BrassRing, Lead Manager and Onboard Release Notes - March 2022

March 2022

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BrassRing March'22 Release

BrassRing new features for release 22.03.15 are listed here.

BrassRing 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.

Ideas - You Asked We Listened

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

Ideas

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

- Candidates - Privacy Policy Update Log
- Talent Gateway Sign-In - Two Factor Email Authentication
- Recruiter Experience - Field Help Text Display on Grids

BrassRing 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.

Rules Automation Manager (RAM) - Automation Manager Trigger Migration

NOTE

This feature is deployed to the **Staging environment - Only** with the current release. This feature will NOT be released to Production on 22 March 2022. The production date is yet to be determined. See the upcoming release notes for status updates on this feature.

As a part of the product enhancements, the existing Automation Manager (AM) triggers are converted to RAM triggers. In the current release, the AM Trigger **Candidate HR Status - Send Talent Record** is converted to a RAM trigger. A corresponding "draft" RAM trigger is created for all the clients that use this AM trigger. Clients can test this RAM trigger before they activate it.

RTC internal reference # 296258.

BrassRing Visible Changes

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

Talent Gateway Sign-In - Two Factor Email Authentication

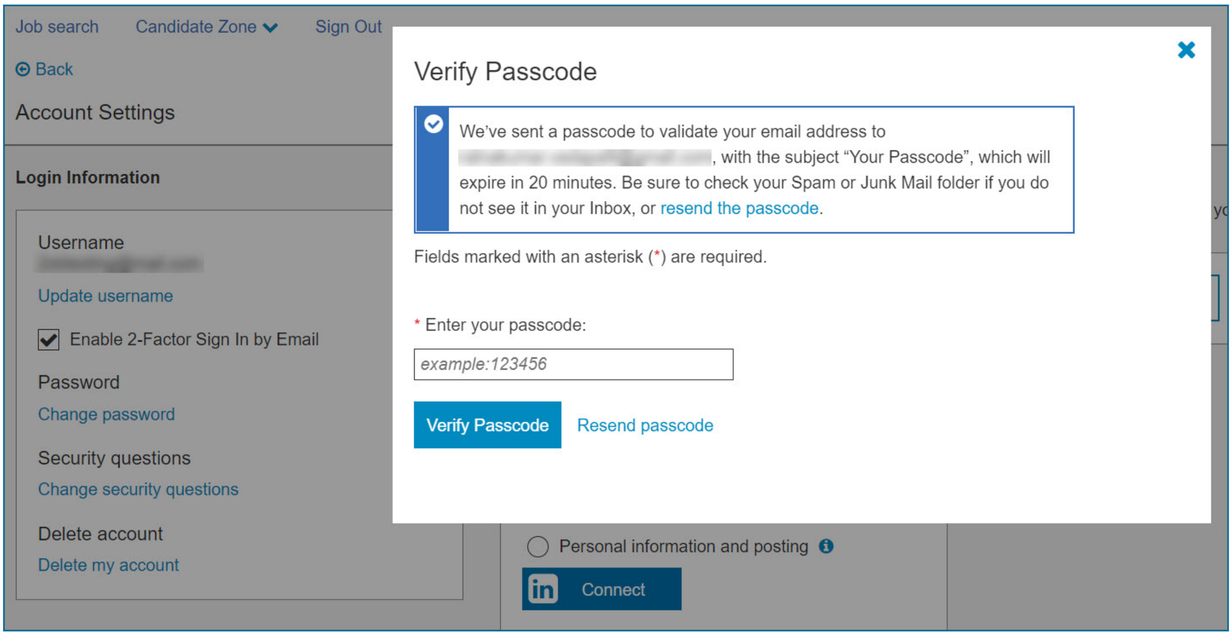
Starting this release, candidates have the option to set up Two-Factor authentication when they log in to their Talent Gateway profile. Two-Factor Authentication provides an additional layer of security to the candidate's Talent Gateway account.

When this authentication is enabled by the candidate, each time the candidate tries to log in (with a successful username/email and password), an email with a passcode is sent to the candidate's email address present on the candidate's profile. The candidate is able to log in only after providing the passcode in addition to the profile password.

