8. *Workbench* processes the changes and displays a confirmation message. Click **OK** to close the page.

Enable formatting in Req custom text/text area fields

To enable spell check for custom text/text area fields in requisitions:

1. Log into *Workbench*.
2. Select **Tools > Forms > Req forms**.
3. On the Req forms page, click **Define custom req fields**.
4. On the Custom fields listing page, scroll to the text area field for which you want to enable formatting.
5. Click the **Edit field attributes** icon for that row. The Edit standard Req fields page displays.
6. Scroll to **Enable formatting** option and select **Yes**. The Text editor toolbar displays above the text area box for which you have enabled formatting. The Text editor tool bar includes icons for: Font, Size, Bold, Italicize, Underline, Cut, Copy, Paste, Numbered lists, Bullet lists, Decrease indent, Increase indent, Align left, Center, Align right, Font color, and Background color.
7. Click **Save and continue**.

Benefits

Users can efficiently create formatted reqs with correct spelling.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature is configurable by all *Workbench* users.

Implementation decisions

Users must decide what the eLink respond instruction text should say.

Cost

There is no cost for this feature.

Set requisition fields as required by user type

Workbench administrators can set fields in both standard and custom requisitions as required for specific user types.

Benefits

This feature allows clients to customize their requisition fields and provides a means for controlling access to this privilege.

New functionality or replacement

This is new functionality.

Details / Limitations / Workarounds

When this feature is activated, requisition fields are displayed to the *Enterprise* user as required (*) or not required depending on user type.

Overview of implementation

This feature is available to all clients, but must be enabled in *Workbench*.

Cost

There is no cost for this feature.

Req Field associations

In Release 9, BrassRing offers robust configurability for completing requisition forms in *Enterprise*.

The field association functionality allows the selection of an option in a parent field to determine the options that are available in one or more subsequent child fields on a requisition form or Talent Gateway search page.

Field association also gives you the ability to build job postings based on selections made within specific associated requisition fields, providing a more efficient recruiter workflow and reducing errors.

In Talent Gateways, this feature displays a rich set of conditional list selections (derived from the requisition fields and logic implemented in *Enterprise*) to candidates on the Talent Gateway Search openings screen. Candidates can select criteria from one search field and have subsequent search fields restricted to options applicable only to the initial criteria selections.

Your BrassRing representative works with your organization to define and implement the specific requisition fields for which field associations should exist.

In *Enterprise*, this feature provides a more efficient recruiter workflow and reduces errors.

In Talent Gateways, this feature provides a rich set of conditional list selections (derived from the requisition fields and logic implemented in *Enterprise*) to candidates on the Talent Gateway Search openings screen. The candidate can select criteria from one search field and have subsequent search fields display only options applicable only to previous criteria selections.

BrassRing provides two mechanisms that can be used alone or together for importing field associations and maintaining field association data: XML field association import and Excel field association import.

For more information, please speak to your BrassRing representative and see the *BrassRing Open Integration Guide*.

Affected workflows

The field associations feature affects the following workflows:

Enterprise

- Add req (no job code default data)
- Add req (with job code default data)
- Job Code default data creation (*Enterprise* only)
- Editing existing Job Code default data (*Enterprise* only)

- “My req default” data creation
- “Save as draft” req
- “Save as new” req
- Edit req

Talent Gateways

- Initial search page launch
- Refine Search criteria/Edit agent

Best practice recommendations

The *BrassRing Open Integration Guide* provides detailed “best practice” recommendations.

Benefits

This is ideal functionality for clients who wish to have selections made in one req field control the options presented in a subsequent req field. This functionality will provide improved automation for *Enterprise* users during req creation and enable ‘smarter’ searching on Talent Gateways for candidates.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature is available to all BrassRing clients but must be implemented by BrassRing. Please see the *BrassRing Open Integration Guide* and contact your BrassRing representative for more information.

Implementation decisions

Clients make implementation decisions in consultation with a BrassRing representative.

Cost

There is an implementation cost for this feature. It is also possible to use it in conjunction with the open integration framework, which also has an implementation cost.

Resume/CV updated with latest TG profile

When a candidate updates information on the Work experience tab of the Resume/CV profile information page in Talent Gateways, it is appended to the *Enterprise* resume/CV without the skills and responsibilities data.

When this new feature is enabled, information on the Work experience tab of the Resume/CV profile information page in Talent Gateways is appended to the *Enterprise* resume/CV with every Talent Gateways submission. When skills and responsibilities values are added or updated, the candidate's resume text in *Enterprise* is appended with skills and responsibilities data. Accordingly, the candidate's resume/CV text stored in *Enterprise* is updated for each Talent Gateway submission, whether the candidate is applying for a specific job or not.

Benefits

Enterprise users see the most up-to-date version of resume/CV text pertaining to work experience for each submission. Candidates are assured that each time s/he applies to a job, work experience information from the candidate's Talent Gateway profile information is updated in *Enterprise*.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature is available to all clients but must be enabled by BrassRing.

Cost

There is no cost for this feature.

Search Enhancements

Use proximity to a Zip code to search for candidates

Using the proximity search fields, recruiters can search for candidates within a certain distance of a selected Zip code. The proximity search retrieves only candidates with U.S. Zip codes as part of their addresses.

Using the feature

To use proximity search, do the following:

1. In *Enterprise*, select **Candidates > Search**.
2. Click Edit search fields.
3. On the Edit search fields page, select **Proximity** from the Available values list box and click the left arrows to move it into the Selected values (left) list box.
4. Use the up and down arrows to change the position of **Proximity**, if desired. The fields you select are positioned in the order they appear in the Selected values (left) list box below the permanent required search fields for candidates.
5. Click **Save**.

Selecting **Proximity** as a search field causes two proximity-related search fields to appear on the Search page: **Include candidates within** and **US Zip code**.

1. Select the distance from the list for the **Include candidates within** field.
2. Select the Zip code from the list for the **of US Zip code** field.

Proximity searching is limited to U.S. zip codes. At this time, you cannot - use multiple zip codes for doing proximity searching. You cannot sort candidates by distance. The search results page does not display the proximity information you selected as search criteria.

Benefits

Recruiters have more precision in searching for candidates by location.

New functionality or replacement

This is new functionality.

Details/limitations/workarounds

This feature is available for US zip codes only.

Overview of implementation

This feature is available to all BrassRing clients.

Cost

There is no cost associated with this feature.

Search on active and inactive codes

When this feature is enabled, *Enterprise* users can search for candidates using active and inactive codes, rather than the default of active codes alone. Inactive codes are identified as such in code lists.

Benefits

Recruiters can broaden their criteria when searching for candidates.

New functionality or replacement

This is new functionality.

Details/limitations/workarounds

Enabling search for inactive codes in *Enterprise* does not affect code display in Talent Gateways, which displays only active codes by default.

Overview of implementation

This feature must be enabled by BrassRing.

Cost

There is no cost associated with this feature.

Improvements to candidate filtering

When filtering candidates, only those candidates in a folder are filtered and there is no longer a 1000-candidate limit on filtering.

Benefits

This feature enables more accurate and efficient candidate filtering.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature is available to all BrassRing clients.

Expansion of search filters

As of this release, *Enterprise*'s search capability provides several new search filters for finding current records for candidates:

Filter field	Searches for candidates
HR Status	Who are in particular HR statuses.
Folders	Who are stored in particular Folders.
Forms	Who have particular forms attached.
HR Status: Excluded	Who are not in particular HR statuses.
Folders: Excluded	Who are not stored in particular Folders.
E-mail address	By e-mail address.

The new filters are available in four places where you frequently search for candidates: the Search page in the **Candidates** menu; and in the “filter folder” pages for specific working folder(s), requisitions, and your My inbox folder. To access the Edit search fields page see the navigation instructions immediately below.

Navigation to Edit search fields page

Candidates menu	Full navigation path	Set up search filters on
Search	Candidates > Search >	Edit search fields page
Working Folders	Candidate > My Folders > Working > Working Folders > Folder name > Filter this folder >	
My open reqs	Candidate > My Folders > Working > My open reqs > View my reqs: open > Folder name > Filter this folder >	
My inbox	Candidate > My Folders > Working > Inbox > Folder name > My inbox > Filter this folder >	

User privileges and the new search fields

The HR Status and HR Status: Excluded fields are available only to users with the “view HR Status” privilege turned on.

The Folders and Folders: Excluded fields are available to all users. However, only those folders to which the user is associated as a req team member, manager, folder owner, folder team member, or My inbox owner are available for searching to that user.

The Forms and Forms: Excluded fields are available to all users. However, the form list box displays only those forms that the user has privileges to view.





Using the new filters

Enterprise 9 users set up the new filters (along with filters previously available) on the Edit search fields page. See the “Navigation to Edit search fields page” table on page to locate each place in *Enterprise9* where you can use these search filters.

Note The availability of these filters depends on your user privileges. If you do not have access to some or all of these filters but think you should see your system administrator.

Adding filters

On the Edit search fields page, do the following:

1. Select the filters for your search from the **Available values** list box.
2. Click the Add left arrows  to move the selected values to the **Selected values (left)** box or click the Add right arrows  to move the selected values to the Selected (right) box
3. In the **Selected values (left or right)** box, use the up  and down  arrows to change the order of the search filters, if desired.
4. Click **Save**.

The Search page containing your available search criteria (each filter you selected) appears. On the Search page, do the following:

1. Set each filter category to the value(s) you are searching for.
2. Click **Search** to retrieve the matching Candidate records.

Using positive and negative filters

Using positive (HR Status, Folders, Forms, and E-mail) filters, you can find candidate records with the following characteristics:

- They have one or more HR statuses.
- They are located in specific, named folders.
- They have have one or many forms attached to them.
- They contain one or more specific e-mail addresses.

You can combine some or all of these criteria. (But remember that the more criteria you include as search filters, the fewer results will be returned because the candidates in the search results have to meet all the criteria at once.)

Using negative filters (HR Status: Excluded, Folders: Excluded, and Forms: Excluded), you can identify candidates who are not in specific HR statuses, do not reside in particular folders, or do not have specified forms attached.

In some cases, you may find it useful to use the positive and negative filters together. As long as the combination is logically consistent, using positive and negative filters in the same search query is fine.

For example, you can search for candidates that have an Interview Feedback form attached but do not have the New Hire form attached using Forms and Forms: Excluded as filters in the same search query.

The table below provides examples of positive and negative search queries for the new filter fields in Enterprise 9. See the next section, “Rules for ” for more information about filter field interactions.

