

IBM® Kenexa® BrassRing on Cloud

Self Service Data Migration Tool

Quick Reference Guide

Version 2.0

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Edition Notice

Note: Before using this information and the product it supports, read the information in the *Notices* section at the end of this document.

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Table of Contents

Edition Notice	1
CHAPTER 1: GETTING STARTED	3
1.1 What is SSDM?	3
1.2 Purpose	3
1.3 Audience	3
CHAPTER 2: OVERVIEW.....	4
2.1 Process Overview	4
2.2 How it Works.....	4
CHAPTER 3: CONFIGURE ADMIN SETTINGS	5
3.1 Filling in FTP Settings	5
3.2 Filling additional settings (optional) –.....	6
CHAPTER 4: CREATING A NEW MIGRATION	7
WORKING WITH THE TASK MANAGER	9
4.1 Generating Schema	9
4.2 Validating Data	10
4.3 Loading Data into BrassRing	13
4.4 E-mail Correspondence.....	14
Notices	15
Trademarks	16

Chapter 1: Getting Started

1.1 What is SSDM?

Self Service Data Migration Tool (SSDM) is a self–service data migration tool in BrassRing Workbench used to migrate data from an external source legacy system (clients) into the BrassRing Applicant Tracking System (ATS). Clients using this tool can migrate information related to candidates, requisitions, candidate codes, HR statuses, attachments and much more.

Data files transferred using the SSDM tool, use Secure Transfer File Protocol (SFTP) that encodes the data with has AES encryption (Access DB for Access DB, which is a password protected zip file, as a kind of security, while transferring data from a client's external system to an SFTP location. Data files transmitted from a client's external system to an SFTP location are sent as password protected zip files.

The SSDM tool reduces the current implementation timeline for ongoing data migrations. Client responsibility is to provide BrassRing with valid data in the Access database and to validate the data with the help of error reports using the SSDM tool before transmitting this data to the BrassRing system.

1.2 Purpose

The purpose of this document is to:

- Describe the workflow a user needs to follow to migrate legacy data into BrassRing
- List the tasks in which clients and PSE teams are involved namely,
 - Schema generation,
 - Data validation process and
 - Loading data into BrassRing

1.3 Audience

- Client Decision Makers, HRIS Implementation Teams, Internal IT Teams, Systems Integrators and Support Teams.
- BrassRing Engineering Services Team, Support Team, and Technical Services Group.