The following are the prerequisites for two-factor authentication:

- The candidate's Talent Gateway profile must have a contact email address saved.
- Talent Gateway Setting "Sign in availability for candidates" must not be set to Disable sign-in (the Talent Gateway must either allow candidates to log in or allow candidates to skip sign-in).
- Talent Gateway setting "Talent Gateway SSO" = No

Two-Factor authentication can be set up or removed by the candidates from the Account settings section in the Candidate Zone of the Talent Gateways. A new check box **Enable 2-Factor Sign In by Email** is added for this setting in the Account settings section. When candidates select this checkbox, the system verifies the candidate's contact email address. If there is no email address for the candidate on the profile, a message is displayed asking the candidate to provide an email address. If an email is already present, the system sends a validation email with a passcode to that email address. The candidate enters the passcode to confirm the setting.



When a candidate tries to uncheck the box, to remove Two-Factor authentication, a message is displayed: "Are you sure you want to turn off the "Enable 2-Factor Sign In by Email" setting?" The candidate selects Ok to confirm.

The validity of the passcode received in an email is 20 minutes. If the passcode is entered after 20 minutes of receiving the email, the passcode does not work. Candidates can use the Resend passcode option to have the passcode resent to their email address.

RTC internal reference # 303526.

Talent Gateways - Forgot Password Workflow Optimization

The Forgot password option in Talent Gateway profiles previously required the candidates to first select a method (answer security questions or have the system send an email with a passcode) and in the security questions workflow, the candidate was required to answer up to three security questions.

Starting this release, to optimize the candidate experience, the system directly sends the passcode email to the candidates upon accessing the Forgot password link. Candidates can have up to 5 passcode emails sent to their email address and use the passcode to create a new password for their Talent Gateway profile.

An alternative option is provided on this page, in the case the candidate does not have access to the contact email address on their profile. The following message is displayed at the end of the page:

If you're unable to access your email address (associated with this account), you can answer a security question. This line also provides the hyperlink that takes the candidates to the security questions page.

The Security questions page displays only one question. If the client setting is configured to display more than one question, only one of the candidate's saved questions is picked at random and displayed to the candidate. A message is displayed at the end of the page leading the candidate to the send passcode workflow if the candidate is unable to answer the question.

RTC internal reference # 304887.

