IBM Kenexa BrassRing on Cloud

IBM Kenexa BrassRing on Cloud Release Notes

January 17, 2018

Note
Before you use this information and the product it supports, read the information in "Safety and environmental notices" on page x and "Notices" on page x.

This edition applies to IBM Kenexa BrassRing on Cloud Release 18.01.08 and to all subsequent releases and modifications until otherwise indicated in new editions.

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Contents

Introduction

This document presents changes, both visible and configurable, included in the January 11, 2018 release of IBM Kenexa® BrassRing® on Cloud and IBM Kenexa Lead Manager.

The objectives of this document are to:

- Present feature enhancements and usability and performance improvements that are introduced in this release.
- Document changes in system requirements, if applicable.

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.

New Knowledge Center

The existing IBM Talent Management Solutions and Watson Talent Knowledge Center is now part of the IBM Knowledge Center (KC).

It contains all IBM Kenexa Talent Management Solutions (TMS) & Watson Talent user documentation and training materials (such as eLearning). Users can easily navigate within a document as well as link to other documents and training resources.

With the December 2017 release, all documentation Help links from the Talent Suite will launch the new KC.

Note: Temporarily, in order to view the IBM TMS KC, you must log in with an IBM ID that is authorized to access it.

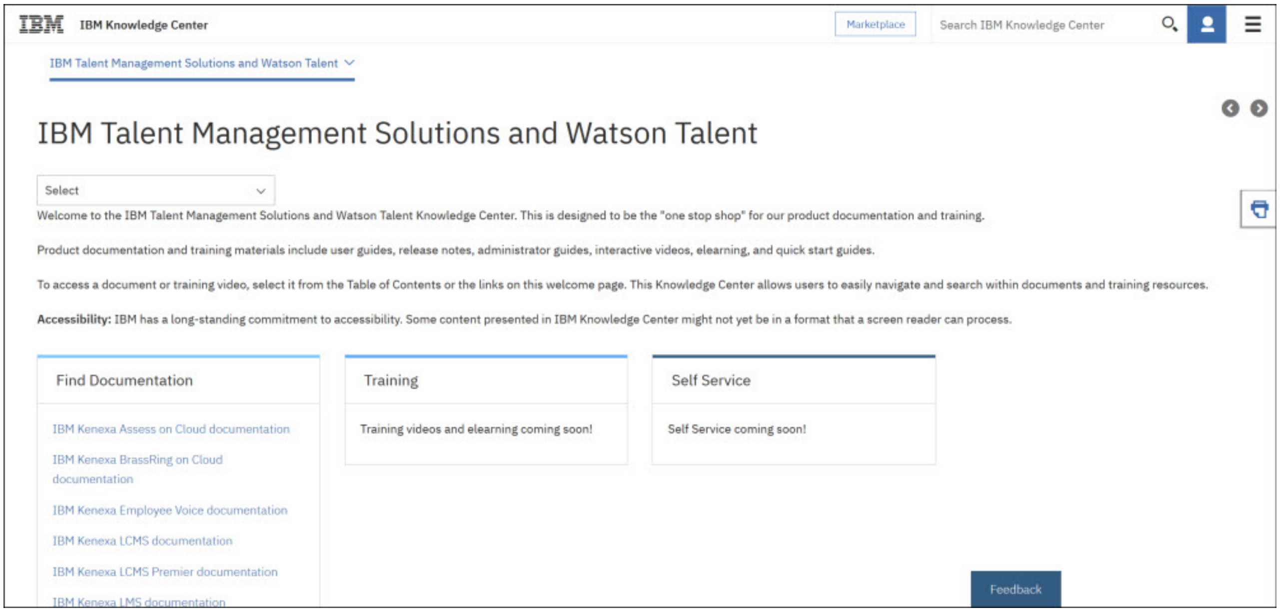
1. Obtain an IBM ID by selecting this link https://www.ibm.com/account/us-en/signup/register.html and enter all required information on the sign up page.
2. Once you have an IBM ID, sign in by selecting the people  icon.

For more information about new IBM TMS KC and detailed instructions for obtaining and IBM ID and signing in to the IBM TMS KC, refer to the following sections.

