BrassRing, Lead Manager and Onboard Release Notes - January 2022

January 2022

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BrassRing January'22 Release

BrassRing new features for release 22.01.17 are listed here.

Client Reminders

The Client Reminders section reminds clients of recently distributed important notices and links to comprehensive documentation and training for the special features recently introduced.

Enhancements - You Asked We Listened

We are proud to inform that this build introduces features that were developed in response to clients' Requests for Enhancement (RFEs). Infinite is pleased to deliver these features in response to your responses and comments.

Requests for Enhancement (RFEs)

The following features were delivered in response to the RFEs posted on Aha!

- Interview Manager - Microsoft Teams Integration
- New Field - Preferred Name
- Talent Gateways - Throttle Send to Friend Emails
- Workbench Enhancement - Updates to Add New Client page
- Rules Automation Manager - Search Logs - View Box

Dark Launch Features

Dark Launch features are those features that are released to the Staging environment only and are NOT released to the Production environment for a considerable amount of time.

This process gives an opportunity and enough time to test these features thoroughly before they are available in the production environment. Clients are requested to configure and test these features and provide their feedback and inputs to your respective Infinite representatives.

New Field - Preferred Name

> **NOTE**
> This feature is deployed to the *Staging environment - Only* with the current release. This feature will NOT be released to Production on 25 January 2022. The production date is yet to be determined. See the upcoming release notes for status updates on this feature.

Based on client request, starting this release, a new field "Preferred Name" is added to the Talent Gateways and in BrassRing.

The field that was previously called the "Last name pronunciation key" is now transitioned to be used as the Preferred Name field.

As a part of the transition, this field is updated for consistency with the other contact fields in the Candidate zone and Gateway Questionnaire Apply.

Similarly, the Last name pronunciation key field is updated across Workbench to be used as and displayed as the Preferred Name field. In addition to the changes across the user interface in BrassRing,

Talent Gateways, Gateway Questionnaires, etc., the field is also updated in the backend database tables.

BrassRing Visible Changes

The BrassRing visible changes for the current release are listed here.

Talent Gateways - Throttle Send to Friend Emails

Based on a client request, starting this release, restrictions are implemented on the number of times the "Send to Friend" email can be sent from a Talent Gateway per day by a candidate.

When a threshold of 100 emails is reached from the same email address, from the same client, from the same siteID (Talent Gateway), and the same IP address, on a given day, the system does not send out any more emails from the Send to Friend feature for that user. However, the Talent Gateway user does not receive any indication that the emails are not being sent. The email count is reset to zero after each day.

On the back-end, a record is maintained when such a threshold is reached.

RTC internal reference # 304006.

Configurable Changes

The BrassRing configurable changes for the current release are listed here.

Interview Manager - Microsoft Teams Integration

Based on client requests, new settings were added in the Interview Manager so that clients can integrate Interview Manager with Microsoft Teams.

Based on the integration, an Interview Manager coordinator can seamlessly schedule interviews that make use of our Microsoft Teams Meeting URL and send them to interviewers and candidates. Similarly, Interviewers can easily accept or decline interview invitations as I do for any other Microsoft Teams Meeting invitation and have that response recorded in the interview manager.

Clients can use their existing Azure app set up, to add Microsoft teams. The following are the two scopes available and one of them must be selected based on the client's preference:

• Calendars.ReadWrite (Admin consent needed for this scope) or
• OnlineMeetings.ReadWrite (Admin consent not needed)

Workflow: Interview Manager > Create Interview

1. Supported Interview formats for Teams integration: Video, Phone
2. If the Workbench setting is enabled and the interview format is Video or Phone, then a new interview level checkbox with the label "Microsoft Teams meeting" is displayed when one of the above interview formats is selected.
3. Selecting this checkbox hides the Interview format details field.
4. The same set of rules and user interface must be respected for Edit Interview Details.