Talent Gateways - Candidate Smart Sign in

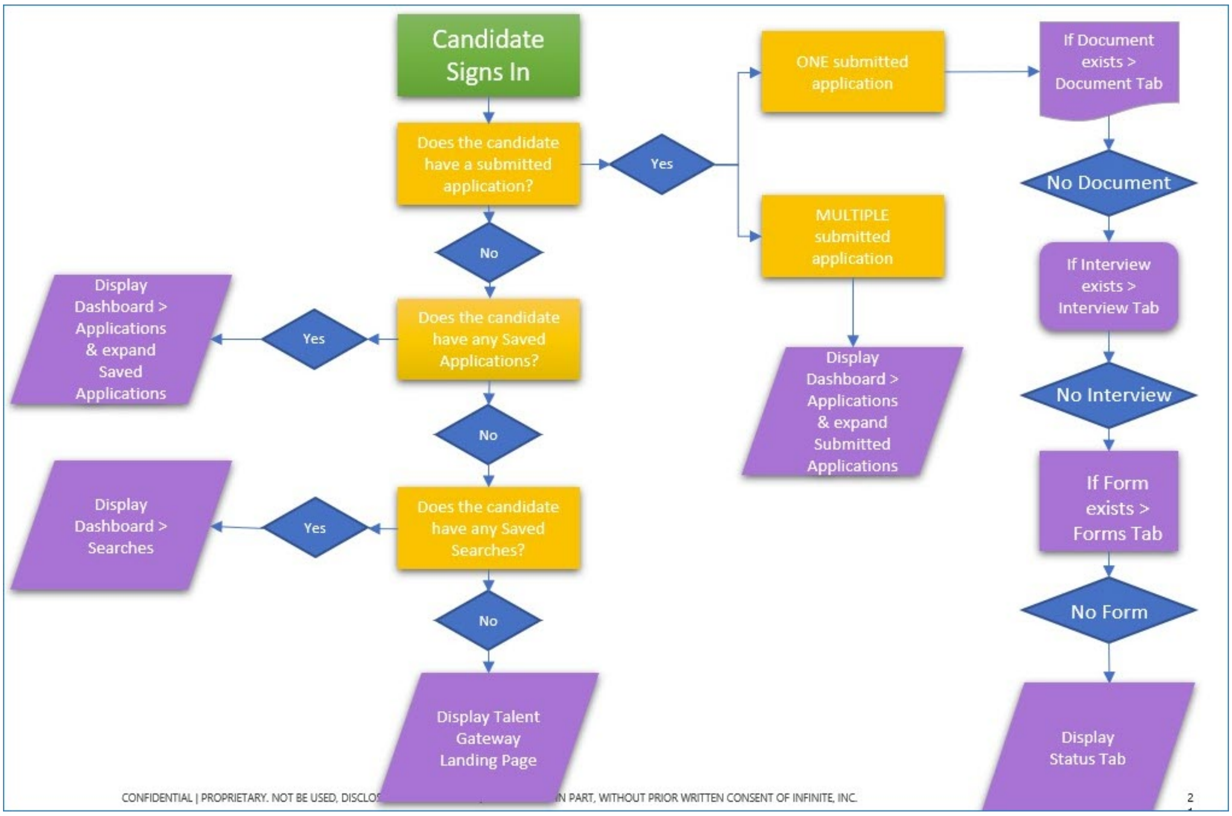
Previously, when candidates logged in to a Talent Gateway from the homepage, they landed on the Candidate zone's dashboard, and by default, the jobs tab within the dashboard. To improve candidate experience, starting this release, the Talent Gateways use a Smart Sign-in logic to land the candidate on the highest priority page of the Talent Gateway based on the application details or activity on the site.

The Smart Sign-in logic works as follows:

1. Does the candidate have a submitted application? If YES then: If YES, then,
   a. If **YES** AND only **one application** is submitted, the Application Details page for this submitted application is displayed. Within this application,
      i. If any Documents exist, open the Documents tab (note: this includes the doc sub-forms).
      ii. If no Documents are present but there are Interviews present, display the Interviews tab.
      iii. If there are no Documents present and there are no Interviews, display the Forms tab.
      iv. If there are no Documents, Interviews, or Forms, then display the Status tab.
   b. If **YES** AND **more than one application** is submitted, display the Dashboard > Applications and expand the Submitted Applications section.
   c. If there are no applications submitted, then the system checks the following options.
2. Does the candidate have any saved applications (and non of them are submitted)?
   a. If YES, display Dashboard > Applications and expand the Saved Applications section.
   b. If no, proceed to the following options.
3. Does the candidate have any saved jobs (and no applications)?
   a. If YES, display Dashboard > Jobs.
   b. If no, proceed to the following options.
4. Does the candidate have any saved searches (does not have any submitted or saved applications and does not have any saved jobs)?
   a. If YES, display Dashboard > Searches.
5. If the candidate has no dashboard details (no applications, no saved jobs, no saved searches), then display the Talent Gateway landing page.

This feature is applicable when candidates log in from the Talent Gateway landing page.

RTC internal reference # 304891.



Recruiter Experience - Field Help Text Display on Grids

Field help text can be added while editing field attributes of form fields in Workbench. Starting this release, if the Field help text is available for a form field, that text is displayed when users hover the mouse cursor over the grid header of that field. This feature is available for all candidate listing and req listing grids, including search result grids and home page grids.

RTC internal reference # 305632.

Data Insight Tool - Admin Transfer Ownership of Active Templates

In the current Data Insight Tool (DIT) functionality, if a BrassRing user leaves the organization or is on vacation, there is no provision to access their DIT templates and schedules. There is no way to change the ownership to another user other than to wait or reach out to the engineering team to take the action.