Benefits of the New Knowledge Center

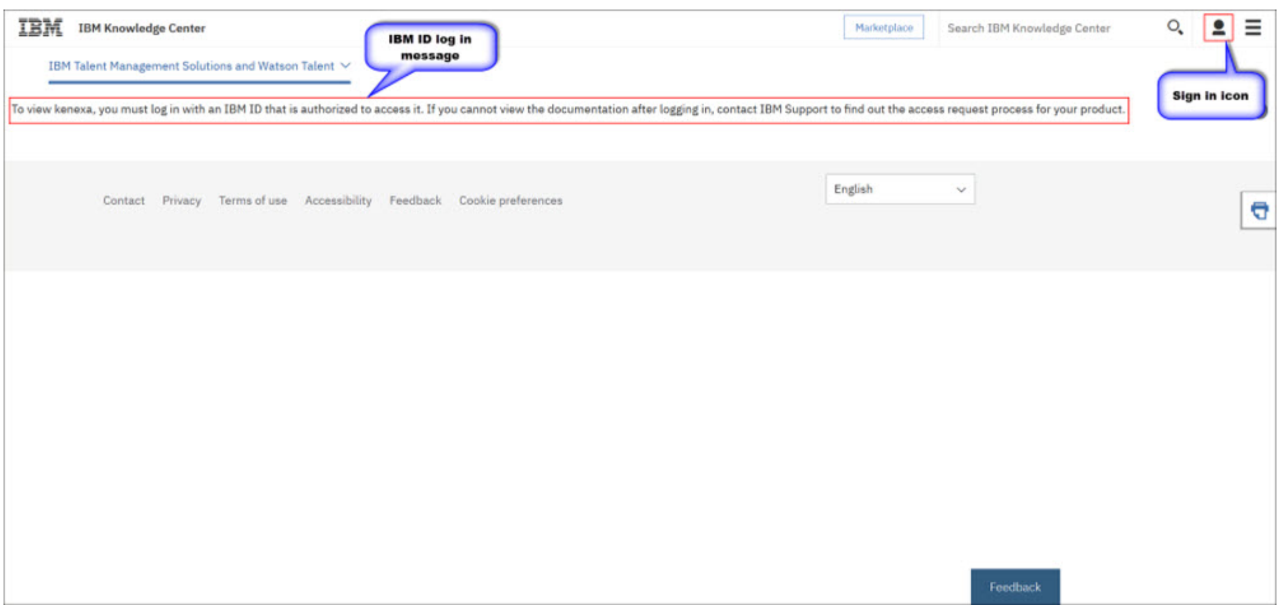
- State-of-the-art features allow for a better user experience and a more responsive platform.
- Content is updated regularly to always be current.
- All content is in one location for documentation and training.
- Better search navigation.
- Usage metrics allow IBM to better monitor how documentation and training are used.

Access the new IBM TMS KC URL to explore and enjoy. IBM Talent Management Solutions and Watson Talent Knowledge Center



Important: With log in to the IBM Talent Management Solutions and Watson Talent site on the IBM KC, you may encounter the following log in message.

```
To view kenexa, you must log in with an IBM ID that is authorized to access it. If you cannot
view the documentation after logging in, contact IBM Support to find out the access request
process for your product.
```



If this occurs, please use the following instructions to set up an IBM ID and sign in to the TMS IBM KC.

Create an IBM ID Instructions

To create an IBM ID,

1. Access the **Sign up to IBMid** page by selecting the following link: https://www.ibm.com/account/us-en/signup/register.html