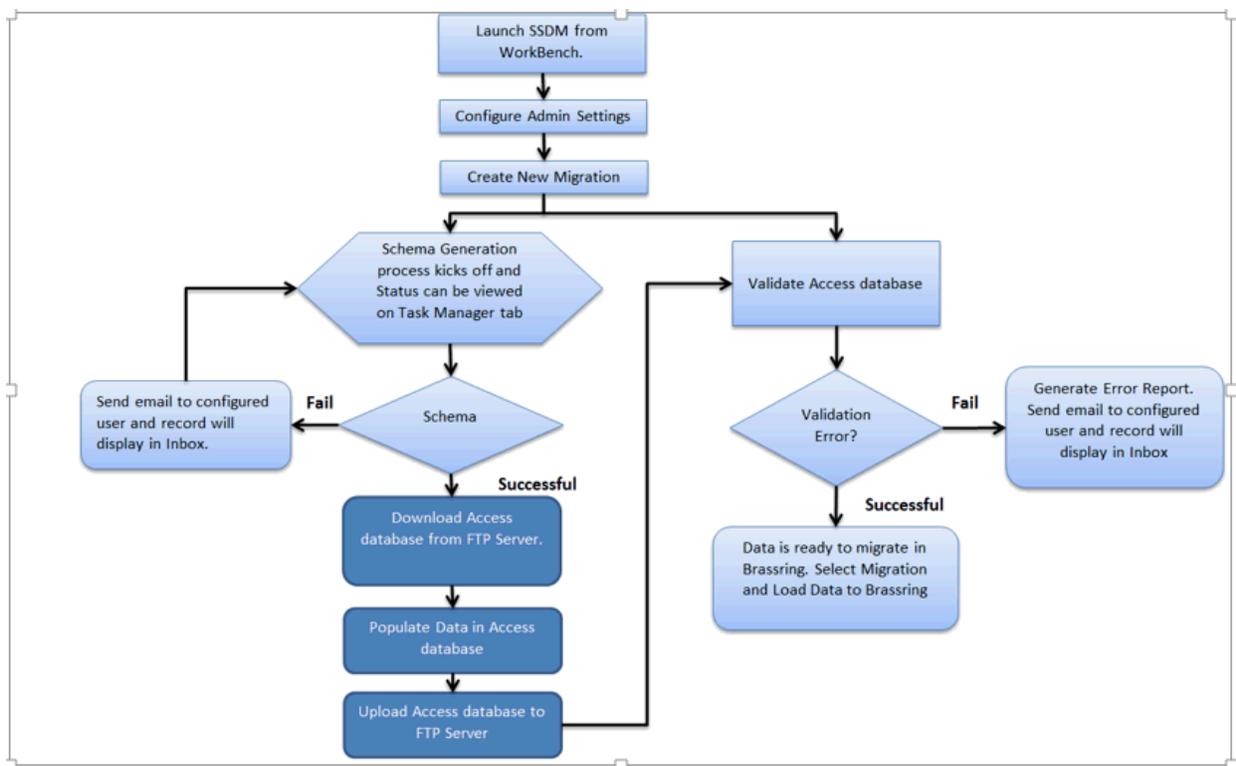
Chapter 2: Overview

2.1 Process Overview

The Self-Service Data Migration process involves:

- Configuring admin settings
- Creating a new migration
- Generating schema
- Downloading the Access database
- Uploading the database,
- Validating the data
- Loading the validated date into BrassRing

2.2 How it Works



Chapter 3: Configure Admin Settings

3.1 Filling in FTP Settings

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Getting Started | New Migration | Task Manager | Admin Settings | Inbox | Help | Contact Us

Migration Settings for PPL-LOG/RU (Please enter below FTP details)

Hosted By: Client Kenexa/IBM

Address: Port No:

User Name: Password:

Encryption: Yes No

Encryption Key:

E-mail:

Additional Settings

Requisition Manifest Name:

Requisition Tag: Optional Req Auto Req

Handle Un-opened Requisitions: Yes No

Requisition Team Identifier:

Migration Source Code:

Candidate Submission Site:

Candidate Stacking Rule:

Candidate Talent Form:

Delete Existing HR Status: Yes No

Alternate Candidate Stacking Rule:

Option Delimiter:

- **Hosted by:** If the customer has FTP details, the **Client** radio button appears pre-selected. If the customer does not have the FTP details, they can use IBM provided FTP details and select **Kenexa-IBM** radio button. Reach out to the product managers for an SFTP request.
- **Address*** - The FTP address where your data file has to be uploaded.
- **Port No.*** - The port number used to connect to the FTP site
- **Username *** - The username used to connect to the FTP site
- **Password*** - The password used to connect to the FTP site
- **Encryption Key*** - *Set up the encryption key* – The **Encryption Key*** acts as a password for the zipped file – the schema is sent with this password. The **Generate Key** can be used to generate an auto random password, which is the “encryption key”.
- **E-mail*** - *Set up the e-mail address* – The recipient email addresses entered here in the **E-mail address*** field receive notifications periodically about the status of migration (could be “Successful, Failed – Schema generated, Data validation, Loading into BrassRing.) Multiple e-mail addresses are allowed with no maximum limit. Click the **Add E-mail** button to add email addresses.