Workflow: Send Invitation (for interviews with "Microsoft Teams meeting" setting enabled)

1. Without admin consent (OnlineMeetings.ReadWrite scope):
   a. If the coordinator is not currently signed into Outlook 365 through Interview Manager.
      i. Clicking "send invites" button to display a dialog with a Sign-in button.
      ii. Clicking this button launches a pop-up window redirecting the user to the Outlook 365 login page. When user is signed-in, the invitation is sent.
      iii. A confirmation message is displayed (existing feature)
   b. If the coordinator is already Signed into Outlook 365 through Interview Manager (send invites page displays a label at the top right side "Signed in to Outlook 365")

    i. Click the "send invites" button to send the invitation.

    ii. A confirmation message is displayed (existing feature).

  c. The Team Meetings URL is merged in place of the "InterviewFormatDetails" token. If the token does not exist in the template, it will be placed at the end of the email body.

2. With admin consent (Calendars.ReadWrite scope) (all users are automatically signed in to Outlook 365)

  a. Send invites page displays a label at the top right side *Signed in to Outlook 365*

  b. "InterviewFormatDetails" token is not allowed in the template for Admin consent workflow as the Teams Meeting URL is always appended to the invitation body. A validation message is displayed to remove this token on clicking *Send Invites* in this workflow.

3. The existing validation for the "Interview format details" field to be mandatory is removed (since it is automatically filled with the Team Meetings URL).

4. In an event where either of the Azure app setting is no longer enabled, then the "Send Invites" workflow behaves as if "Microsoft Teams meeting" is NOT enabled.

5. For Preview, (interviewer or candidate communication on Send Invitations page), the token [#InterviewStandard:InterviewFormatdetails#] shows "Microsoft Teams meeting" non-hyperlinked, regardless of other circumstances (whether the user is signed in or signed out of Outlook 365).

Interview Experience

1. With admin consent:

  a. Invitations are sent to the interviewer (system users) as an outlook meeting invite (with Teams link).

  b. The interviewer can accept or decline the invitation directly from their outlook.

  c. Accepting or declining the invitation via Outlook is reflected within Interview Manager and the coordinator receives the acknowledgment via outlook automatically.

    i. In an event where either of the Azure app setting is no longer enabled, then this workflow will NOT send any updates to Interview Manager.

  d. The coordinator sees this meeting in their own calendar (as an organizer).

  e. The "View invite" page does not have the controls to accept or decline in this case. The interviewer can see the interview details on this page if needed.

  f. The **Join Teams Meeting** button is available for this meeting in all cases.

2. Without admin consent:

  a. The interviewer receives a regular email with Teams meeting URL in the body (either merged for "InterviewFormatDetails" token or at the end of the body).

  b. Upon accepting the invitation from the **View Invite** page, the interviewer will receive a "calendar" invite(ics) which they can add to their calendar. (existing functionality).

  c. The coordinator does not have this meeting on their calendar. (existing functionality).

Candidate Experience

The candidates do not see any changes in their experience while accepting or declining an interview. Candidates receive the regular invitation email first, followed by the calendar invite.

The only update to candidate experience is the new Teams Meeting URL in the email body, which is automatically populated for Interview Format Details token.

Reschedule: (ONLY applies to interviews created with the "Microsoft Teams meeting" setting enabled)

1. If original Invitation was sent using admin consent option (i.e direct teams invite):

  a. Updates to the interview schedule are sent as an outlook rescheduled meeting.

2. If original Invitation was sent without admin consent option:

  a. Updates are sent as a regular email first, followed by a calendar (ics) update.

3. In an event where either of the Azure app setting is no longer enabled, then "Reschedule" workflow will behave as if "Microsoft Teams meeting" is NOT enabled.

    a.   Prior invites are to be removed manually by the Interviewers. (As there would be no way to correlate the Teams based invites with the Rescheduled meeting invites).