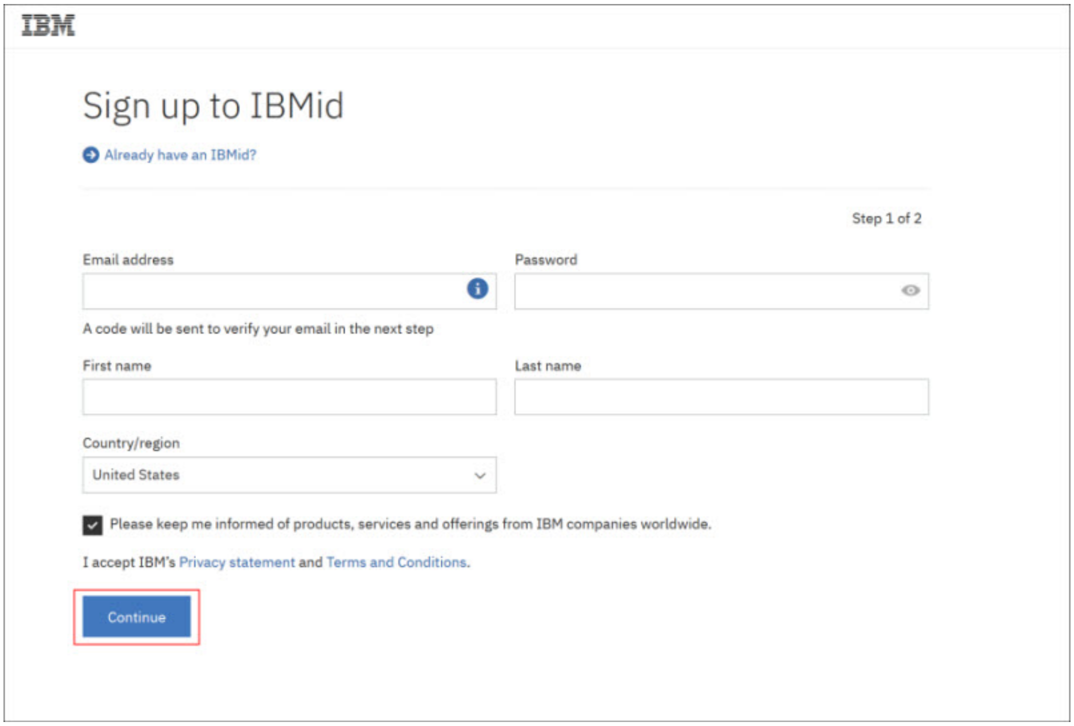


Figure 1. Sign up to IBMid page

Note:

If presented with the **Sign in to IBMid** page,

a. Select **Use a different IBMid or email**.

b. On the next page, select **Need an IBMid?**. That will bring you to the **Sign up to IBMid** page.

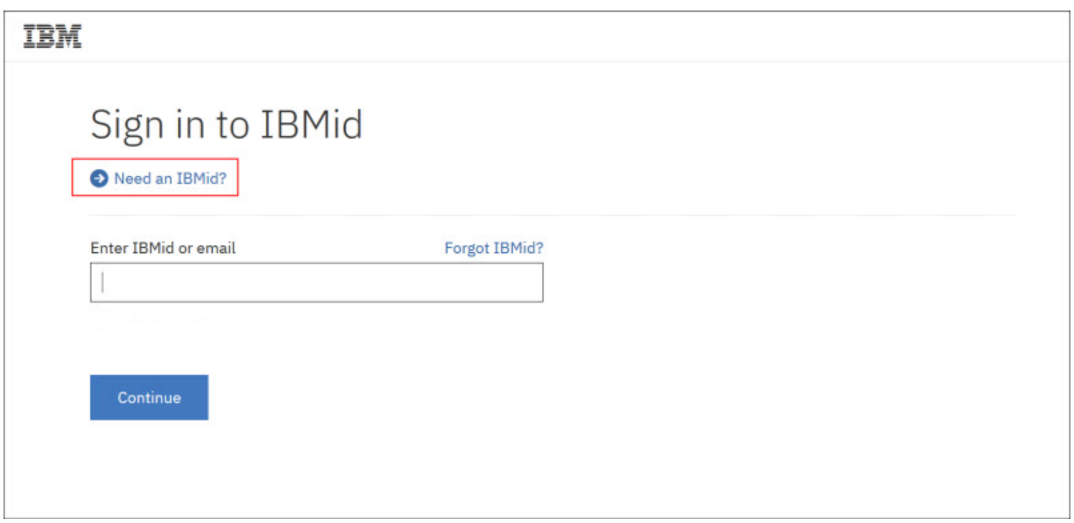


Figure 2. Sign in to IBMid page

2. Enter the following required credentials.
   - **Email address** (This email address is used as your IBMid.)
   - **Password**
   - **First name**

- **Last name**
- **Country/region**

3. Select **Continue** to accept the IBM Privacy statement and Terms and Conditions and to continue with registration. (A confirmation email is sent to the email address that you entered.)
4. Retrieve the confirmation code from the email that is sent to the email account that you specified for your IBMid.
5. Enter the confirmation code and select **Sign up for an IBMid** to complete your registration. Your IBM profile page opens. (This profile page provides an overview of all products and services that are associated with your IBMid account, notifications, events, and more.)