Positive search	Examples	Negative search	Examples
HR Status	Find candidates in HR Status “Hired.”	HR Status: Excluded	Find candidates not in the HR Status “Hired.”
Folders	Find candidates in “Working Folder: Passive Sourcing.”	Folders: Excluded	Find candidates not in “Working Folder: Passive Sourcing”
Forms	Find candidates who have the “Basic Talent Gateway” form attached.	Forms: Excluded	Find candidates who do not have the “Basic Talent Gateway” form attached.
E-mail address	Find candidates by their e-mail address: jqpublic@ e-mailaddress.com or *.gov.com.		

Rules for filter fields

The filters look for items that match the specified filter criteria currently, not historically.

HR Status and HR Status: Excluded

Use HR Status to search for candidates that are in one or more HR statuses. Use HR Status: Excluded to search for candidates that are not in one or more HR statuses.

The HR Status and HR Status: Excluded fields are independent of each other. You can search for candidates using both fields simultaneously if desired. However, in some cases matches to “excluded” filters cause matches to positive filters to be suppressed.

Interaction between HR Status and HR Status: Excluded

Condition	Results
HR Status and HR Status: Excluded are set to the same values. For example, the user sets HR Status to Hired and sets HR Status: Excluded to Hired.	Since the filter criteria for this search contradict each other, the search returns no matches.
HR Status and HR Status: Excluded are set to different values.	The search runs and handles the results as follows: returns candidates that are in HR statuses matching the selected values for HR Status excludes candidates that are in HR statuses matching the selected HR Status: Excluded statuses. If HR Status and HR Status: Excluded are set to the same value, nothing is returned, as mentioned in the previous row.

<p>Example search criteria: The user sets HR Status to candidates who are in Phone screen, First Interview, and Second Interview status; and sets HR Status: Excluded to candidates who are not in Candidate not interested, Company not interested, or Hired status.</p>	<p>Results: The search runs and returns candidates that are in the HR statuses of Phone screen, First Interview, and Second Interview statuses but are not in the HR statuses of Candidate not interested, Company not interested, or Hired status.</p>
<p>HR Status and HR Status: Excluded are set to different values.</p>	<p>If the search finds any candidate that matches criteria for both HR Status and HR Status: Excluded, that candidate is not returned because a match to the “Excluded” value always overrides matches to the positive value.</p>
<p>Example search criteria: The user sets HR Status to candidates who are in Phone screen, First Interview, and Second Interview status; and sets HR Status: Excluded to candidates who are not in Candidate not interested, Company not interested, or Hired status.</p>	<p>Results: The search runs and returns candidates that are in the HR statuses of Phone screen, First Interview, and Second Interview statuses but are not in the HR statuses of Candidate not interested, Company not interested, or Hired status, the same as the example above.</p> <p>However, the search does not return a candidate who matches at the same time any of the positive HR statuses and any of the “excluded” HR statuses. For example, the candidate matches the positive filter value “First Interview” and matches the excluded filter value “Hired” status at the same time, so that candidate is not returned in the search results.</p>

Folders and Folders: Excluded

Use the Folders filter to search for candidates that are in one or more Folders, including your “My Inbox” folder.

Use Folders: Excluded to search for candidates that are not in one or more Folders, including your My Inbox folder.

The Folders and Folders: Excluded fields are independent of each other. You can search for candidates using both fields simultaneously if desired. However, in some cases matches to “excluded” filters causes matches to positive filters to be suppressed.

Interaction between Folders and Folders: Excluded

Condition	Results
Folders and Folders: Excluded are set to the same folder(s).	Since the filter criteria for this search are contradictory, the search returns no matches.
Folders and Folders: Excluded are set to different Folders.	The search runs and returns candidates that are in the Folders selected for Folders; and returns candidates that are not in any of the Folders selected for Folders: Excluded.
Example search criteria: Find all candidates who are in Req folder 123BR but not in req folder 225BR.	Results: The search runs and returns candidates that are in Req folder 123BR but not in req folder 225BR
Folders and Folders: Excluded are set to different Folders, and a candidate is in both a positive folder and an excluded folder.	The search finds a candidate in folders as a result of the positive search. The search finds the same candidate in excluded folders as a result of the negative search. Because the candidate is found in an excluded folder, the negative results take precedence and neither the positive nor the negative results are returned.

Example search criteria: Find all candidates who are in Req folder 123BR but not in Req folder 225BR.	Results: The search runs and returns candidates that are in Req folder 123BR but not in Req folder 225BR. The search does not return candidates who are in both Req folder 123BR and Req folder 225BR.
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Forms and Forms: Excluded

Use Forms to search for candidates that currently have one or more specific forms attached to their record.

Use Forms: Excluded to search for candidates that currently do not have one or more specific forms attached to their record.

The Forms and Forms: Excluded fields are independent of each other. You can search for candidates using both fields simultaneously if desired. However, in some cases matches to “excluded” filters causes matches to positive filters to be suppressed.

Interaction between Forms and Forms: Excluded

Condition	Results
Forms and Forms: Excluded are set to the same values.	The search runs but results in no matches because matches to “Excluded” fields always override matches to the matching positive field.
Forms and Forms: Excluded are set to different values.	The search runs and returns candidates that have forms completed matching what was selected for Forms and do not have forms completed matching what was selected for Forms: Excluded.
Example search criteria: The user searches for all candidates who have a Talent Gateway form attached but do not have an EEO form attached.	Results: The search returns all candidates who have a Talent Gateway form attached but do not have an EEO form attached.
Forms and Forms: Excluded are set to different values, and one or more candidates match both the positive and excluded filter values.	The search runs and returns candidates that have forms completed matching what was selected for Forms and do not have forms completed matching what was selected for Forms: Excluded. The search does not return any candidates who match both the positive filter values and excluded filter values.
Example search criteria: The user searches for all candidates who have a Talent Gateway form attached but do not have an EEO form attached.	Results: The search returns all candidates who have a Talent Gateway form attached but do not have an EEO form attached. The search does not return candidates who have both a Talent Gateway form and EEO form attached.

Interactions of other filter fields with “excluded” fields

For search fields other than HR Status, Folders, and Forms, interacting with any of the three “excluded fields,” if a candidate matches all other search criteria but also matches the “excluded” field selections, the candidate is not returned in the search. Matching the criteria that causes exclusion results in the candidate being excluded even when s/he matches the other criteria.

For example, if a candidate matches all other search criteria and also matches one of the selected HR Status: Excluded selections, the candidate is not returned in the search.

Interaction between other fields and “Excluded” fields

Interaction of other fields with:	Description
HR Status: Excluded	For search fields other than HR Status, Folders, and Forms, interacting with the HR Status: Excluded, if a candidate matches all other search criteria, and also matches one of the selected HR Status: Excluded selections, the candidate is not returned in the search.
Folders: Excluded	For search fields other than HR Status, Folders, and Forms, interacting with the Folders: Excluded, if a candidate matches all other search criteria and also matches one of the selected Folders: Excluded selections, the candidate will not be returned in the search.
Forms: Excluded	For search fields other than HR Status, Folders, and Forms, interacting with the Forms: Excluded, if a candidate matches all other search criteria and also matches one of the selected Forms: Excluded selections, the candidate will not be returned in the search.

E-mail

You can search candidates by their e-mail address. *Enterprise* provides its Boolean search methodology for e-mail.

Benefits

The new filter settings support robust searching through HR statuses, folders, forms, and e-mails.

New functionality or replacement

This is new functionality.

Details / limitations / workarounds

Verity, the search engine used by *Enterprise*, can store only 150 folders per candidate. Due to this limitation, only the most recent 150 folders are searched when searching on folders.

Overview of implementation

This feature is available to all BrassRing clients.

Use new filter fields in saved and overnight searches

You can include the seven new fields (HR Status, HR Status: Excluded, Folders, Folders: Excluded, Forms, Forms: Excluded, and e-mail) as part of a Saved search or an Overnight search.

Benefits

Users can create and save searches that run overnight using the new filter fields.

New functionality or replacement

This is new functionality.

Details / limitations / workarounds

When a particular folder is a selected field for an Overnight search or a Saved search and that folder is deleted, the search continues to run but results in no matches for that folder.

Overview of implementation

Users must create and save overnight searches in *Enterprise*.

Automatically unsubscribe from overnight searches

Overnight searches file results only to folders that are in an Active status.

When a req folder changes its status to any status other than Open, or a working folder changes its status to any status other than Active, the next time the overnight search runs, it detects the status change, unsubscribes automatically from the search, and sends the recipient an unsubscribe e-mail notification.

If a user transfers ownership of a working folder that has an overnight search filing results to the folder, as long as the folder is active the overnight search continues to run.

Once unsubscribed, the search moves from the subscribed overnight search list to the available overnight search list.

All users are sent a notification when their search is unsubscribed, even if a specific user has selected not to be notified when candidates are filed,

The overnight search recipient receives an unsubscribed e-mail notification with the Search name and Results folder name inserted below the text message. The e-mail message says, "You have been automatically unsubscribed from your overnight search. The results folder is no longer active."

Benefits

This feature ensures that candidates are filed only to folders that are in active statuses.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature is available to all BrassRing clients.

Cost

There is no cost for this feature.

Talent Gateways – IP address range restriction

It is now possible to restrict access to Talent Gateways based upon the candidate's IP address. Organizations can specify discrete IP addresses or ranges of IP addresses. In addition, clients can customize the message displayed to candidates and direct them to a different URL.

Clients can place sensitive information on internal Talent Gateways and be assured that it will never be accessible outside the company's domain. In other cases, clients can provide a link to their Career home page by customizing the IP restriction custom text.

This feature brings internal Talent Gateways in line with existing Enterprise functionality.

Best practice recommendations

BrassRing recommends that you use any of the supported browsers (see page 4) except AOL 8.0 if you implement this feature.

Benefits

Clients can ensure that external users never access internal websites through a Talent Gateway and can redirect users to desired sites.

New functionality or replacement

This is new functionality.

Details/limitations/workarounds

The IP address restriction functionality does not work for the AOL 8.0 browser. The AOL browser does not show the Talent Gateway when it is coming from an authorized IP address. Instead, it shows an IP restriction error message. It is recommended that you use a different browser if you have enabled this feature.

Overview of implementation

This feature is configured by BrassRing.

Implementation decisions

Organizations must decide on a definition of external and internal users for each Talent Gateway and the redirection logic for each type of user.

Cost

There is a service fee for implementation of this feature.