A new column **Template/Schedule count** is added to the User Roster Tab. This column contains the value **[Active Templates count]/ [Active Schedules count]** of each user listed in the ‘User Roster’ tab. The schedule count includes all the active schedules of both the public and private templates created by that specific user.

A new action button **Transfer Ownership** is added in each row in the ‘User Roster’ tab with an info tooltip next to the button. Upon mouse cursor hover, the message *Transfers Ownership of the active templates and active schedules of the selected user to another user* is displayed.

When the administrator selects a user with active schedules and selects the **Transfer Ownership** button, a list of up to 200 users with a similar role as the selected user is displayed. The administrator can search for a user by the user's first or last name and select the user. Only one user can be selected for the transfer of ownership from another user. Only one user's ownership can be transferred at a time.

After selecting a user, the administrator transfers the ownership of all the templates of the selected user.

NOTE

When transferring the templates, all the templates in ‘Public’,‘Default’ and ‘Received’ categories of the original owner are moved to respective ‘Public’,‘Default’ and ‘Received’ categories of recipient owner. The templates in custom categories of the original owner are transferred to the 'Default Category' of the recipient owner.

RTC internal reference # 296826

Classic Talent Gateways

Several years ago the Classic Talent Gateway functionality was retired and only Responsive Talent Gateways have since been supported.

During this release, as previously announced, all the classic Full and Global Talent Gateways are inactivated.

RTC internal reference # 305395.

Talent Gateways - Auto-Populate Contact Email Address

Starting this release, when a candidate creates a Talent Gateway profile, the email address the candidate provides as the login email is auto-populated in the contact email address field. This serves the dual purposes of improved candidate experience and enabling the two-factor authentication feature for the candidate.

RTC internal reference # 305989.

Talent Gateway Smart Token - Target Page

During the February release, a new smart token [TRACK_APPLICATION_STATUS] is introduced to be added in candidate reference emails. When candidates selected this link in the email, they launched the Talent Gateway landing page.

To improve candidate experience and avoid confusion, starting this release, when candidates select this link, they launch the Talent Gateway sign-in page. In this case, they can log in and directly track their job status.

RTC internal reference # 306181.

Forgot Password - Lockout Message

In the Forgot Password workflow, for any reason, if an account lockout occurs, and the candidate tries to use the Forgot password link again, the **Continue** button was not working. This is addressed in the current release, and now, when a candidate is already locked out, selecting Continue shows the relevant lockout error message.

RTC internal reference # 306342.

BrassRing Configurable Changes

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

Candidates - Privacy Policy Update Log

With the EU General Data Protection Regulations (EU GDPR) and other similar privacy laws in place, clients are required to keep their privacy policy up to date. Clients are also required to display the updated privacy policy to the candidates and take the candidates' consent to the updated privacy policy.

When a privacy policy is updated by clients, it is important to keep track of the version of the policy that the candidate has consented to, to make sure that the candidate is aware of the client's latest version of the privacy policy.

Starting this release updates are made in BrassRing Talent Gateways, configuration, and the recruiter experience to ensure that the candidates are displayed the latest version of the privacy policy and their consent to the latest policy is recorded.

Candidate Experience

Depending on the workbench setting for the privacy policy, **Placement of privacy policy**, if the setting is not configured to *Disable privacy policy (note: privacy policy/candidate consent is required per EU GDPR)*, the system checks for the latest version of the privacy policy to which the candidate provided consent.

If there is an existing policy to which the candidate already provided consent, then, the system verifies this policy with the latest policy that is available on the workbench setting. If there is any variation in the privacy policy text, the updated text present in the workbench setting is displayed to the candidate. When the candidate provides consent, then the latest policy version is saved to the candidate's record with a new ID.

If there is no change to the policy that is previously saved, and the current policy present in the workbench, then there is no display of the privacy policy upon the candidate's login as there is no change in the existing policy.

For Global Talent Gateways, the comparison is done for each locale, Talent Gateway, and each translation of "Privacy policy statement which asks consent". Each time there is a variation found, the updated policy is displayed to the candidate during the login workflow, and if the candidate provides consent, the system saves the new version with a new ID.