You can now use your IBMid to sign in to the IBM Talent Management Solutions and Watson Talent IBM Knowledge Center and navigate to your product documentation and training.

User Sign in Instructions

To sign in with your IBM ID,

1. Select the people icon on the log in message page.
2. Select Sign in.

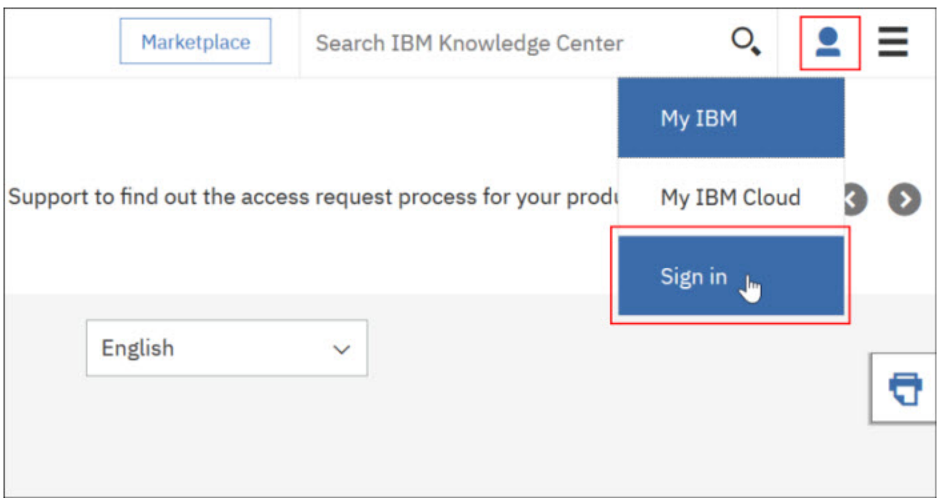


Figure 3. Select people icon to sign in

3. Enter your email address you are using for your IBM ID and password on the following page(s).

End of Support for Classic Talent Gateway

This communication is a follow up to multiple communications sent in 2017 to remind you that IBM Kenexa sunset support of **IBM Kenexa BrassRing on Cloud Classic Talent Gateways and the classic apply process** on **December 31st, 2017**. Classic Talent Gateways and the classic apply process, while not disabled, are no longer supported.

Action May Be Required: If you haven't already, we advise transitioning off Classic Talent Gateways and the classic apply process **as soon as possible**. If your organization opted to stay on classic, this note is a reminder that these talent gateways and classic apply processes are no longer supported by IBM, meaning that although IBM did not shut off Classic Talent Gateways, IBM is no longer working on bug fixes specific to Classic and no longer ensuring accessibility standards on anything other than the responsive Talent Gateways and Responsive Apply process. All new functionality will only be available in the responsive experience.

Want to get started on the IBM Responsive Apply Talent Gateways but don't know where to start? Watch our Responsive Apply Overview and Configuration Webinars on the Support Portal to understand who should be involved, an example project timeline, configuration instructions, and much more! You can also reach out to your Kenexa Representative with any questions or concerns.