Enterprise IP address range restriction

As of Release 9, clients can elect to use IP address restriction by ranges (in addition to using discrete IP addresses) to control access to *Enterprise*, e-mail, and freestanding requisition forms.

IP address range restriction increases website security while being easier to configure and maintain.

For example, clients can use this feature to restrict access to the company intranet to a range of IP addresses assigned to company employees, while directing external visitors to a different URL such as the main page of the corporate website.

BrassRing applies IP address restriction at the *Enterprise* level (for those who log into *Enterprise*), to Req forms created outside of *Enterprise*, and to e-mail.

If IP restriction is not enabled, then visitors from all IP addresses can access *Enterprise*, external Req forms, and e-mail.

IP address restriction does not affect system performance.

Benefits

IP address restriction increases security and makes IP address administration easier.

New functionality or replacement

This is new functionality.

Overview of implementation

IP address restriction for *Enterprise* is configured by BrassRing. If your organization has IP address restriction enabled, it is migrated automatically to the new model. *Enterprise* users may notice a change in the IP restriction message.

Cost

There is a service fee for implementation.

Single-sign-on (SSO) encryption

Clients may elect to turn on encryption for *Enterprise's* single-sign-on (SSO) capability. Encryption ensures that the sign-on process passes a TruSecure audit.

SSO supports two encryption methods: RSA, a public key encryption method new in this release, and AES (Advanced Encryption Standard), an industry-standard, block cipher encryption method which was available in past releases.

Enterprise Single-sign-on

This XML web service allows *Enterprise* to validate and authenticate users who are logged into your organization's servers. Authenticated/validated users can access *Enterprise* without supplying their *Enterprise* login credentials.

Talent Gateway Single-sign-on

This XML web service allows *Enterprise* to validate and authenticate employees who want to access an organization's internal or employee referral Talent Gateways.

Benefits

SSO can benefit the MIS staff by supporting your organization's security policy. It benefits *Enterprise* users by:

- Giving users a single point of access making it easier to use despite increased security.
- Saving time for users who have to log on regularly to multiple systems.
- Allowing data to be passed from the client's internal HRIS system (such as candidate's performance record or other internal information) to forms which are then attached to candidate submissions in *enterprise*.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature is available to all BrassRing clients and is enabled by BrassRing. The BrassRing representative may turn it on in *Workbench* and provide the valid XML format to the client for use. Also, a BrassRing representative must work with the client to make sure their system connects properly with our web services so that validation may be done.

Implementation decisions

For a straightforward SSO solution with no form data, no implementation decisions are required. For an SSO solution with form data, the client must decide what data will be pre-populated from the client internal system and what candidate forms these data will map to (the forms and/or form fields may need to be added). These forms must also be attached to the Talent Gateway and the XML must be configured accordingly.

Cost

There is a service fee for implementation followed by annual maintenance fee.

Talent Gateway Single-sign-on

This XML web service allows Talent Gateways to validate and authenticate in-house candidates who want to access an organization's internal or employee referral Talent Gateways.

Benefits

Single-sign-on encryption has the following benefits:

It encrypts passwords.

It gives users a single point of access making it easier to use despite increased security.

It saves time for users who have to log on regularly to multiple systems.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature is available to all BrassRing clients. A BrassRing representative must enable it on the Talent Gateway side, and the client is responsible for user authentication on their side.

Cost

There is an implementation fee and maintenance fee for this feature.

Configurable purchased language and locale names

Clients can elect to substitute familiar language names for their purchased language and UI locales for display in *Enterprise* instead of using the formal locale names of the software industry. This feature works similarly to the way clients can configure locale names appearing on Global Talent Gateways.

When enabled, customized language and UI locale names replace default language and locale names in all places where the default language and locale names appear.

Best practice recommendations

BrassRing recommends that you do not customize multiple purchased languages or UI locales with the same name.

Benefits

Clients can use language and locale names that are familiar to their users rather than the less familiar and sometimes confusing terms used by the software internationalization/localization industry.

New functionality or replacement

This is new functionality.

Details/limitations/workarounds

Customized language/locale names have a limit of 100 characters. Customized locale names are limited to 100 characters and can consist of extended characters (except for angle brackets < >) and Unicode.

Overview of implementation

This feature must be enabled by BrassRing.

Implementation decisions

Organizations must decide on a definition of all purchased languages and UI locales and how they should appear in each language.

Cost

There is no cost for this feature.

External Req URLs and eLinks match external user's locale

Enterprise determines more accurately which locale to use for external Req URLs, elinked requisitions, and elinked approvals sent to non-system users.

Enterprise does a series of checks on the available locales when deciding which locale to use when a non-system user clicks the external Req URL or eLink. It does not check the text of the original e-mail.

Enterprise checks if the client has purchased the locale matching that of a non-system user who clicks one of the following:

- a link to a client's external Req URL
- a link for eLink blank req
- a link for eLink req approval
- a link for eLink req to view or edit

If *Enterprise* finds a match, the information displays in the language of the matching locale. If there is no match (meaning the client has not purchased the locale of the non-system user), *Enterprise* checks if the non-system user's locale has been mapped on the back end to another purchased locale. If it has not been mapped to a client-purchased locale, the information displays in the client's base language.

Example 1

Assume the following:

- The client has purchased Spanish-Traditional.
- The client has mapped Spanish-Mexican (a non-purchased language) to Spanish – Traditional (a purchased language)
- The non-system user's browser is set to Spanish-Mexican.

Result: The non-system user's browser defaults to Spanish

Example 2

Assume the following:

- The client has purchased French-Canadian.
- The client's base locale is English.

- The non-system user's browser is set to Spanish-Mexican (a non-purchased language which has not been mapped to a purchased language).

Result: The non-system user's browser defaults to English.

Benefits

This feature selects the browser locale for the non-system user more accurately.

New functionality or replacement

This is new functionality.

Details/limitations/workarounds

Enterprise does not check the locale of the actual e-mail; it checks available locales by looking at purchased languages and locales. Matching locale checks are *not* done for Candidate or Admin eLinks and e-mails.

Overview of implementation

This feature is available to all clients but must be enabled by BrassRing.

Cost

There is no cost for this feature. There is a cost for purchasing locales.

Turkish Gateway translation

Talent Gateways are available in Turkish as of this release.

Benefits

Organizations who have Turkish speaking candidate pools can now display jobs in this language.

New functionality or replacement

This is new functionality.

Overview of implementation

Work with your BrassRing Representative to set up this new Talent Gateway language and provide translations for applicable Req and form fields.

Implementation decisions

Decide if Turkish is needed as a candidate facing language.

Cost

There is an implementation fee for this feature.

Configurable descriptive texts for address fields

In Full Talent Gateways, you can add descriptive text for **Address line 1** and **Address line 2** through *Workbench* to clarify to candidates what is required for each field.

You can add up to 150 characters in the descriptive text fields and use HTML markup for bold (bold) and italic (<i>italic</i>) text. The text displays in a font size of 7 points.

See the table below for information about the Address line descriptive text fields.

Address line descriptive text

Field	Action
Address line 1 descriptive text	Enter up to 150 characters of descriptive text to be displayed below the field. You can include HTML markup for bold and italic.
Reset to default	Click the button to reset the Address line text to the default setting: “Street address or post box number.”
Display on Gateway	Check this box to display the descriptive text under the field on the Talent Gateway. The font size is 7 points. This field is unchecked by default.
Address line 2 descriptive text	Enter up to 150 characters of descriptive text to be displayed below the field. You can include HTML markup for bold and italic.
Reset to default	Click the button to reset the Address line text to the default setting: “Suite number, apartment number or other secondary part of your address.”
Display on Gateway	Check this box to display the descriptive text under the field on the Talent Gateway. The font size is 7 points. This field is unset by default.

Customizing address description text

To customize address description text, do the following:

1. Log into Workbench.
2. Select **Tools > Text customization**.
3. On the Talent Gateway text customization page, click the **Edit** icon for the Talent Gateway you want to edit.
4. On the Customization page for the Talent Gateway, select the Profile builder tab.
5. On the Profile builder tab, enter descriptive text for one or both address fields (**Address line 1 descriptive text**, **Address line 2 descriptive text**). Click **Show me** to see how it displays for users.
6. Select the **Display on Gateway** checkbox for each address line for which you are changing the descriptive text.

Click **Reset to default** if you want to reinstate the default setting. See the table below for information about the “Address line descriptive text” fields.

7. Click **Save** to save your settings. (Click **Reset to saved** to reinstate an earlier setting if you have not already saved your current changes, or click **Cancel** to close the window without changing anything.)

Benefits

Clients can include locale-specific instructions for address fields.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature is available through *Workbench* to clients who use Full and Global Talent Gateways.

Cost

There is no cost for this feature.

Customizable Welcome pages

This feature is available for clients who use Full and Global Talent Gateways.

You can customize the design of your Talent Gateway welcome pages for when a candidate comes to the site for the first time and when they are logged in. You can customize the look of objects on the page such as the Job cart, Send to friend, and Submit resume/CV, for example. Welcome page functions are not affected by these customizations.

The welcome pages are customized by adding HTML code that is provided by your organization. The HTML file can contain header and footer content which replaces the default content on the Talent Gateway pages.

If you opt to customize any of these pages, you are responsible for ensuring that the HTML renders correctly on the welcome pages. BrassRing applies no business logic to the HTML file and uses only those tokens provided in the file. For example, if your organization has Job cart or Agent manager deactivated, and a Job cart or Agent manager link is erroneously included in the HTML file, BrassRing does not check the validity of the link before rendering the HTML code.

Best practice recommendations

Make sure that your HTML tags are well-formed and test your pages before publishing them.

Benefits

The ability to add HTML code to welcome pages enhances the branding and monitoring capability of Talent Gateway sites for clients using Full Talent Gateways.

New functionality or replacement

This is new functionality.

New Terminology

Term	Definition
HTML code	HTML is “Hypertext Markup Language.” It consists of a series of tags that instruct the browser how to display text on a web page. For example, to display bold text , use the HTML tags <code>text to be displayed bold</code> .

Overview of implementation

Workbench certified users can enter the desired content for the welcome pages. See Kenexa Recruiter BrassRing9 Release Notes - Workbench for more details. Non-Workbench users should contact their BrassRing representative.

Implementation decisions

Clients should talk to their BrassRing representative to discuss if customized HTML code on the Talent Gateway welcome pages is desirable for their organization.

Cost

There is no cost for this feature.