For the clients that use the privacy qualifying question, the candidate sees the latest/updated qualifying question, and if they either consent to the privacy policy or bypass the question, then they are logged in. The candidate may choose the option to bypass privacy policy, in which case the privacy statement is skipped and the candidate is brought to the next page. Alternatively, the candidate may choose the option to display a privacy policy, in which case, they see an updated privacy statement on the next page where they choose to accept or decline the updated privacy policy.

In both the regular privacy policy and the qualifying question version of the privacy policy, when the candidate accepts the privacy policy, the new version of the privacy policy is saved to the candidate's Talent Gateway profile.

When a candidate chooses the Decline link for updated privacy policy the candidate is taken to the "Non-consent" page that displays the non-consent text from the Workbench setting and immediately logs the candidate out of the Talent Gateway.

Recruiter Experience

For each submission by a candidate, a new section within the Gateway Questionnaire Response Form gives access to the latest privacy statement that the candidate most recently saw or gave consent to. Within the Gateway Questionnaire response form, a new section **Privacy Statement Details** is added. This section displays the date on which the candidate accepted the privacy policy. It also provides a link called View. Selecting view opens the complete privacy policy as displayed to the candidate. If the candidate bypasses the question, instead of the View link, the phrase *Bypassed via question* is displayed.

If the candidate has not submitted for a job yet, the latest privacy policy statement accepted by the candidate can be viewed in the following path:

Menu > Admin > Admin+ > Candidate Account Retrieval > [enter candidate info] > Get Account details

For the candidates that have bypassed the question, the date on which the bypass happened is captured.

> **NOTE**
> There will be no update to the existing candidates until the privacy statement is updated AND the candidate logs into the respective Talent Gateway and is thereby prompted to accept the new policy. For existing candidates, the privacy policy of the candidate that they have already accepted is not currently available.

RTC internal reference # 303101, 303102, 303103, 303104, 303526, 304670.

Data Insight Tool - Scheduling and Communication Enhancements

The Data Insight Tool runs a huge number of templates every day to provide clients with the reporting data that they need. For the optimal usage of resources and smooth delivery of reports, the Data Insight template scheduling and communication is enhanced. To ensure a periodic review of the templates and scheduling of the templates, a new default expiration frequency is introduced in Data Insight template scheduling.

End date selection

All templates that are scheduled with a frequency of report delivery must now have an expiration date. A user cannot schedule a report without selecting an end date.

This enhancement applies to schedules that are newly created and any schedules that are edited after the release of this feature. A migration activity is planned to set an end date for the existing schedules that do not have a user-defined end date. Templates that were previously scheduled without an expiration date are going to be set up with an expiration date.

Any ACTIVE scheduled templates/reports that do NOT have an END (expiration) date will be migrated and a future expiration date will be applied. The logic that will be used is as follows:

1. Infinite will consider the schedule's start date OR last edited date, whichever is greater to determine the EXPIRATION date.
2. We will add six months repeatedly to this date until the date becomes greater than 6 months and less than 12 months from TODAY (date when the migration is executed).
3. This logic applies to all frequency types, i.e., Daily, Weekly, Bi-Weekly, Semi-Monthly, Monthly, Quarterly, X Days
4. Sample Scenarios:
    a. If Migration date is 31 Mar 2022 (EXPIRATION DATE must be BETWEEN 30 Sep 2022 (6 months) and 31 Mar 2023 (12 months)).
        i. If Last Edited = 1 Feb 2019, then the new END date will be set to 1 Feb 2023.
        ii. If Start Date = 25 Feb 2022, then new END date will be set to 25 Feb 2023.
        iii. If Start Date = 1 Oct 2000, then new END date will be set to 1 Oct 2022.
        iv. If Start Date = 1 Sep 2022 (future start date scenario), then new END date will be set to 1 Mar 2023 (because adding next 6 months would exceed 12 months limit).
        v. If Start Date = 1 Oct 2022 (future start date scenario), then new END date will be set to 31 Mar 2023 (because adding six months would exceed the 12 months limit and leaving as is would be Equal to the Start Date, hence setting the new END date to the max limit.)