Visible Changes

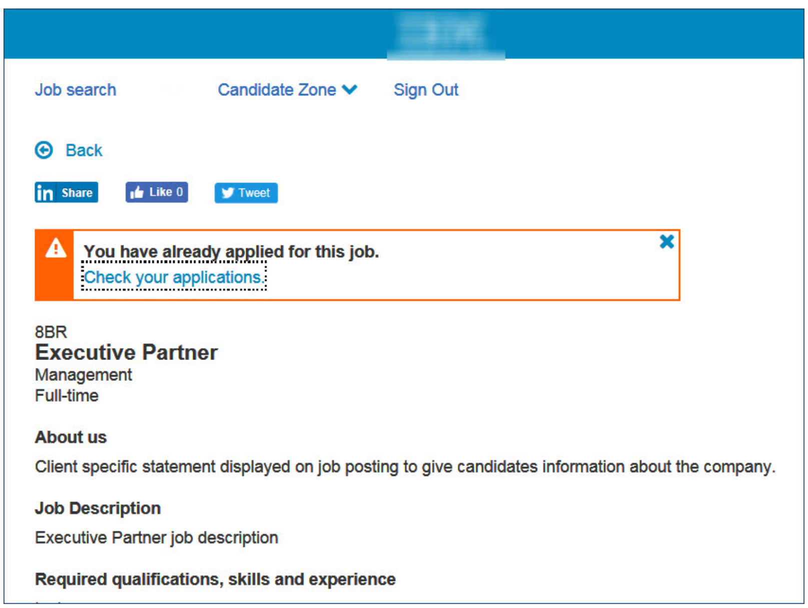
The current release of IBM Kenexa BrassRing on Cloud includes the following visible changes for BrassRing and IBM Kenexa Lead Manager

Responsive Apply

The current release includes the following visible changes for Responsive Apply. Visible changes alter the appearance or performance of the product without requiring any configuration. The changes are immediately visible or available to users.

Responsive Talent Gateways - Warning Messages

To improve candidate experience and also to comply with accessibility and candidate experience guidelines, enhanced warning messages in the responsive Talent Gateways now display. Warning messages in responsive Talent Gateways are system notifications that display when an action is disallowed due to system (or site) limitation. These messages are not due to a recent candidate mistake and thus not an error. For example, a warning message displays when candidate accesses a job that they already applied to.



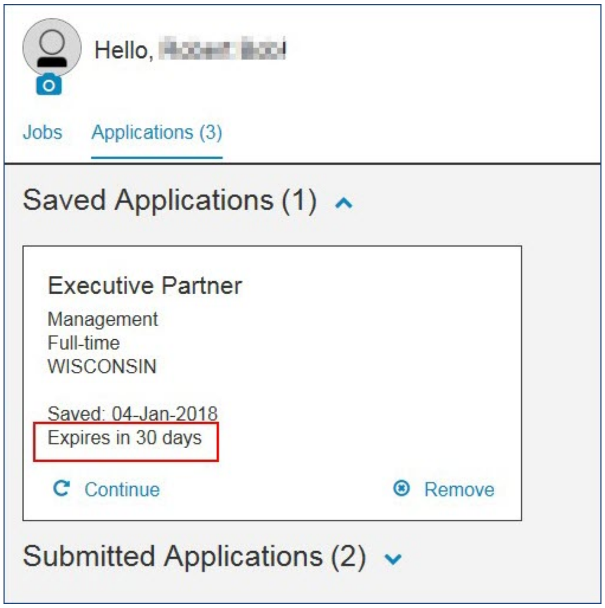
Following are the warning message enhancements introduced in this release:

- Warning area under each applicable section shows an icon and a warning message.
- The Warning message box of a Yellow background color and white text with exclamation icon is replaced by an Orange box with transparent background.
- The new warning message box has an exclamation icon enclosed in a triangle.
- Hyperlinks provided in the warning messages are underlined only during mouse hover.
- The background color and the text color of the warning message box are same as the branding colors of the responsive Talent Gateway.
- The icons in the warning message box cannot be clicked or selected.

RTC Internal Reference # 86057.

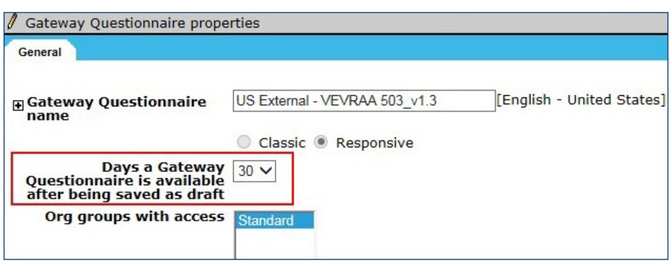
Candidate Zone - Saved Draft Reminders

Starting this release, a new feature in the Responsive Talent Gateways to reminds candidates about job submissions they may have saved as draft but not yet completed. The reminders are sent and displayed three days before the expiry of the saved draft, and also take into consideration the job expiry date. The number of days the candidate has to complete the application draft is shown on the Saved Applications page of the candidate's Talent Gateway profile.