Customizing the landing page with HTML

You can customize the design of your Talent Gateway welcome pages, “not logged in” and “logged in.” You can customize the look of objects on the page such as the Job cart, Send to friend, and Submit resume/CV, for example. Welcome page functions are not affected by these customizations.

If you opt to customize any of these pages, you are responsible for ensuring that the HTML renders correctly on the welcome pages. Workbench applies no business logic to the HTML file and uses only those tokens provided in the file. For example, if your organization has Job cart or Search Agent Manager deactivated, and a Job cart or Search Agent Manager link is erroneously included in the HTML file, Workbench does not check the validity of the link before rendering the HTML code.

To add HTML code to the Landing page, do the following:

1. In *Workbench*, select **Tools > Talent Gateways > Text customization**.
2. On the Talent Gateway text customization page, select the Talent Gateway you want to edit and click **Edit** or click the edit icon for that row.
3. On the Customization page, select the Landing tab (if it is not already selected).
4. Scroll down to in the **Landing page html code** text box and enter up to 1000 characters marked up in HTML.
5. Click the **Preview** link to the right of the text box to see what the **Landing page html code** looks like when it is rendered.
6. Click **Reset to Saved** to go back to the last saved version without making any changes, click **Cancel** to close the page without making any changes, or click **Save** to save your changes.

Customizing the landing logged-in page with HTML

To add HTML code to the Landing logged in page, do the following:

1. In *Workbench*, select **Tools > Talent Gateways > Text customization**.

2. On the Talent Gateway text customization page, select the Talent Gateway you want to edit and click **Edit** or select the edit icon for that row.
 3. On the Customization page, select the Landing logged in tab.
 4. Scroll down to and enter up to 1000 characters in the **Landing logged in page html code** text box.
 5. Click the **Preview** link to see what the **Landing logged in page html code** looks like when it is rendered.
6. Click **Reset to Saved** to go back to the last saved version without making any changes, click **Cancel** to close the page without making any changes, or click **Save** to save your changes.

Best practice recommendations

Make sure that your HTML tags are well-formed and test your pages before publishing them.

Benefits

The ability to add HTML code to “welcome” pages enhances the branding capability of Talent Gateway sites for clients using Full Talent Gateways.

New functionality or replacement

This is new functionality.

Details/Limitations/Workarounds

If you opt to customize any of these pages, you are responsible for ensuring that the HTML renders correctly on the welcome pages. Workbench applies no business logic to the HTML file and uses only those tokens provided in the file. For example, if your organization has Job cart or Search Agent Manager deactivated, and a Job cart or Search Agent Manager link is erroneously included in the HTML file, Workbench does not check the validity of the link before rendering the HTML code.

Overview of implementation

The two HTML fields, **Landing page html code** and **Landing logged in page html code**, are blank by default. *Workbench* users enter the desired content for the two pages marked up in HTML on the appropriate tab for text customizations in *Workbench*.

Implementation decisions

Clients should talk to their BrassRing representative to determine if customized HTML code on the Talent Gateway welcome pages is desirable for their organization.

Cost

There is no cost for this feature.

Most recent education and experience

When creating Resume/CV profile information on a Talent Gateway, Candidates sometimes list their education and/or work experience in a different order than expected by the Talent Gateway. As of Release 9, candidates and recruiters must explicitly select the most recent work experience and most recent education listed when adding a resume through Talent Gateways or Enterprise. This change affects Basic, Full, and Global Talent Gateways, Gateway Questionnaires, and Agency Manager®.

Using the feature

Talent Gateways

When using Basic, Full, or Global Talent Gateways, Candidates must indicate explicitly their most recent work experience and education when applying for a job, dropping off a resume, and updating profile information. Candidates can always update or change items selected as “most recent.”

For candidates with an existing Talent Gateway profile prior to this release, the “most recent” fields are blank. Candidates are required to select “most recent” values when updating profile information, applying for a job, or adding a resume.

Agency Manager

In Agency Manager, recruiters must select the most recent work experience and education when adding information to each of these fields on the Verify candidate submission page.

Enterprise

In Enterprise, the Most recent columns are on the Edit candidate overview page and the Talent Record overview page.

Edit candidate overview page

When adding or editing candidates’ Talent Records in Enterprise through the edit candidate overview page, Recruiters must select (if not already selected) the radio button for “most recent” work experience and education. (Note, however, that the Recruiter can cancel the entry without updating the Talent Record.)

When the “most recent” selections are saved, the **Most recent** column in the Talent Record overview page is updated.

Talent Record overview page

The Talent Record overview indicates the “most recent” work experience and education with a checkmark.

For candidates added to Enterprise prior to release 9, or added through a method other than Talent Gateway and Enterprise (such as Candidate Import, Candidate Upload, TDC, and so forth), the **Most recent** column on the Talent Record is blank, meaning no work experience or education is selected as “most recent.” Recruiters can select the “most recent” work experience and education when editing the candidate’s Talent Record.

Benefits

For candidates, this change ensures that their most recent work experience and education is correctly identified. For recruiters, it provides more accurate search results in Enterprise and a better picture of the available Talent.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature is available to all BrassRing clients.

Cost

There is no cost for this feature.

Edit candidate overview page

In *Enterprise*, the Most recent columns are on the Edit candidate overview page and the Talent Record overview page.

When adding or editing candidates’ Talent Records in *Enterprise* through the edit candidate overview page, Recruiters must select (if not already selected) the radio button for “most recent” work experience and education. (Note, however, that the Recruiter can cancel the entry without updating the Talent Record.)

When the “most recent” selections are saved, the **Most recent** column in the Talent Record overview page is updated.

Talent Record overview page

The Talent Record overview indicates the “most recent” work experience and education with a checkmark.

For candidates added to *Enterprise* prior to release 9, or added through a method other than Talent Gateway and *Enterprise* (such as Candidate Import, Candidate Upload, Talent Data Center, and so forth), the **Most recent** column on the Talent Record is blank, meaning no work experience or education is selected as “most recent.” Recruiters can select the “most recent” work experience and education when editing the candidate’s Talent Record.

Hosting of web tracker code

Clients using Full and Global Talent Gateways have the ability to track visitor activity at the page level using Web tracking HTML code. Every time a candidate visits the Gateway, the web tracker code sends valuable information about the visitor back to client's log.

Best practice recommendations

Follow any guidelines for using the third-party Web tracking/stat counter code.

Benefits

This feature allows clients to count the number of hits on their website pages.

New functionality or replacement

This is new functionality.

Details/limitations/workarounds

Your organization must supply the code for the web tracker tool. It must be javascript that can be run within the <head> tag of an html page.

Overview of implementation

This feature is configurable by Workbench certified users. See the Release 9 Workbench release notes for more details. All other clients can contact your BrassRing representative for more information.

Implementation decisions

Clients must research and select the web tracking/stat counter code for placement on their web pages. Clients must decide which Gateway parent and/or child pages on which to place the web tracker code.

Cost

There is no cost for this feature.

Adding Web tracker code

Clients can use this feature by inserting the web tracking code that they receive from their web tracking vendor.

To add Web tracking HTML code, do the following:

1. In Workbench, select **Tools > Talent Gateways > Text customization**.
2. On the Talent Gateway customization page, select the Talent Gateway you want to edit and click **Edit** or click the edit icon for that row or click the Edit icon in its row.
3. On the Customization page, scroll all the way to the right and select the Web tracker tab.
4. Enter the code into the **Web tracker html code** text box.
5. Check the parent window(s) and child window(s) to which the code should be added. The relevant question is, which pages do you want to track number of site visits (“hits”) for?
6. Click **Reset to Saved** to go back to the last saved version without making any changes, click **Cancel** to close the page without making any changes, or click **Save** to save your changes.

Best practice recommendations

Follow all guidelines provided by your Web tracking vendor for using their Web tracking/stat counter code.

Benefits

This feature allows clients to count the number of visitors to their website pages.

New functionality or replacement

This is new functionality.

Details/limitations/workarounds

Your organization must supply the code for the web tracker tool. It must be javascript that can be run within the <head> tag of an html page.

Overview of implementation

This feature is configurable by *Workbench* users. Clients must provide valid Web tracking/stat counter code and select the Talent Gateway page(s) and/or child window(s) on which to place the Web tracking/stat counter code. This feature works only for javascript that can be run within the <head> tag of an HTML page. Clients can use tags within custom text to implement a type of Web tracking on a specific page, but it does not give the functional control that the Web tracker feature provides.

Implementation decisions

Clients must research and select the web tracking/stat counter code for placement on their web pages. Clients must decide which Gateway parent and/or child pages on which to place the web tracker code.

Cost

There is no cost for this feature.

Inactivity time-out for Talent Gateway sessions

During a Talent Gateway session, candidates provide sensitive and personal information during the application process, sometimes in an unsecured computing environment. The “inactivity time-out” feature detects user inactivity, pops up a warning message after a defined period of time, and automatically ends the user’s Talent Gateway session if the user fails to respond in a timely manner to the warning message. When the session times out, the page refreshes and all candidate information is removed. The sequence of events is slightly different for Basic and Full Talent Gateways.

Clients may choose the length of time permitted for user inactivity before time-out in seconds and the text for the pop-up warning message.

How this feature works

When the “inactivity time-out” feature is enabled, the Talent Gateway pops up a warning message. Users can extend their Talent Gateway session by clicking OK in response to the warning message. If a user fails to click OK, the time-out feature automatically ends the session thirty seconds after the warning message pops up. Users lose unsaved work permanently when their session times out and all information associated with their session upon entering the Gateway site is deleted.

Once the Talent Gateway session times out, users cannot use the **Refresh** icon or the browser’s **Back** button to re-enter the application. The Talent Gateway displays an error message saying that the page the user is trying to access is no longer available.

Note

If the inactivity time-out feature is enabled in Talent Gateways, the user must click OK in response to the time-out warning message to avert the time-out. When the session times out, the user’s unsaved work is lost.

Clicking OK merely extends the Talent Gateway session. The user must explicitly save entered data to his/her profile in a timely fashion to ensure that it is not lost due to a time-out.

For Basic Talent Gateways, the inactivity time-out sequence is as follows: The program detects user inactivity, pops up the warning message, ends the session (if the users does not click OK to extend the session), refreshes the page, and displays an error message indicating that the page is no longer available.

For Full Talent Gateways, the inactivity time-out sequence is as follows: The program detects user inactivity, pops up the warning message, ends the session (if the user does not click **OK** to extend the session), refreshes the page and clears all fields of information, logs out the user, and returns to the Talent Gateway landing page.