3.2 Filling additional settings (optional) –

1. **Req Tag** – This refers to the type of the data, which includes either an Optional Req (Client HRIS system reference number) OR an Auto Req (Brassring Re sourceeq reference number) that client provides to uniquely identify the existence of the requisition to create/update the requisition.
Should this be sourceeq or just source in the previous sentence
2. **Handle unopened req-** If the option is **Yes** then requisition migration happens only to Open requisitions. If the option is **No**, then it allows to migrate reqs with every other status including an Open status. By default, the option YES is selected.
3. **Migration Source Code** – This field is to identify if the source of the candidate record in BrassRing was data migration or other sources like default creation of a candidate in the BrassRing system itself.
Good to know: All migration source codes configured in *Workbench>Tools>Settings>Code Types* menu appear as options in the **Migration Source Code** field.
4. **Candidate Stacking Rule** – While migrating the candidate, stacking rule criteria is used to search and identify if a candidate is a part of the Applicant Master list.
5. **Delete Existing HR Status** – The option **Yes** deletes HR statuses for given candidates prior to migration. The default option **No** retains all HR status information.

NOTE: Please fill all the mandatory fields.

Chapter 4: Creating a New Migration

Once Admin Settings are configured at a client level, the next step is to create a new migration request. The migration request is where data is selected in the Access database for migration (as a file) and then validated and loaded into BrassRing from the Task Manager screen.

NOTE: When migrating all Candidate-related data or HR Status, Candidates and Requisitions should be migrated **before** migrating/validating Candidate Forms/Notes, or HR Statuses. Additionally, Candidates/Requisitions should exist in BrassRing if migrating Forms/Notes/HR Statuses for related Candidates.

1. Select fields as required –

Name – Fill in an easy and **unique** identifier name for this migration request. A maximum of eight characters are allowed that can include alphanumeric characters and the _ symbol. Other special characters are not accepted.

Additional Migration Options

- **Requisition Data** – This check box is selected to migrate requisition data to the Access database.
- **Candidate Data** – This check box is selected to migrate candidate data to the Access database.
- **Post Requisitions to Talent Gateways** – This checkbox appears once Requisition Data checkbox is selected. This check box is selected to fill Talent Gateway Postings option in the Access database.

Self Service Data Migration

- **Candidate Codes** – This check box appears once Candidate Data checkbox is selected. This checkbox is selected to fill Codes column in the Access database.
 - **Candidate Attachments** – This check box appears once you select Candidate Data. Select this checkbox to fill the Attachments column in the Access database.
 - **Candidate Notes** – This check box is selected to fill Notes column in the Access database.
 - **Hiring Status** – This check box is selected to migrate all HR status information of candidates
 - **Forms** – This check box is selected to migrate the Candidate forms available for the client.
2. Select **Submit** after selecting the required data to be migrated. Once you click **Submit**, the system creates a new migration request, which appears in the Task Manager screen for further action.

Working with the Task Manager

Browse to your new migration request in the Task Manager screen. There are three required tasks to complete for every new migration request.

- **Generate Schema** – Generates an Access DB file and upload it at the SFTP address specified in Admin settings.
- **Validate Data** – Asks for the Access DB schema with data as the input and validates it. Generate an error report to view discrepancies.
- **Load Validated Data into BrassRing** – Loads validated data into BrassRing and completes the process.

The screenshot shows the Task Manager interface with a table of migration tasks. The table has columns for Migration Name, Migration Type, Access Database File Name, Action Type, Status, Date Created, and Created By. The tasks are listed in a grid, with a search bar and a display options menu at the top.