5. The migration will occur in Staging environment 15 days after the Production release, and in Production environment 30 days after the Production release, so that clients have time to edit the schedules and set specific expiration date of their choice. Migration activity would span up to a week to complete since this logic is time consuming to run across all active scheduled reports.

Expiry Date Column

A new column **Expiry Date** is added to the **My Scheduled Jobs** table. This column displays the expiry date of the user's job that is approaching expiry. The table can be sorted by the expiry date. Starting this release, the **Status** column displays the status of expired jobs as **Expired** in red. This status is displayed for 14 days from the date of expiry. The renewal window for a scheduled job is opened 14 days before the date of expiry and is open up to 14 days after the expiry. Users can renew the schedule of the job during this renewal window using the new button **Renew Schedule** added next to **Cancel Schedule**.

This button is enabled for a scheduled job only during the 28 days of the renewal window and is disabled during all other time. When users select **Renew Schedule**, an alert message is displayed requesting confirmation. If the user confirms by selecting Yes, the schedule is renewed based on the criteria already mentioned.

Schedule expiry communication

The owners of the respective templates receive notification emails based on the configuration that is available in the Workbench client settings. Clients can configure the frequency at which they might receive the schedule expiry notifications. The client setting **DIT schedule expiration notification frequency** is available with the following frequencies of notification:

- 14 days and one day (default).
- Seven days and one day.
- One day.
- No notification.

When users receive a notification, they can verify and decide to let the scheduled job expire or validate and renew. A user that has multiple scheduled jobs that expire on the same day receives a single email with information about all the jobs.

RTC internal reference # 257081.

BrassRing Workbench Changes

The Workbench changes for the current release are listed here.

Talent Gateway Setting - Control Smart Sign-in

The Talent Gateway smart sign-in is a new feature that is provided during the current release.

There are some Talent Gateways of clients that use advanced CSS to hide some candidate details. This advanced CSS would not allow the featured pages to be displayed properly and that might result in confusion for candidates. In order to provide clients with the control to enable or disable this feature, a new setting is added in the Responsive Layout section of Talent Gateway configuration.

Path: **Tools > Talent Gateways > Edit Responsive Layout > General > User Sign-in and Session Handling**

New setting: **Disable smart sign-in from landing page; always bring candidates to Dashboard > Jobs on sign-in**. This is a check box and by default, this setting is off for all Talent Gateways of all the clients.

When the check box is checked, and the setting is On, upon signing in, the candidate is taken to Dashboard > Jobs on the Talent Gateway.

RTC internal reference # 306352, 306397.

Lead Manager March'22 Release

There following are the new features delivered during this release for Lead Manager.

Lead Manager - Landing Page Workflow Enhancement

When a lead is created by a Lead Manager user, they provide the information in all fields based on their available resources. Upon engaging with the lead, the user uploads a resume of the lead into the system. However, sometimes, the upload is resulting in overwriting the lead information in the Standard fields with blank values. The information in the custom fields is retained.

It was observed that when parsing a resume, the system overwrites all the values of the standard fields in the lead's profile with the values from the resume. This includes the values that are not available in the resume. This results in overwriting existing information in standard fields with blanks on the lead's profile.

Starting this release, the system verifies and retains the data in the fields where the uploaded/parsed resume does not supply any information. Lead profile updates are made based on the following business rules.

For example, the lead profile information has the lead's LinkedIn URL. This is not a standard field. When the resume is uploaded, and the resume does not have the lead's LinkedIn URL, then during parsing, the LinkedIn URL is being overwritten with a blank value.

The following logic is used going forward:

1. If the Lead profile has data in Education and Experience sections and the uploaded resume does not have any data for those sections, then the existing data is retained on the Lead Profile.
2. If the Lead profile has data in Education and Experience sections and the uploaded resume also has data for Education and Experience sections the newly uploaded data from the resume is updated on the Lead Profile.
3. The Address fields (Address Line1, Address Line2, State, City, Country, ZipCode) are considered as a single entity. Therefore, if at least one of these fields has data while we are saving the lead, then the new address is updated with the same field in the Lead Profile Address.