For a Global Talent Gateway, the inactivity time-out is based on the setting of the member site the user is logged into at the time. The inactivity time-out settings for other member sites are ignored.

The Talent Gateway time-out period setting extends to all Talent Gateway pop-up windows, including the Gateway Questionnaire.

Benefits

The Talent Gateway inactivity time-out feature ensures the security of candidate information when a candidate's login is idle for a specified period of time. This automatic time-out feature is especially important in a kiosk environment.

New functionality or replacement

This is new functionality.

New Terminology

Term	Definition
Inactivity time-out	The automatic termination of a Talent Gateway session when no activity is detected after a client-defined period of time, and the user does not click OK to extend the session in response to a warning message.
Warning message	The pop-up message warning Talent Gateway users of an impending time out. It gives users the opportunity to extend the session by instructing them to click OK .

Details/Limitations/Workarounds

For a Global Talent Gateway, the inactivity time-out is based on the inactivity time-out setting of the member site the user is working on at a given time.

When two Talent Gateways windows from the same session are opened, the session will time-out for both Talent Gateways windows based on the inactivity period of the window with the least time-out period.

Overview of implementation

Time-out is an optional feature that can be activated by Workbench certified users. Clients can turn this feature on or off for each Talent Gateway site. See the BrassRing 9 Release Notes – Workbench for more information. Non *Workbench* users can contact their BrassRing Representative for more information.

Implementation decisions

Clients must decide how quickly the program should detect user inactivity (the range is from 60 to 900 seconds, or one to fifteen minutes) and if the pop up the warning message default text should be used.

Cost

There is no cost for this feature.

Configurable inactivity time-out

Workbench-certified users can activate the inactivity time-out feature for Full and Global Talent Gateways in *Workbench*. If the system detects candidate inactivity of the specified duration, a time-out warning message displays 30 seconds prior to the number of seconds configured for the time-out period.

Certified users can customize the length of time that elapses between the start of the detected inactivity and the display of the time-out warning message to the candidate if desired. See the next section for more information.

For a Full Talent Gateway, the system ends a candidate's session and logs him/her out after the customized period of Talent Gateway inactivity.

For a Global Talent Gateway, calculating inactivity is based on the setting of the member site the candidate is using at a given time. The system ignores the inactivity time-out settings for the other member sites.

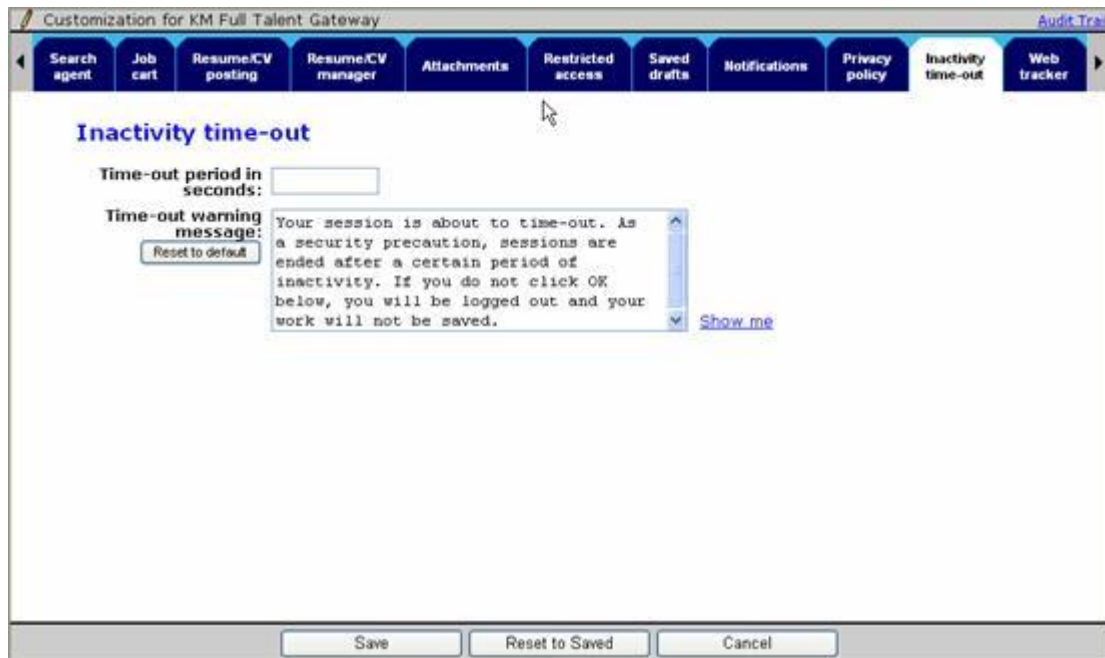
When the Talent Gateway times out due to inactivity, the page is refreshed and all entered data is removed.

When an inactivity time-out occurs on a Full Talent Gateway, the candidate is automatically re-directed to the "landing page not logged in." The user cannot use the browser's **Back** button to re-enter the site.

Configuring the duration and warning message

To configure the length of time allowed for user inactivity, do the following:

1. In *Workbench*, select **Tools > Talent Gateways > Text customization**.
2. On the Talent Gateway text customization page, select the Talent Gateway for which you want to configure the inactivity time-out feature and click the **Edit** icon (the pencil). You must select a Full or Global Talent Gateway.
3. On the Customization page, scroll to the Inactivity time out tab and select it.



4. In the **Time-out period in seconds** field, enter a positive, whole number (between 60 and 900). This is the amount of time that should elapse from the beginning of user inactivity to when the time-out is executed. The warning message always pops up thirty seconds before the user is logged out. See “Warning message timing” below for more information.

Warning message timing

Time-out period (seconds)	Minutes	Time elapsed when warning message pops up
60	1	30 seconds
300	5	4 min., 30 sec.
600	10	9 min., 30 sec.
900	15	14 min., 30 sec.

5. In the **Time-out warning message** text box, enter a customized warning message in the if desired. You must ensure that you have a warning message in this box (either a customized one or the default warning message) or else the Gateway will time out without warning users.

You can click **Restore to default** to go back to the default warning message. The default warning message says:

“Your session is about to time-out. As a security precaution, sessions are ended after a certain period of inactivity. If you do not click **OK** below, you will be logged out and your work will not be saved.”

6. Do one of the following:
 - Click **Reset to Saved** if you want to go back to your previously saved settings. This works only if you have not yet saved your changes in this session.

- Click **Cancel** to close the Inactivity time-out tab without saving any changes.
- Click **Save** to save your new settings.

Insta-filing for Talent Gateways and Agency Manager

Clients can turn on insta-filing for Basic and Full Talent Gateways and Agency Manager. When insta-filing is enabled, candidate applications submitted through a Talent Gateway or Agency Manager site are filed instantly to the appropriate requisition instead of later during overnight autofiling.

To take advantage of this new functionality, your organization must have auto-filing turned on for either all or internal candidates.

For Global Talent Gateways, this feature can be turned on at the individual Talent Gateway level for member Talent Gateways.

For Global Agency Managers, this feature can be turned on at the individual Agency Manager level for member Agency Managers.

In all cases, a single e-mail notification per receiver with a summary of the candidates filed to the recipient's req through insta-file is sent the following day, the same as for candidate import insta-filing.

“Insta-filing” already exists for candidates added through Candidate Import.

Benefits

This feature speeds up filing of candidate applications submitted through Talent Gateways to requisitions. Recruiters see candidate applications almost immediately and do not have to wait for overnight autofiling.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature is available to all clients but must be enabled by BrassRing.

Cost

There is no cost for this feature.

Linking directly to Search results pages

Your organization can create direct links to specific searches on Full Talent Gateways and add them for each group of jobs to your web pages (for example, View Product Manager positions; View jobs in Arizona).

Upon clicking on a job group link, candidates are automatically directed to the search results page of the specific job group.

Using the feature

To create a working link to the search results, the partner ID and site ID parameters (found in your existing Talent Gateway link) must be added to the search results URL. For example:

1. Select search criteria for jobs.
2. Run the search.
3. Save the results as a Search agent.
4. Login to the Talent gateway and go to the Search agent manager and run the search
5. Add the partner ID and site ID parameters to the resulting URL (the contents of the **Address** bar in the browser).
6. The resulting URL will be your direct link to that search criteria and can be placed on your web pages.

For example, if the Search results URL is:

http://jobs.brassring.com/1033/ASP/TG/cim_searchresults.asp?ref=413200615633&AgentID=18443&Function=runquery&

Caution Select and copy the URL from your browser address bar to reduce the possibility of typographical errors.

Do the following:

1. Add the partner ID and site ID to the end of the URL for the query as follows:

An example of partner ID and site ID

The partner ID is `partnerid=516`

The site ID is `siteid=56`

2. Add the following string to the Search results URL:

`partnerid=516&siteid=56`

The results are:

http://jobs.brassring.com/1033/ASP/TG/cim_searchresults.asp?ref=413200615633&AgentID=18443&Function=runquery&partnerid=516&siteid=56

Caution	Make sure that you include the ampersand (&) between the partner ID and the site ID at the end of the URL (for example: partnerid=516&siteid=56).
----------------	---

Benefits

This feature allows you to present job search results for specific groups of jobs to candidates on your web pages.

New functionality or replacement

This is new functionality.

New Terminology

Term	Definition
Search results URL	The contents of the browser's address bar for the Search results page.
partnerid	The partner ID is part of your Talent Gateway site URL. It is contained in the "http" address (also called the URL) when you launch the Talent Gateway site. The format for the partner ID is partnerid=<number>; for example, partnerid=516. Do not include the angle brackets as part of the partnerid number.
siteid	The site ID is part of your Talent Gateway site URL. It is contained in the "http" address (also called an URL) after the string of characters contained within the quotation marks: "partnerid=<number>&". The format for the site ID is siteid=<number>; for example, siteid=56. Do not include the angle brackets as part of the siteid number.

Details/Limitations/Workarounds

Codes (for example, Source codes) included in the URL are not retained.

Cost

There is no cost for this feature.

Localization for Basic Talent Gateways

For Basic Gateways, you can now specify date, name, and address formats that are appropriate for your locale, if desired.

Benefits

Clients can offer localized UIs and a better user experience to their non-US Talent Gateway users. In particular, clients can provide locale-specific instructions for address fields.

New functionality or replacement

This is new functionality.

Overview of implementation

Workbench certified clients can configure their localization settings for date, name, and address formats following the instructions in the BrassRing 9 Release Notes – Workbench. Other clients can contact their BrassRing representative for configuration details.