Migration Name	Migration Type	Access Database File Name	Action Type	Status	Date Created	Created By
Igor_Test_2	HRStatus Import	N/A	Schema Generation	Not Processed	10/26/2016 3:26:21 PM	Integration, System
Igor_Test_2	Forms Import	N/A	Schema Generation	Not Processed	10/26/2016 3:26:21 PM	Integration, System
Igor_Test_2	Candidate Notes Import	N/A	Schema Generation	Not Processed	10/26/2016 3:26:21 PM	Integration, System
Igor_Test_2	Candidate Attachments Import	N/A	Schema Generation	Not Processed	10/26/2016 3:26:21 PM	Integration, System
Igor_Test_2	Candidates Import	N/A	Schema Generation	Not Processed	10/26/2016 3:26:21 PM	Integration, System
Igor_Test_2	Requisitions Import	N/A	Schema Generation	Not Processed	10/26/2016 3:26:21 PM	Integration, System
Igor_Test101	HRStatus Import	N/A	Schema Generation	Not Processed	10/26/2016 12:00:34 PM	Integration, System
Igor_Test101	Forms Import	N/A	Schema Generation	Not Processed	10/26/2016 12:00:34 PM	Integration, System
Igor_Test101	Candidate Notes Import	N/A	Schema Generation	Not Processed	10/26/2016 12:00:34 PM	Integration, System
Igor_Test101	Candidate Attachments Import	N/A	Schema Generation	Not Processed	10/26/2016 12:00:34 PM	Integration, System
Igor_Test101	Candidates Import	N/A	Schema Generation	Not Processed	10/26/2016 12:00:34 PM	Integration, System
Igor_Test101	Requisitions Import	N/A	Schema Generation	Not Processed	10/26/2016 12:00:34 PM	Integration, System
PSEQATestPPL	Candidate Notes Import	N/A	Schema Generation	Not Processed	10/19/2016 9:17:59 AM	Integration, System
PSEQATestPPL	Candidates Import	N/A	Schema Generation	Not Processed	10/19/2016 9:17:59 AM	Integration, System
ig_testteste	Candidate Notes Import	N/A	Schema Generation	Not Processed	10/14/2016 1:32:01 PM	Integration, System

Tip: Use the Search and Display fields to find or navigate records respectively.

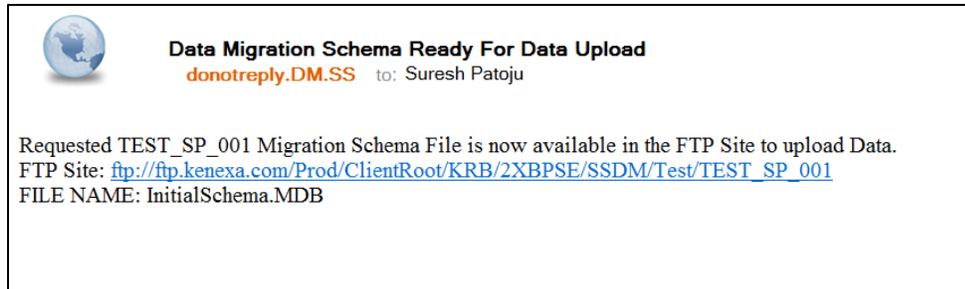
4.1 Generating Schema

Select the **Migration Name** and select the **Generate Schema** hyperlink. It takes approximately 20 minutes to generate. When the status turns to “In Progress”, this indicates that your request is in queue; it does not indicate that the generation process has started. If there is more than one migration type, all with the same Migration Name, whether you select all of them or only a few of them, note that schema generates for all irrespectively. The Status at the end of the process changes to “Complete” for all migration types under a common Migration Name.

Status indicators:

When the schema generation starts, the Status indicator turns to “Schema Generation in Progress”. When the schema generation is complete, the Status indicator turns to “FTP Upload in Progress”. When the schema is uploaded to the FTP address, the Status indicator turns to “Complete” which means your schema is ready in the Access Database for further action. When the schema generation is unsuccessful, the Status indicator turns to “Failed”.

An email notifying the task status is sent to the e-mail addresses you specified in Admin settings.



Note: The standard default name of the schema file is "InitialSchema.ZIP".

4.2 Validating Data

Before selecting a Migration Name to validate your data, you need to manually prepare a zipped file containing the data to be migrated into BrassRing. Once prepared, you manually upload the file to the SFTP address.

Preparing your zipped file

1. Check your *InitialSchema.ZIP* file at the SFTP Address specified in *Admin Settings > Migration Settings* and download the file.
2. Extract the file to view the schema. Enter the password to open the file. This is the password which you auto generated under *Admin Settings > Migration Settings* section in the **Encryption Key** field. The file gets extracted. Once you extract the file, note that the file extension changes from *.zip to *.MDB

Note: Do ensure that the tool you use for file extraction supports AES 256 encryption.

3. Fill in required data into the Access DB tables and save.

Note: If you have attachments to migrate, ensure that you create a sub folder "Attachments" and upload a zipped and password protected file containing all attachments to this folder at the SFTP address and specify the attachment file names in the Access database. If you have a huge volume of attachments, multiple zipped files can be uploaded to the "Attachments" sub folder.