Cancel Interview: (ONLY applies to interviews created with the "Microsoft Teams meeting" setting enabled)

1. If the original Invitation was sent using the admin consent option (i.e direct teams invite):
   a. Cancellation is sent against the original outlook teams meeting.
2. If the original Invitation was sent without admin consent option:
   a. Cancellation is sent with a "Remove from calendar" (ics) option. (existing functionality)
3. In an event where either of the Azure app setting (ref 1b) is no longer enabled, then "Cancel" workflow will behave as if "Microsoft Teams meeting" is NOT enabled.
   a. Prior invites are to be removed manually by the Interviewers. (Since there is no way to correlate the Teams based invites with the Canceled meeting invites)

Interview Manager > Basic details: (for interviews with "Microsoft Teams meeting" setting enabled):

1. Format details are displayed as "Microsoft Teams Meeting".
2. Editing the format or turning off teams meeting for an interview(using the new checkbox) is allowed only for the following statuses:
   a. To Be Scheduled
   b. Candidate Availability Requested
   c. Candidate Availability Received
   d. Candidate Availability Declined
   e. Invitation Pending
3. If the interview is in any other status than mentioned above, the FORMAT and DETAILS cannot be edited (the pencil icon is hidden).
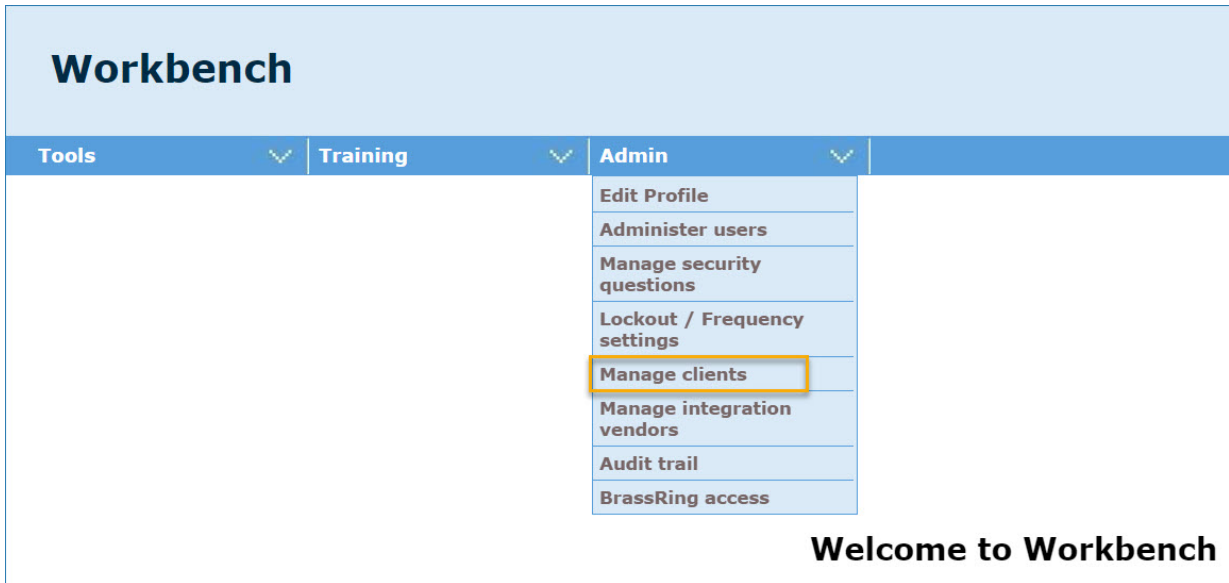
RTC internal reference #302001.

BrassRing Workbench

BrassRing Workbench changes delivered during the current release are listed here.

Workbench Enhancement - Updates to Add New Client page

As a part of Workbench enhancements, the following updates are made to **Add New Client** page:

• Update "Search Engine (DSN/DBname/Server)" to ***Database name**
• Add DB Name in parenthesis to the Collection name list
• Rename "Prefix" to **Unique 3 Letter code (Prefix)**
• Hide the following controls:
  • Contract Level (default: Platinum)
  • BrassRing Version (default: 13.0)
  • Acknowledgments (Default: No)
  • Acknowledgment insert code (Default: "")
  • Email PDF (Default: Yes)
  • ICN Number (Default: "")
  • Country Code (Default: "")
• Rename "HS user e-mail" to **BrassRing internal contact e-mail**
• Rename the label "* Config custom login" to **Login type** and change the option label "Custom login" to **Custom login (SSO)**.
• Rename "Internal Infinite Talent" to **Internal**.

RTC internal reference#304534.