Implementation decisions

Clients must decide if their users would benefit from having alternative formatting available for dates, names, and addresses.

Cost

There is no cost for this feature.

Localizing

The Talent Gateway localization settings page in *Workbench* is available for Basic Talent Gateways in this release. It contains fields for date, name, and address formats.

To customize localization settings for Basic Talent Gateways, do the following:

1. Log into Workbench.
2. Select **Tools > Talent Gateways > Localization settings**.
3. On the Talent Gateway localization settings page find the Basic Talent Gateway for which you are changing the localization settings and click **Edit**.
4. On the Localization settings for <Talent Gateway> page do the following:

- Select the **Date format**.
- Select the **Name settings** format.
- Select the **Address settings** format.

5. Do one of the following:

- Click **Cancel** to close the window without saving anything.
- Click **Revert to saved** to reinstate a previously saved version (if you have not yet saved your changes in this session).
- Click **Save** to save the changes you just made.

The Basic Talent Gateway uses the same settings as Full Talent Gateways for date, name, and address.

Benefits

Clients can offer localized UIs and a better user experience to their non-US Talent Gateway users. In particular, clients can provide locale-specific instructions for address fields.

New functionality or replacement

This is new functionality.

Overview of implementation

Basic Talent Gateway clients must configure their localization settings for date, name, and address formats following the instructions in the BrassRing 9 Release Notes – *Workbench* or in the *Workbench Manual*.

Implementation decisions

Clients must decide if their users would benefit from having alternative formatting available for dates, names, and addresses.

Cost

There is no cost for this feature.

Field associations

In Release 9, BrassRing offers robust configurability for completing requisition forms in Enterprise. When implemented, the field association functionality allows the selection of an option in one field to restrict or automatically select the options available in subsequent fields on the requisition. This feature constrains and automates the process of creating job requisitions based on user selections for requisition fields. If configured on the requisition, this functionality will also be used on the Search pages within Talent Gateways.

Your BrassRing representative works with your organization to define and implement the specific requisition fields in which field associations should exist. See BrassRing 9 Enterprise Release Notes for more information on the Requisition portion of this feature.

In Talent Gateways, this feature provides a rich set of conditional list selections (derived from the requisition fields and logic implemented in Enterprise) to candidates on the Talent Gateway Search openings screen. The candidate can select criteria from one search field and have subsequent search fields display only options applicable only to previous criteria selections.

Affected workflows

Talent Gateways

Initial search page launch

Refine Search criteria/Edit agent

Best practice recommendations

The BrassRing Open Integration Guide provides detailed “best practice” recommendations.

Benefits

This functionality will provide improved automation for *Enterprise* users during req creation and enable ‘smarter’ searching on Talent Gateways for candidates.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature is available to all BrassRing clients but must be implemented by BrassRing. Please see the BrassRing Open Integration Guide for more information.

Implementation decisions

Clients make implementation decisions in consultation with a BrassRing representative.

Cost

There is an implementation cost for this feature. It is also possible to use it in conjunction with “open integration,” which also has an implementation

“Send to friend” replies go to specified Talent Gateway

Clients who are part of multi-divisional and multi-national companies that use several Talent Gateways can select one Talent Gateway as the default gateway for the “Send to friend” feature for each active Talent Gateway site. If default Talent Gateways are set up in this type of environment, the “Send to friend” feature works with more accuracy. When the recipient clicks the link in the “Send to friend” e-mail, the request for the web page associated with the link goes to the designated default Talent Gateway.

How it works

Clients can choose which of their Talent Gateway sites should be designated as the default site.

- If “Send to a Friend” is used from a Talent Gateway with a default Talent Gateway, the recipient accesses that job on the designated default Talent Gateway when s/he clicks the link.
- If “Send to a Friend” is used from a Talent Gateway with no default Talent Gateway selected, the recipient accesses the job on the Talent Gateway from which the link was sent.
- If “Send to a Friend” is used from a Talent Gateway in a setting where multiple Talent Gateways are used, and defaults are selected for each Talent Gateway, the recipient accesses the job on the designated default gateway for the originating Talent Gateway.

Benefits

“Send-to-friend” replies are directed with more accuracy to a Talent Gateway.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature must be configured by BrassRing. Contact your BrassRing representative for more information.

Implementation decisions

Clients who use multiple Talent Gateways must decide how “Send-to-friend” replies should best be routed.

Cost

There is no cost for this feature.

Gateway tabs usability enhancement

BrassRing Release 9 introduces an improved workflow for the apply / resume drop-off process in Talent Gateways. The navigation path ensures that candidates visit all tabs before moving on to the final page.

When applying for a job through a Talent Gateway, Candidates are led through the following sequence on the Resume/CV profile information page when completing the “apply” / resume drop-off process:

- Contact information tab
- Work experience tab
- Education tab

The tabs are flexible and users can toggle back and forth as well.

When users follow the navigation sequence, they must enter all required information on each page before clicking Next tab. Clicking **Next tab** temporarily saves the data entered.

Users can click **Previous tab** to go back to a tab if necessary.

Users must click **Submit** at the end of the workflow to save everything they have entered.

Users can click **Cancel** to end the Resume/CV profile session without saving any of the data entered.

Contact information tab

The Contact information tab contains the following fields: First name*, Middle name, Last name*, Address line 1, Address line 2, Country, City, State/Region/Province, Zip/Postal code, Home phone*, Work phone, Other phone (for example, mobile), Contact e-mail address, Fax, and Web address. The asterisk (*) indicates that a field is required.

Work experience tab

Completing the Work experience tab is optional. The Work experience tab contains the following fields: Position or job title, Organization name, Responsibilities, Skills, Start year, End year, Most recent, and Actions.

Users can add one or more instances of work experience. Users must select “Most recent” for an instance of work experience even if only one instance is entered.

Education tab

Completing the Education tab is optional. The Education tab contains the following fields: School or Educational institution, Major or Area of study, Degree, GPA, Grad year, Most recent, and Actions.

Users can add one or more instances of education. Users must select “Most recent” for an instance of work education even if only one instance is entered.

After completing all appropriate sections, users must click Submit to save the new or updated Profile/CV.

Benefits

The navigation path through the work experience and education tabs on the profile/CV page increases the chances that the candidate will submit sufficient data to create a valid profile.

New functionality or replacement

This is replacement functionality.

Overview of implementation

This feature is available to all BrassRing clients.

Cost

There is no cost for this feature.

Talent Record Enhancements

Configurable header for printing from Talent Record

Organizations can choose to configure a page header that is specific to printing from within the Talent Record. The page header can contain a maximum of 500 characters, including HTML tags, and can be left-, center-, or right-aligned.

The Page header field is translatable into all client purchased *Enterprise* UI locales.

Benefits

This feature allows clients to add text such as Confidential to pages printed from within the Talent Record.

New functionality or replacement

This is new functionality.

Cost

There is no cost for this feature.

Configuration

You can choose to configure a page header that is specific to printing the resume from within the Talent Record. The page header can contain a maximum of 500 characters, including HTML tags, and can be left-, center-, or right-aligned.

The Page header field can be translated into all client-purchased *Enterprise* locales.

To customize the header to display on the printed Talent Record, do the following:

1. Select **Tools > Settings > Printing page header**. The Printing page header page displays.
2. Select the alignment for the header: Left aligned, Center aligned (default), or Right aligned
3. Enter the page header text and HTML into the **Page header** text box.
4. Click **Preview** to see what it will look like.
5. Click **Save** to save your changes. (Click **Cancel** to close the page without making changes. Click **Revert to saved** to go back to a prior saved version if you have not yet saved your changes.)

Best practice recommendations

Use standard HTML tags and preview the header before publishing it.

Overview of implementation

This feature is configurable by all *Workbench* users.

Implementation decisions

Clients must decide if they want customized text on their Talent Record pages and what it should say.

Print preview page

Clicking the **Print** button from within the Talent Record automatically launches the Print preview page. On the Print preview page, you can select one or more Talent Record sections to print in addition to the already-selected print page default by clicking the corresponding check box. You can refresh the preview to review any additional sections that you select. When you click **Print**, all selected sections are sent to the standard Microsoft Print page, whether you refreshed the preview or not.

You can print from any Talent Record tab, including the following: Overview, Resume/CV, Forms, Notes, HR Status, eLink, Communications, Interview Schedule, Attachments, and Agency.

The HR Status and Agency sections display and print both current and history as separate grids.

If your organization has configured the printing page header, the header is inserted above each section being printed. Headers are printed at the beginning of each section of the Talent Record included in the print job. See page 49 for more information about the configurable header for printing from within the Talent Record.

Each Talent Record tab has its own print button

The Talent Record has a **Print** button on each tab located in the horizontal bar below the section tabs. When you click **Print**, the module displays a preview page with the current section selected. *Enterprise* prints the page for the current candidate only, even if you selected multiple candidates.

Benefits

This feature makes it possible to easily print all Talent Record sections.

New functionality or replacement

This is new functionality.

Overview of implementation

This feature is available to all clients.

Cost

There is no cost for this feature.

Workbench – Release 9 Notes

Product name and logo changes

Enterprise 9 has been renamed to Kenexa Recruiter BrassRing™ 9. Your version of Kenexa Recruiter BrassRing 9 reflects these changes.

Workbench has been renamed to Kenexa Recruiter BrassRing™ 9 – Workbench. Your version of Workbench reflects these changes.

The product name and branding changes are not included in the documentation accompanying the release of December 4, 2006.

Access to *Workbench* features

Workbench 9 features are available for all Workbench certification levels.

Release overview

The following table summarizes BrassRing’s Release 9 product features for *Workbench*.