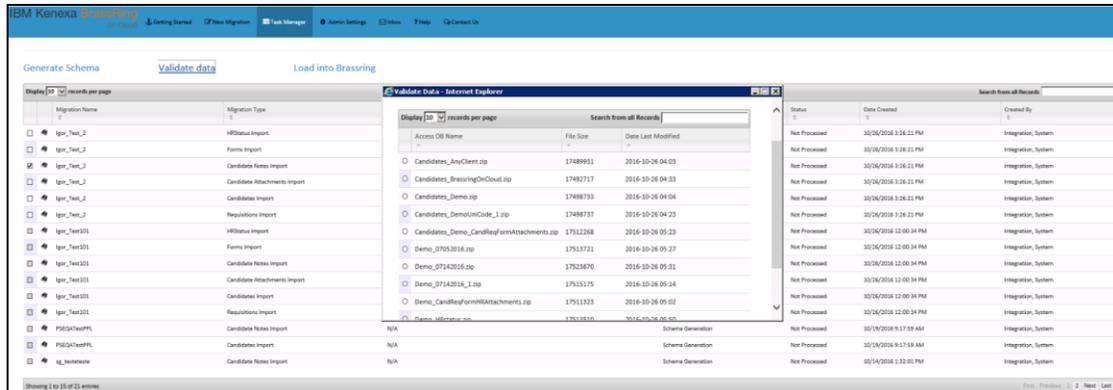
4. Upload the Access Database file at the SFTP address specified in the **Address** field of *Admin Settings > Migration Settings*. The file needs to be a ZIPPED FILE ONLY with password protection.

Note: Use the same auto generated password (used to extract the file) to protect this re-uploaded file.

The zipped file is now ready for validation.

Validating data

1. In the Task Manager screen, select the **Migration Name** that you need to validate. Select the **Validate Data** hyperlink. A pop-up window opens and lists all the zipped files available at the specified Address (SFTP) location.



2. Select the Access DB Name where you have filled up all data.
3. Select **Submit**. The Task Manager screen returns. The Action Type column now changes to “Data Validation” and Status to “Not Processed.” This indicates your validation request is in queue. Wait for two to 3 minutes for the processing to begin. The status changes to “In Progress” and once the validating is done, the status changes to “Complete” or “Failed”.

Note: If you see the Status display “Failed”, do the following:

1. Select the **Migration Name** and click the binoculars icon next to it. This generates an error report in an Excel. When you open the report, the Excel report has two tabs, **Properties** and **Migration Type** (say **Candidates** in the sample image).
 - Properties tab has the nature of migration and client details information.
 - Migration tab has the actual error details of data in the Access database.
 - Migration ID – This is for IBM’ internal reference.
 - Element – Refers to the row number in the Access database.
 - Identifier – Refers to the field name in the Access database. *Eg: Candidate Type in Candidates table.*
 - Description – Details of the data, which is not valid
 - Added on – The data and time when the validation took place