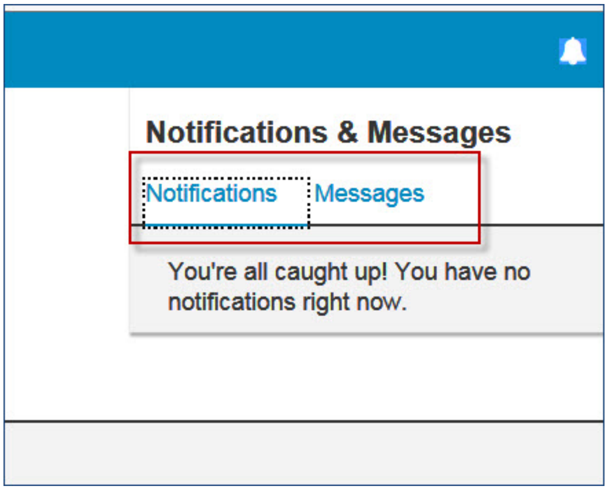
The number of days the candidate has to complete the saved application is determined based on the Gateway Questionnaire properties setting **Days a Gateway Questionnaire is available after being saved as draft** and **the job expiry date**.

For example, if the job is due to expire in 5 days but the GQ/application is set to expire in 30 days, the system is smart enough to know that the draft won't be available after 5 days. This means that the system will send the reminder 3 days before the job expires, and 28 days before the GQ/application would normally expire, if the job posting weren't expiring sooner.



Candidates receive reminders in two ways.

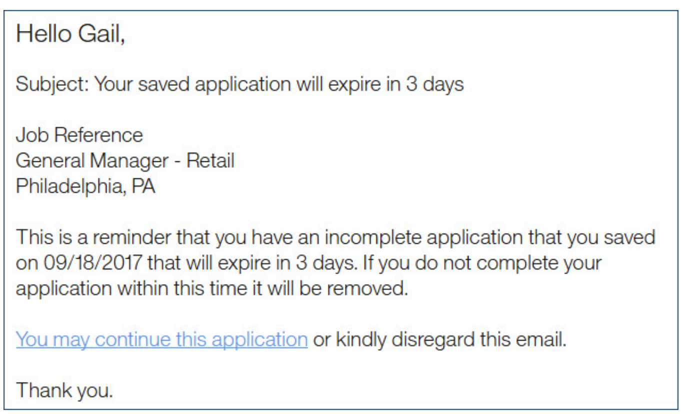
(1) The Message Archive section of the Candidate zone now includes notifications to remind candidates about the saved drafts in their profile. The bell icon displays a number that indicates the total number of notifications. This includes the notifications about communications and the saved draft reminder notifications. Each time a candidate logs in to their profile and accesses the candidate zone, the latest number of notifications displays on the bell icon. When candidates select the bell icon, two different tabs display. One of the tabs is for Messages/communications and the **Notifications** tab is for saved draft reminder notifications.



By default, the tab that was opened by the candidate during their previous login displays. If the unopened tab has notifications to display, a dot displayz on the tab which indicates that there are notifications for review. The dot is removed when candidates access the tab. The Notifications tab displays cards for the saved draft applications.

(2) Reminder emails are sent to candidates about the applications that are remaining in draft mode. The email contains a link to continue the saved draft application. Candidates are required to log in to their profile to complete the application when they select this link.

The reminder message is localized (translated) as per the locale of GQ saved as draft not necessarily the Global TG default locale.


Hello Gail,

Subject: Your saved application will expire in 3 days

Job Reference
General Manager - Retail
Philadelphia, PA

This is a reminder that you have an incomplete application that you saved on 09/18/2017 that will expire in 3 days. If you do not complete your application within this time it will be removed.

You may continue this application or kindly disregard this email.

Thank you.