Feature	Description	Page
Product name and logo changes	<p><i>Enterprise 9</i> has been renamed to Kenexa Recruiter BrassRing™ 9. Your version of Kenexa Recruiter BrassRing 9 reflects these changes.</p> <p><i>Workbench</i> has been renamed to Kenexa Recruiter BrassRing™ 9 – Workbench. Your version of Workbench reflects these changes.</p> <p>The product name and branding changes are not included in the documentation accompanying the release of December 4, 2006.</p>	3
Access to Workbench	Workbench 9 features are available for all Workbench certification levels.	3
Workbench changes affecting <i>Enterprise</i>		
Spell check and formatting for Req fields	You can enable spell check for standard and custom text and text area fields in requisitions. Enable text formatting for standard and custom text area fields in requisitions.	7
Configurable header on Talent Record pages.	You can create a header for printed Talent Record pages.	10
Configurable eLink “Respond to” text	You can replace eLink “Respond to” text with more detailed instructions if desired.	9
		14

Talent Gateways		
Customizable HTML on welcome pages	You can customize your landing and landing logged-in pages.	14
Web tracker code on website pages	You can add Web tracker/stat counter code on your Talent Gateway pages.	16
Descriptive text for address fields	You can configure descriptive texts for address fields.	17
Inactivity time-out	You can configure duration and warning message text for inactivity time-out feature.	19
Localization settings in Basic Talent Gateways	You can localization of date, name, and address fields for Basic Talent Gateways.	21

Enterprise features

Enable spell check and text formatting for Req fields

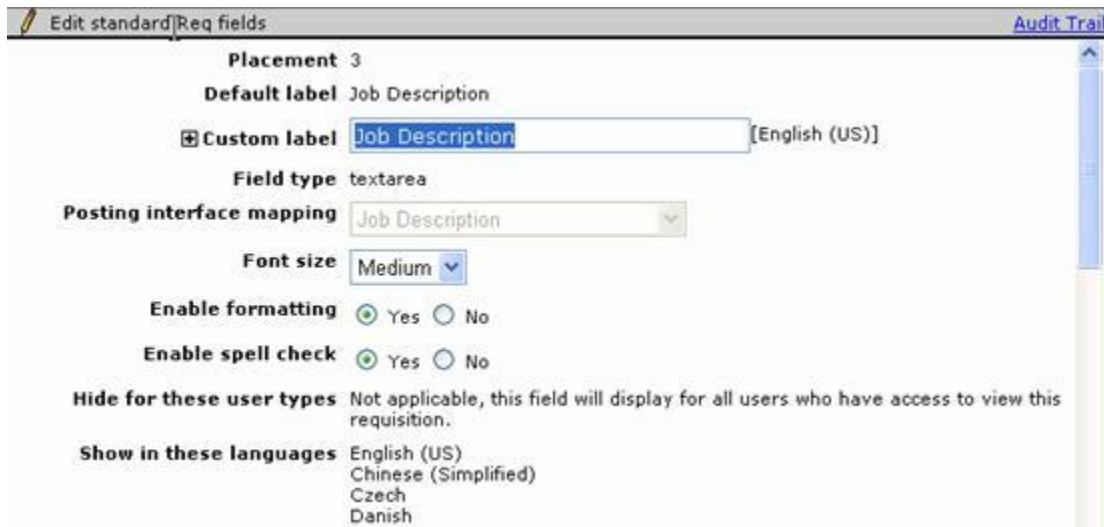
Workbench users can enable spell check for the following:

- Standard Req fields with the field type of text box
- Standard Req fields with the field type of text area
- Custom Req fields with the field type of text box
- Custom Req fields with the field type of text area

The Enable spell check option is disabled on the field attributes page for the above referenced fields. When it is enabled, the Spell check link appears at the top of the Req page and applies to each field for which it is enabled.

Users can enable text formatting for the following:

- Stand Req fields with the field type of text area
- Custom Req fields with the field type of text area



The Enable formatting option is disabled on the field attributes page for the above reference fields. When it is enabled, the formatting toolbar appears above the text area box for that field on the Req form.

Enable spell check for Req standard text/text area fields

To enable spell check for standard text fields in requisitions:

1. Log into *Workbench*.
2. Select Tools > Forms > Req forms.
3. On the Req forms page, click Define standard req fields. The Standard fields listing page displays.
4. Scroll to text/ text area field for which you want to enable spell check.

Note If your organization has changed the standard text field “Location/Division” to a single select field type (meaning that only one selection is permitted), the Enable spell check option is not available for selection.

5. Click the Edit field attributes icon (the pencil) in its row. The Edit standard Req fields page displays.
6. On the Edit standard Req fields page, scroll to Enable spell check (fields are listed alphabetically) and select the Yes radio button.
7. Click Save and continue.

8. *Workbench* processes the changes and displays a confirmation message. Click OK to close the page.

Enable formatting in Req standard text area fields

To enable formatting for standard text area fields in requisitions:

1. Log into *Workbench*.
2. Select Tools > Forms > Req forms.
3. On the Req forms page, click Define standard req fields. The Standard fields listing page displays.
4. On the Standard fields listing page, scroll to the text area field for which you want to enable formatting.
5. Click the Edit field attributes icon for that row. The Edit standard Req fields page displays.
6. Scroll to Enable formatting option and select Yes. The Text editor toolbar displays above the text area box for which you have enabled formatting. The Text editor tool bar includes icons for: Font, Size, Bold, Italicize, Underline, Cut, Copy, Paste, Numbered lists, Bullet lists, Decrease indent, Increase indent, Align left, Center, Align right, Font color, and Background color.
7. Click Save and continue.

Enable spell check in Req custom text/text area fields

To enable spell check for custom text/text area fields in requisitions:

1. Log into *Workbench*.
2. Select Tools > Forms > Req forms.
3. On the Req forms page, click Define custom req fields.
4. Scroll to the text/text area field for which you want to enable spell check.
5. Click the Edit field attributes icon (the pencil) for its row. The Edit field attributes page opens.
6. On the Edit field attributes page for that field, select Yes for the Enable spell check option. The spell check link displays at the top of the requisitions page and applies to all text and text area fields for which you have enabled spell check.
7. Click Save.

8. *Workbench* processes the changes and displays a confirmation message. Click OK to close the page.

Enable formatting in Req custom text/text area fields

To enable spell check for custom text/text area fields in requisitions:

1. Log into *Workbench*.
2. Select Tools > Forms > Req forms.
3. On the Req forms page, click Define custom req fields.
4. On the Custom fields listing page, scroll to the text area field for which you want to enable formatting.
5. Click the Edit field attributes icon for that row. The Edit standard Req fields page displays.
6. Scroll to Enable formatting option and select Yes. The Text editor toolbar displays above the text area box for which you have enabled formatting. The Text editor tool bar includes icons for: Font, Size, Bold, Italicize, Underline, Cut, Copy, Paste, Numbered lists, Bullet lists, Decrease indent, Increase indent, Align left, Center, Align right, Font color, and Background color.
7. Click Save and continue.

Configurable header for printed Talent Record pages

You can choose to configure a page header that is specific to printing the resume from within the Talent Record. The page header can contain a maximum of 500 characters, including HTML tags, and can be left-, center-, or right-aligned.

The Page header field can be translated into all client-purchased *Enterpriselocales*.

To customize the header to display on the printed Talent Record, do the following:

1. Select Tools > Settings > Printing page header. The Printing page header page displays.
2. Select the alignment for the header: Left aligned, Center aligned (default), or Right aligned
3. Enter the page header text and HTML into the Page header text box.
4. Click Preview to see what it will look like.
5. Click Save to save your changes. (Click Cancel to close the page without making changes. Click Revert to saved to go back to a prior saved version if you have not yet saved your changes.)

Best practice recommendations

Use standard HTML tags and preview the header before publishing it.

Benefits

You can add statements relating to privacy and so forth to every page of the Talent Record.

Implementation decisions

Clients must decide if they want customized text on their Talent Record pages and what it should say.

Configurable eLink Respond to text

You can change the instructional text that appears to the left of the eLink Respond button.

To customize the “respond to” instructions for eLinks, do the following:

1. Log into *Workbench*.
2. Select Tools > Settings > Instructions > eLink respond instructions.
3. On the eLink respond instructions page, enter your customized text in the Respond Instructions text box. The default text is “Click to send your feedback on this candidate:”
4. Click Preview to see how the customized text will look to users.
5. Click Save to save your changes. (Click Cancel to close the window without making changes. Click Revert to saved to go back to a prior saved version if you have not yet saved your changes.)

If you have changed the eLink Respond instruction text and saved it, you can click Set to default to restore the default text for the button.



Benefits

You can clarify instructions for responding to eLinked materials.

Implementation decisions

Users must decide what the eLink respond button text should say.

Talent Gateways features

Customizable welcome pages

This feature is available to clients who use Full and Global Talent Gateways and is configured in *Workbench*.

You can customize the design of your Talent Gateway welcome pages, “not logged in” and “logged in.” You can customize the look of objects on the page such as the Job cart, Send to friend, and Submit resume/CV, for example. Welcome page functions are not affected by these customizations.

If you opt to customize any of these pages, you are responsible for ensuring that the HTML renders correctly on the welcome pages. Workbench applies no business logic to the HTML file and uses only those tokens provided in the file. For example, if your organization has Job cart or Search Agent Manager deactivated, and a Job cart or Search Agent Manager link is erroneously included in the HTML file, Workbench does not check the validity of the link before rendering the HTML code.

Customizing the landing page with HTML

To add HTML code to the Landing page, do the following:

1. In *Workbench*, select Tools > Talent Gateways > Text customization.
2. On the Talent Gateway text customization page, select the Talent Gateway you want to edit and click Edit or click the edit icon for that row.
3. On the Customization page, select the Landing tab (if it is not already selected).
4. Scroll down to in the Landing page html code text box and enter up to 1000 characters marked up in HTML.
5. Click the Preview link to the right of the text box to see what the Landing page html code looks like when it is rendered.
6. Click Reset to Saved to go back to the last saved version without making any changes, click Cancel to close the page without making any changes, or click Save to save your changes.

Customizing the landing logged-in page with HTML

To add HTML code to the Landing logged in page, do the following:

1. In *Workbench*, select Tools > Talent Gateways > Text customization.
2. On the Talent Gateway text customization page, select the Talent Gateway you want to edit and click Edit or select the edit icon for that row.
3. On the Customization page, select the Landing logged in tab.
4. Scroll down to and enter up to 1000 characters in the Landing logged in page html code text box.
5. Click the Preview link to see what the Landing logged in page html code looks like when it is rendered.
6. Click Reset to Saved to go back to the last saved version without making any changes, click Cancel to close the page without making any changes, or click Save to save your changes.

Best practice recommendations

Make sure that your HTML tags are well-formed and test your pages before publishing them.

Benefits

The ability to add HTML code to “welcome” pages enhances the branding capability of Talent Gateway sites for clients using Full Talent Gateways.

Details/Limitations/Workarounds

If you opt to customize any of these pages, you are responsible for ensuring that the HTML renders correctly on the welcome pages. Workbench applies no business logic to the HTML file and uses only those tokens provided in the file. For example, if your organization has Job cart or Search Agent Manager deactivated, and a Job cart or Search Agent Manager link is erroneously included in the HTML file, Workbench does not check the validity of the link before rendering the HTML code.