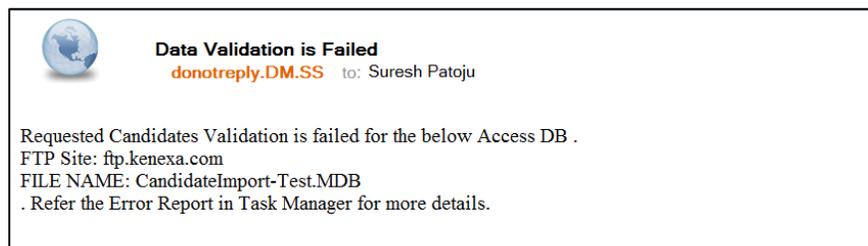
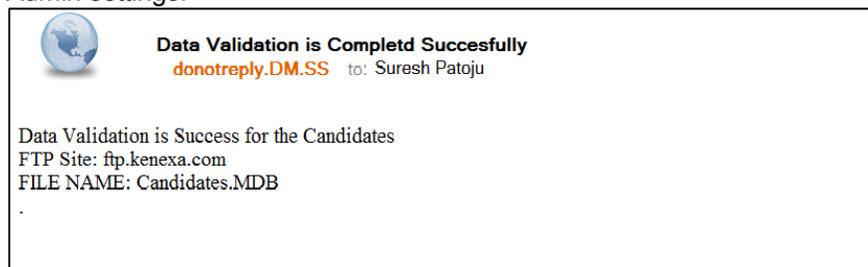
	A	B	C	D
1				
2				
3	Client Name	BaseLibrary TimeToValue6		
4	Client ID	26418		
5	Error Count	1		
6	MigrationID	522		
7	Error Summary	Candidate		
8				
9				
10	Error Date Range	12/15/2016 5:57:22 AM to 12/15/2016 5:57:22 AM		
11	Report Produced On	12/15/2016 5:57:25 AM		
12				
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14				
15				
16				
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- Open the report and look for discrepancies. Look for the **Identifier** column in the error report and find the same corresponding column in the Access database. Verify that the data in both columns tally. If incorrect, correct the same. Say the *Candidate type* is invalid, cross verify if that *Candidate Type* exists in Brassring by checking under the *Tools* menu in Workbench. To correct this error, add the missing or invalid *Candidate Type* as a new Candidate Type in Workbench or note the existing valid Candidate Types in Workbench and include one of those as the valid candidate type in the Access database file.

MigrationID	Element	Identifier	Description	AddedOn
522	99965	CandidateType	Direct is not an active, valid Candidate Type	12/15/2016 5:57:22 AM

- Rezip the Access database file with the corrected data, (following the “Preparing the zipped file” procedure above) and re-upload it at the SFTP address.
- Select the **Migration Name** and select **Validate Data** once again in the Task Manager screen. Repeat the procedure stated in the **Validating data** section until the validation Status field displays *Complete* in the Task Manager screen.

Note: An email notifying the validation status is sent to the e-mail addresses you specified in Admin settings.



4.3 Loading Data into BrassRing

To load your successfully validated data into BrassRing, select the Migration Type and click the **Load into Brassring** hyperlink in the Task Manager screen. The Action Type changes to “Data Migration”. The Status displays as “Not Processed” which indicates your request is in queue and progressively changes to “Loading Data in Progress” and finally to “Complete”.

Select the binoculars icon to view the Status report with a count of successful and failed records.

4.3.1 Verifying Migrated Candidates and Requisitions in BrassRing

NOTE: Migrated Candidates can be verified in BrassRing using the new candidate ref number that is located in the Candidate Mapping Report. The Candidate Mapping report contains old Candidate reference and new Candidate reference number in BrassRing and can be downloaded from in BrassRing from Reports--> Candidate Mapping.

Similarly, Requisitions can be verified in BrassRing either using old req number as optional req number

OR using new AutoReqid. Requisition Mapping report contains old reference and new BrassRing AutoReqid and can be downloaded in BrassRing from Data Migration tool--> Reports--> Requisition Mapping.

4.4 E-mail Correspondence

The Inbox tab contains a log of the entire email correspondence sent out to responsible users regarding task statuses, whether it is schema generation, validating data, or loading into Brassring,

Inbox ID	Client ID	User ID	Sent To	Subject	Body	Received On	Trash
70	25946	795	suresh.patoju@in.ibm.com	Data Validation is Completed Successfully	Data Validation is Success for the Candidates FTP Site: ftp.kenexa.com FILE NAME: Candidates.MDB	5/19/2016 7:06:11 AM	0
78	25946	795	suresh.patoju@in.ibm.com	Data Validation is Completed Successfully	Data Validation is Success for the Candidates FTP Site: ftp.kenexa.com FILE NAME: Candidates.MDB	5/20/2016 3:19:55 AM	0
79	25946	795	suresh.patoju@in.ibm.com	Data Validation is Completed Successfully	Data Validation is Success for the Candidates FTP Site: ftp.kenexa.com FILE NAME: Candidates.MDB	5/20/2016 3:29:48 AM	0

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