Note:

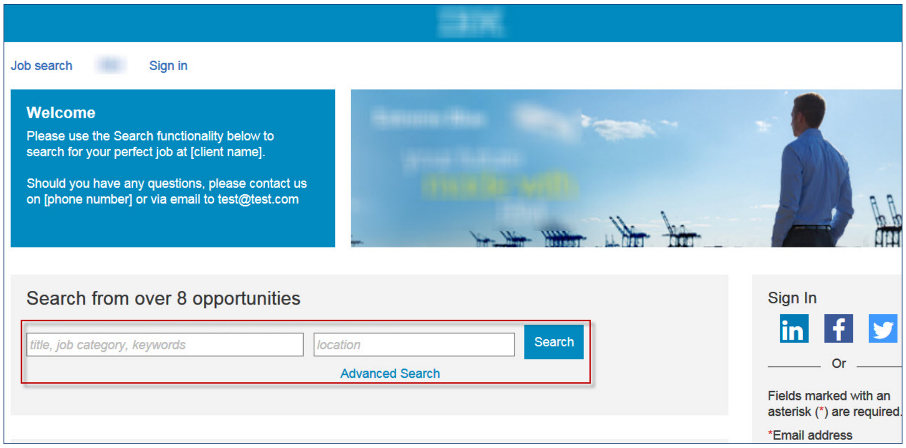
- This is a visible change and therefore neither the number of days used to determine when the reminder is sent (3) nor the reminder text is configurable at this time.
- Candidates that use the save as draft feature through the Responsive Talent Gateways are the target audience, but due to system functionality candidates that use the save as draft option within Classic Gateway Questionnaires or Classic non-Gateway Questionnaires work flows also get the reminder emails.
- The Bell icon displays only if the Candidate Zone is enabled for the Responsive Talent Gateway

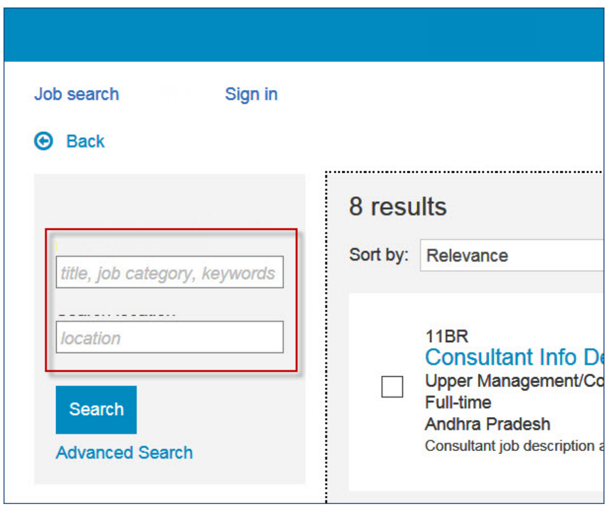
RTC Internal Reference # 91015

Responsive Talent Gateways - Home screen

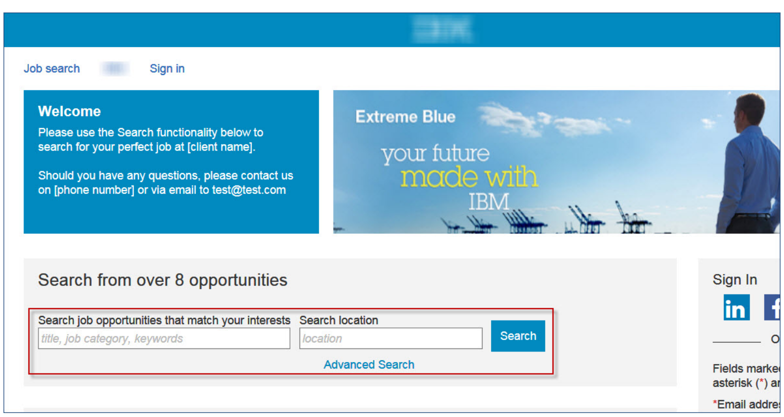
The Job Search (keywords) and the Location fields in the responsive Talent Gateways did not display field labels. To improve the candidate experience, field labels are added to these fields on both the home screen and the search results screen. The new field labels **Search job opportunities that match your interests** and **Search location** are added to the respective fields starting this release.