Overview of implementation

The two HTML fields, Landing page html code and Landing logged in page html code, are blank by default. *Workbench* users enter the desired content for the two pages marked up in HTML on the appropriate tab for text customizations in *Workbench*.

Implementation decisions

Clients should talk to their BrassRing representative to determine if customized HTML code on the Talent Gateway welcome pages is desirable for their organization.

Host Web tracker code

Clients using Full and Global Talent Gateways have the ability to track visitor activity at the page level using Web tracking HTML code. Every time a candidate visits the Gateway, the web tracker code sends valuable information about the visitor back to client’s log. Clients can use this feature by inserting the web tracking code that they receive from their web tracking vendor.

Adding Web tracker code

To add Web tracking HTML code, do the following:

1. In Workbench, select Tools > Talent Gateways > Text customization.
2. On the Talent Gateway customization page, select the Talent Gateway you want to edit and click Edit or click the edit icon for that row or click the Edit icon in its row.
3. On the Customization page, scroll all the way to the right and select the Web tracker tab.
4. Enter the code into the Web tracker html code text box.
5. Check the parent window(s) and child window(s) to which the code should be added. The relevant question is, which pages do you want to track number of site visits (“hits”) for?

6. Click Reset to Saved to go back to the last saved version without making any changes, click Cancel to close the page without making any changes, or click Save to save your changes.

Best practice recommendations

Follow all guidelines provided by your Web tracking vendor for using their Web tracking/stat counter code.

Benefits

This feature allows clients to count the number of visitors to their website pages.

Details/limitations/workarounds

Your organization must supply the code for the web tracker tool. It must be javascript that can be run within the <head> tag of an html page.

Overview of implementation

This feature is configurable by *Workbench* users. Clients must provide valid Web tracking/stat counter code and select the Talent Gateway page(s) and/or child window(s) on which to place the Web tracking/stat counter code. This feature works only for javascript that can be run within the <head> tag of an HTML page. Clients can use tags within custom text to implement a type of Web tracking on a specific page, but it does not give the functional control that the Web tracker feature provides.

Implementation decisions

Clients must research and select the web tracking/stat counter code for placement on their web pages. Clients must decide which Gateway parent and/or child pages on which to place the web tracker code.

Configurable descriptive texts for address fields

In Full Talent Gateways, you can add descriptive text for Address line 1 and Address line 2 through *Workbench* to clarify to candidates what is required for each field.

You can add up to 150 characters in the descriptive text fields and use HTML markup for bold (bold) and italic (<i>italic</i>) text. The text displays in a font size of 7 points.

See the table below for information about the Address line descriptive text fields.

Address line descriptive text

Field	Action
Address line 1 descriptive text	Enter up to 150 characters of descriptive text to be displayed below the field. You can include HTML markup for bold and italic.

Reset to default	Click the button to reset the Address line text to the default setting: “Street address or post box number.”
Display on Gateway	Check this box to display the descriptive text under the field on the Talent Gateway. The font size is 7 points. This field is unchecked by default.
Address line 2 descriptive text	Enter up to 150 characters of descriptive text to be displayed below the field. You can include HTML markup for bold and italic.
Reset to default	Click the button to reset the Address line text to the default setting: “Suite number, apartment number or other secondary part of your address.”
Display on Gateway	Check this box to display the descriptive text under the field on the Talent Gateway. The font size is 7 points. This field is unset by default.

Customizing address description text

To customize address description text, do the following:

1. Log into Workbench.
2. Select Tools > Text customization.
3. On the Talent Gateway text customization page, click the Edit icon for the Talent Gateway you want to edit.
4. On the Customization page for the Talent Gateway, select the Profile builder tab.
5. On the Profile builder tab, enter descriptive text for one or both address fields (Address line 1 descriptive text, Address line 2 descriptive text). Click Show me to see how it displays for users.
6. Select the Display on Gateway checkbox for each address line for which you are changing the descriptive text.

Click Reset to default if you want to reinstate the default setting. See the table below for information about the “Address line descriptive text” fields.

7. Click Save to save your settings. (Click Reset to saved to reinstate an earlier setting if you have not already saved your current changes, or click Cancel to close the window without changing anything.)

Benefits

Clients can include locale-specific instructions for address fields.

Overview of implementation

This feature is available through *Workbench* to clients who use Full and Global Talent Gateways.

Configurable inactivity time-out

Workbench-certified users can activate the inactivity time-out feature for Full and Global Talent Gateways in *Workbench*. If the system detects candidate inactivity of the specified duration, a time-out warning message displays 30 seconds prior to the number of seconds configured for the time-out period.

Certified users can customize the length of time that elapses between the start of the detected inactivity and the display of the time-out warning message to the candidate if desired. See the next section for more information.

For a Full Talent Gateway, the system ends a candidate's session and logs him/her out after the customized period of Talent Gateway inactivity.

For a Global Talent Gateway, calculating inactivity is based on the setting of the member site the candidate is using at a given time. The system ignores the inactivity time-out settings for the other member sites.

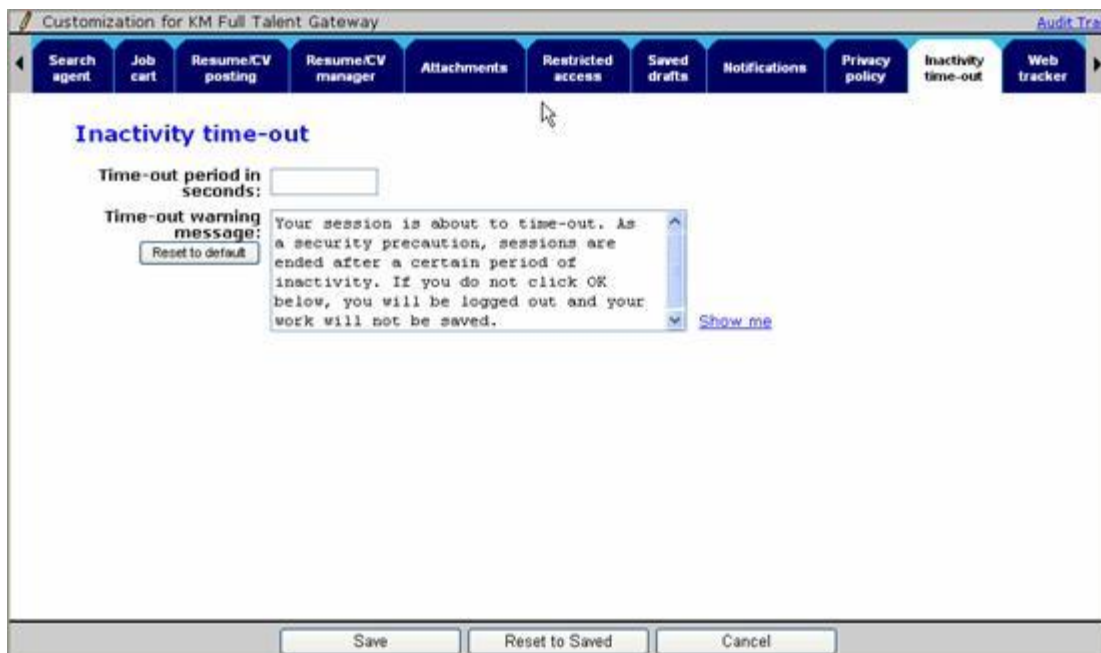
When the Talent Gateway times out due to inactivity, the page is refreshed and all entered data is removed.

When an inactivity time-out occurs on a Full Talent Gateway, the candidate is automatically re-directed to the "landing page not logged in." The user cannot use the browser's Back button to re-enter the site.

Configuring the duration and warning message

To configure the length of time allowed for user inactivity, do the following:

1. In *Workbench*, select Tools > Talent Gateways > Text customization.
2. On the Talent Gateway text customization page, select the Talent Gateway for which you want to configure the inactivity time-out feature and click the Edit icon (the pencil). You must select a Full or Global Talent Gateway.
3. On the Customization page, scroll to the Inactivity time out tab and select it.



4. In the Time-out period in seconds field, enter a positive, whole number (between 60 and 900). This is the amount of time that should elapse from the beginning of user inactivity to when the time-out is executed. The warning message always pops up thirty seconds before the user is logged out. See “Warning message timing” below for more information.

Warning message timing

Time-out period (seconds)	Minutes	Time elapsed when warning message pops up
60	1	30 seconds
300	5	4 min., 30 sec.
600	10	9 min., 30 sec.
900	15	14 min., 30 sec.

5. In the Time-out warning message text box, enter a customized warning message in the if desired. You must ensure that you have a warning message in this box (either a customized one or the default warning message) or else the Gateway will time out without warning users.

You can click Restore to default to go back to the default warning message. The default warning message says:

“Your session is about to time-out. As a security precaution, sessions are ended after a certain period of inactivity. If you do not click OK below, you will be logged out and your work will not be saved.”

6. Do one of the following:

- Click Reset to Saved if you want to go back to your previously saved settings. This works only if you have not yet saved your changes in this session.
- Click Cancel to close the Inactivity time-out tab without saving any changes.
- Click Save to save your new settings.

Localization for Basic Talent Gateways

The Talent Gateway localization settings page in *Workbench* is available for Basic Talent Gateways in this release. It contains fields for date, name, and address formats.

To customize localization settings for Basic Talent Gateways, do the following:

1. Log into *Workbench*.
2. Select Tools > Talent Gateways > Localization settings.
3. On the Talent Gateway localization settings page find the Basic Talent Gateway for which you are changing the localization settings and click Edit.
4. On the Localization settings for <Talent Gateway> page do the following:
 - Select the Date format.
 - Select the Name settings format.
 - Select the Address settings format.
5. Do one of the following:
 - Click Cancel to close the window without saving anything.
 - Click Revert to saved to reinstate a previously saved version (if you have not yet saved your changed in this session).
 - Click Save to save the changes you just made.

The Basic Talent Gateway uses the same settings as Full Talent Gateways for date, name, and address.

Benefits

Clients can offer localized UIs and a better user experience to their non-US Talent Gateway users. In particular, clients can provide locale-specific instructions for address fields.

Overview of implementation

Basic Talent Gateway clients must configure their localizations settings for date, name, and address formats following the instructions in the BrassRing 9 Release Notes – *Workbench* or in the *Workbench Manual*.

Implementation decisions

Clients must decide if their users would benefit from having alternative formatting available for dates, names, and/addresses.