RTC internal reference # 284319, 284342.

Lead Manager - Resume Parsing Text Update

Based on the changes made to the parsing workflow, the text on the parsing page is updated as following:

Résumé/CV Parsing You are about to replace lead profile information with the information in this Résumé/CV. Would you like to go ahead and use this résumé/CV to populate the lead profile?

RTC internal reference # 306344.

Compare Leads - Title Update

The Compare Leads window is used for comparing the lead information history of the same lead. However, the title of the window could be confused to understand that two different leads are being compared.

Starting this release the window title is updated to **Compare Lead History**

RTC internal reference # 306318.

Onboard March'22 Release

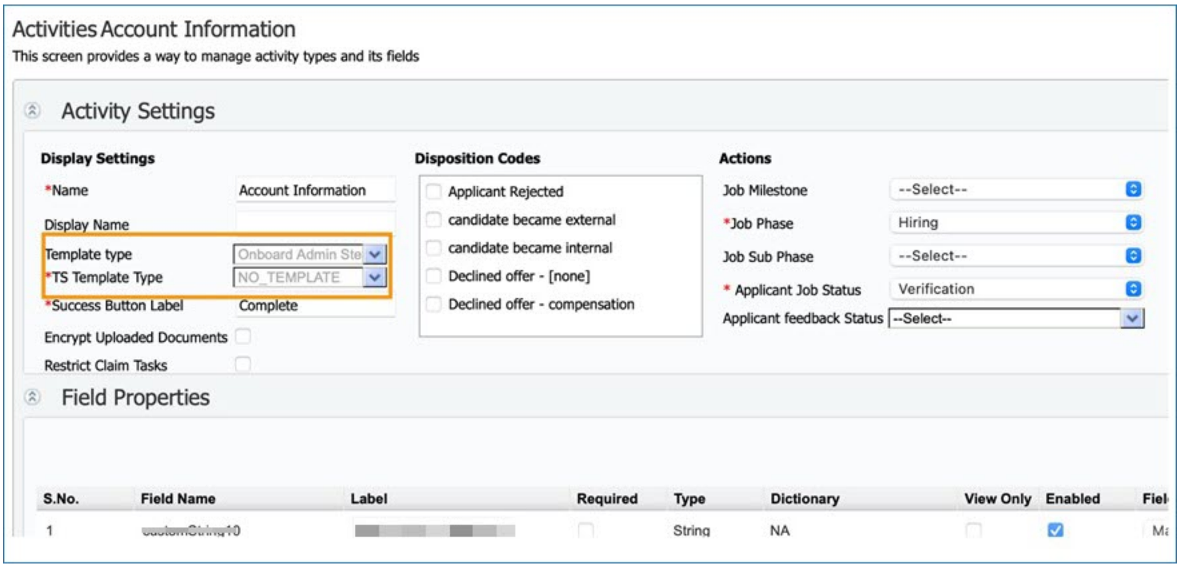
Onboard new features for the March release are listed here.