## Rules Automation Manager - Search Logs - View Box

The RAM log search box contains a view box at the end of the search. This box helps users see the entire name when they select a log. The view box is not visible when users access Workbench using the Chrome browser. This is addressed in the current release. Users can now see the view box while accessing Workbench using the Chrome browser.
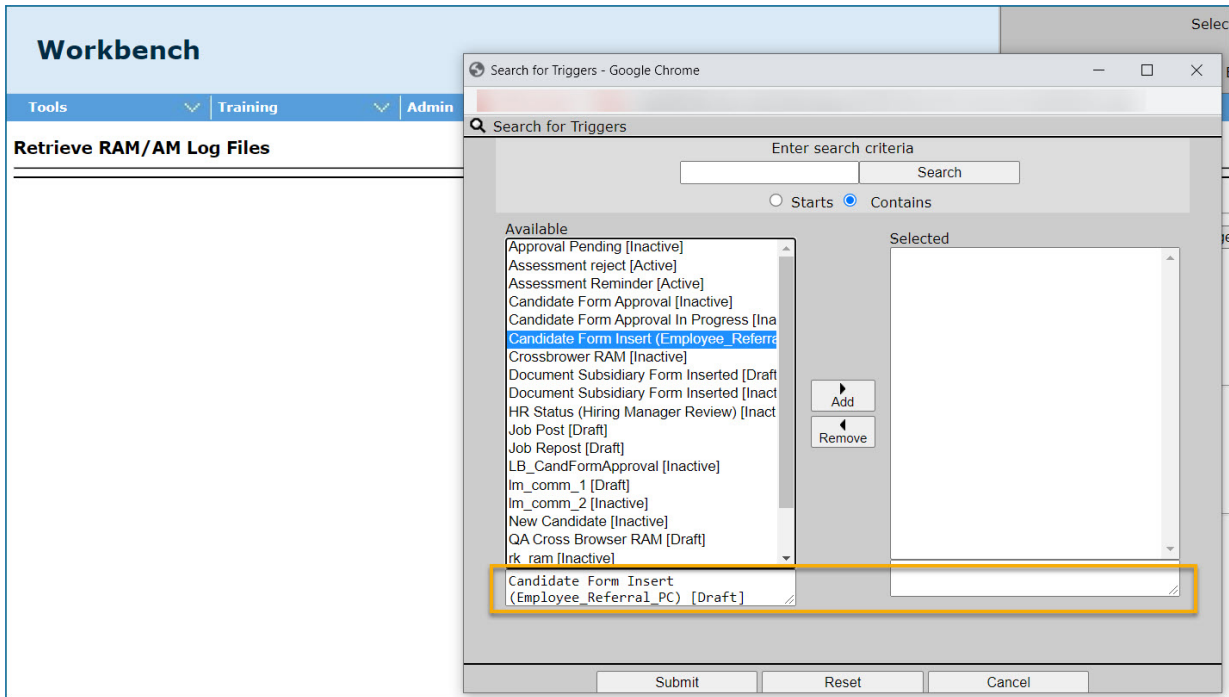
RTC internal reference # 305424.