Onboard Visible Changes

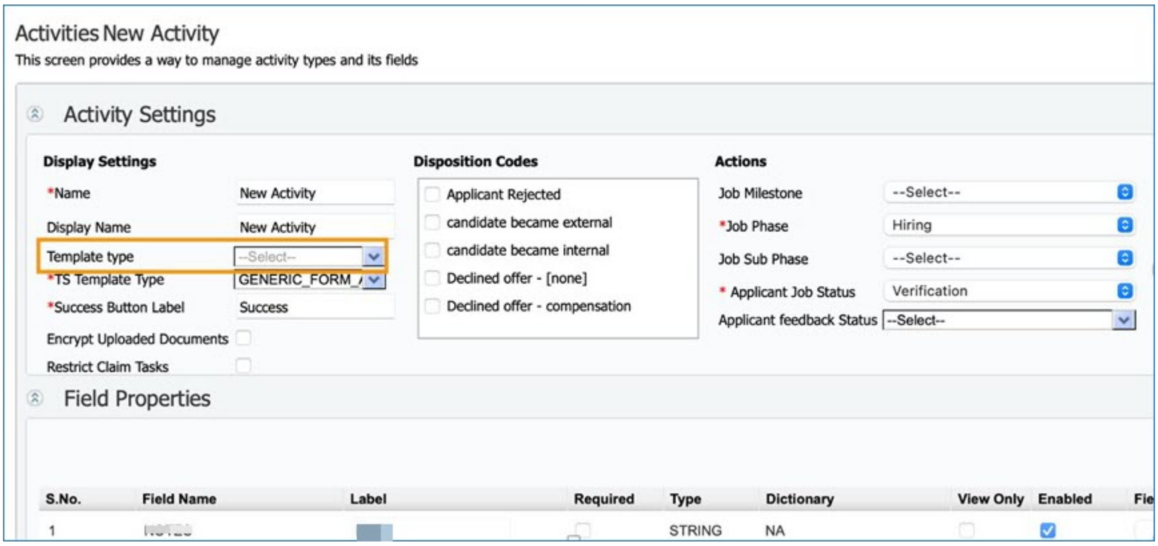
Onboard new features for the current release are listed here.

Manage Activities - Restrict Users from Changing Activity Type

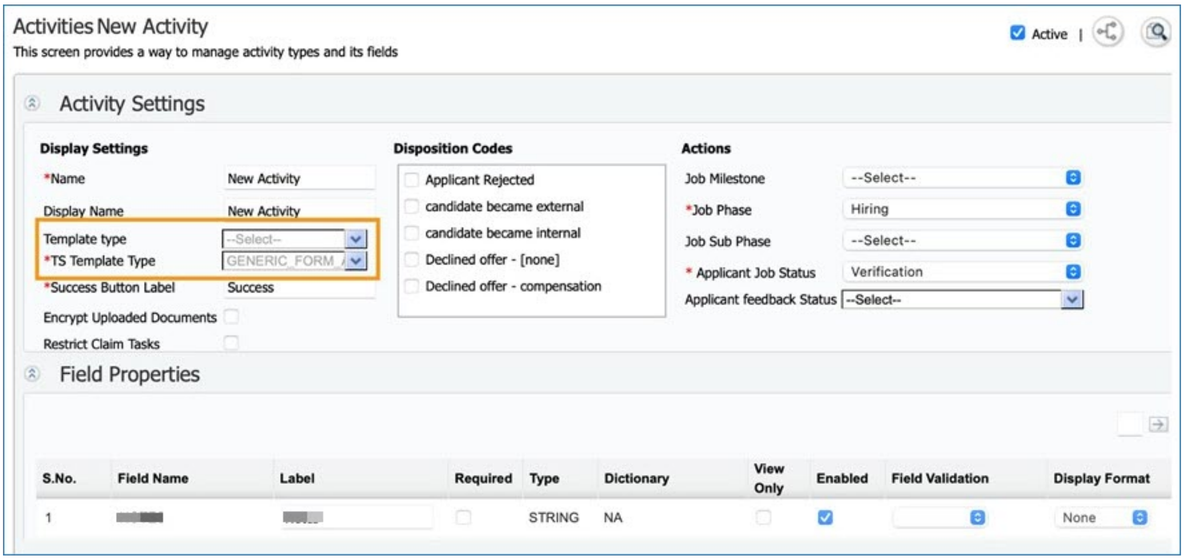
When a specific Activity is in use, users must be restricted from changing Template type, and the TS Template type fields. These fields are made unavailable to ensure that the users do not changes the type values.



In the Create New Activity workflow, the field Template Type is disable by default. Users can change the values in the field TS Template Type until the selected template type is not in use.



When an Activity is tied up to a workflow, both the template type and TS template type fields are unavailable for users to update.



RTC internal reference # 303408.

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. Onboard Fixed Defects

RTC Defect Number	Defect Description
306575	Template type value should be 'Select' instead of a value in the Create Activity screen
306030	Misfire should not change timings for Daily every nth day case
305577	00061890 - Onboard Start did not get autocomplete
306123	00072680 -- Add new hire Country field type ahead