Interview Manager - New Calendar Configuration Setting

A new calendar configuration setting is added to the Workbench path: **Tools > Interview Manager > Calendar Configuration > Outlook 365**. The setting **Allow Interview Manager to create Teams Meetings** is added. This check box must be selected to configure Microsoft Teams integration and test it.
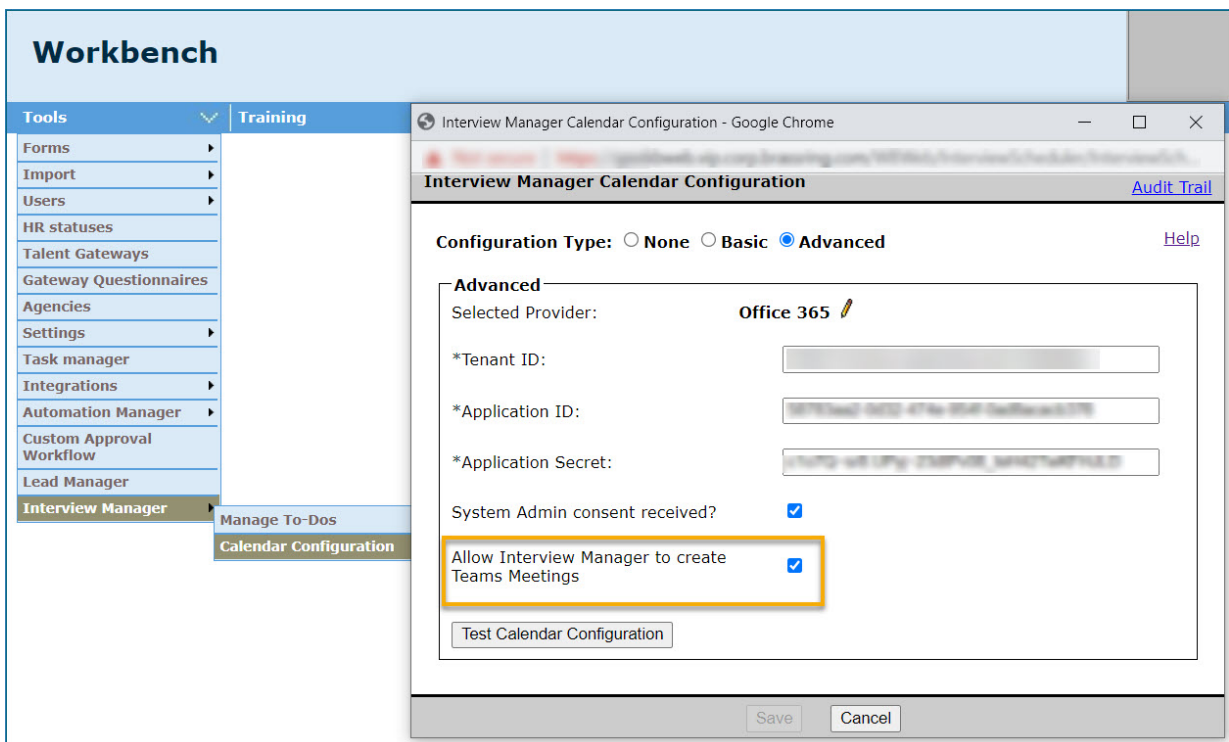
RTC internal reference #302001.

Lead Manager January'22 Release

There are no new features delivered during this release for Lead Manager.

Lead Manager January'22 Release

Onboard January'22 Release

Onboard new features for the January release are listed here.

Onboard Visible Changes

Onboard new features for the current release are listed here.

Attachments - Include Signed Forms

Previously, attachments in the correspondence section of the workflow configuration will not send signed forms upon Task completion.

Starting this release, signed forms are sent for attachments selected in the correspondence section of the workflow configuration.

RTC internal reference # 303947.

New State Form - Colorado State

The state of Colorado has a new tax form (DR-0004 Colorado Employee Withholding Certificate) for 2022, that can be added to the State form activity in Onboard. This form is now added and avaialble in the Onboard system.

RTC internal reference # 304988.

Tax Credit Check Activity - Error Messaging

Previously, when either the Tax Credit Check or the Tax Credit Check Confirmation activity are selected from the Task List or My Task List page, if an error occurs at BWS, the error was not displayed. Instead, the screen was refreshing.

Starting this release, the page does not refresh, and the error is displayed.

RTC internal reference # 246145.

New Federal Form - W4 2022

A new W4 - 2022 form is added to Onboard during the current release. This form is titled *Employee's Withholding Certificate* and is a W4 form.

RTC internal reference # 305691.

Onboard Configuration Changes

There are no Onboard configurable features for the current release.

Onboard Fixed Defects

The following defects are fixed during the current release.

Table 1. Fixed Defects

RTC Defect Number	Defect Description
245528	TS005556406 - US Production - Tax Credit Check activity not loading
246028	TS005969815 - E-verify - Issues
303484	TS006605951 - Unable to access I9 Section 2 from Safari from initial homepage - Even on Chrome
303696	TS006780787 - File "/TWCOBEE*.pgp" not found
304722	00046706 - Unable to send B to O due to job title translation
305485	00059868 - Unable to complete Section 3