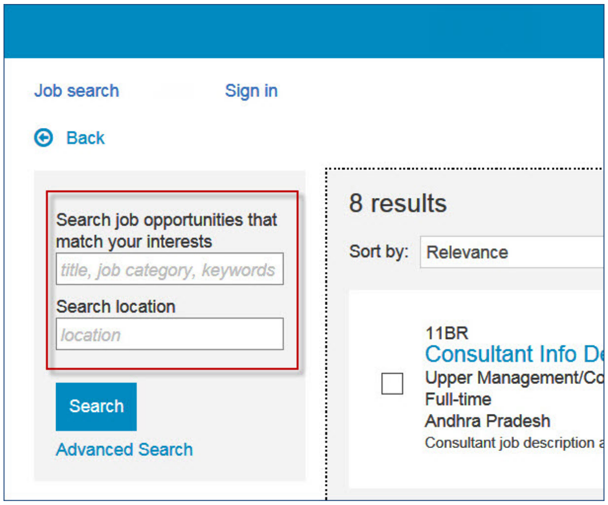
Before this change:





After this change:





RTC Internal Reference # 25156.

Gateway Questionnaire - Space Between Questions and Answers

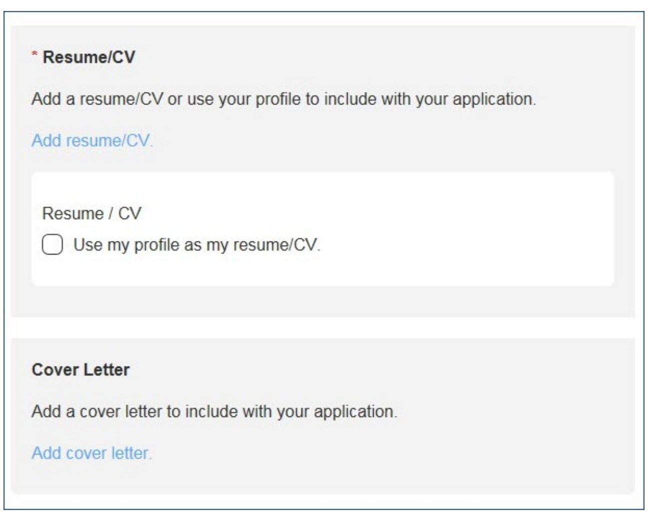
In the responsive Talent Gateway Questionnaire's review page, there is additional space that displays between questions and answers. The pencil icon was not in alignment with the page title of each of the sections. These inconsistencies are addressed in this release. Appropriate space is now displayed between questions and answers. Similarly, the pencil icon is now aligned with the page titles of the sections in the review page of Gateway Questionnaire.

RTC Internal Reference # 39791.

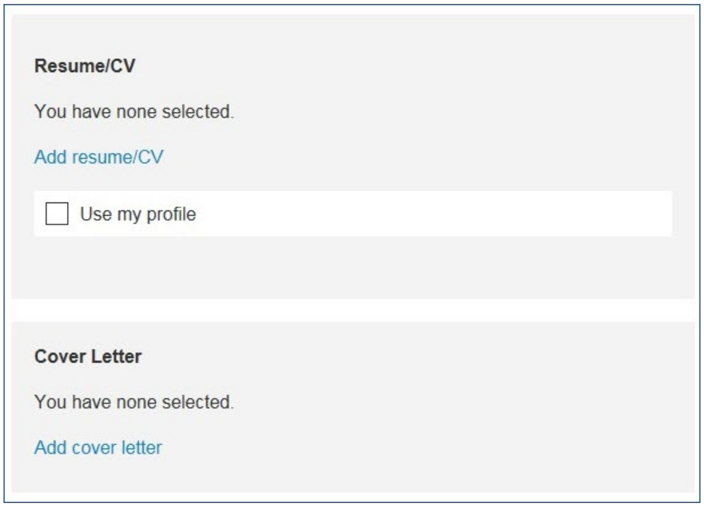
Responsive Talent Gateway - Concise Resume/CV Section

The Resume/CV section and the Cover letter section of the Responsive Talent Gateways are now enhanced for an improved candidate experience. These sections are now concise and easy to read and at the same time provide all the information required.

Before this change:



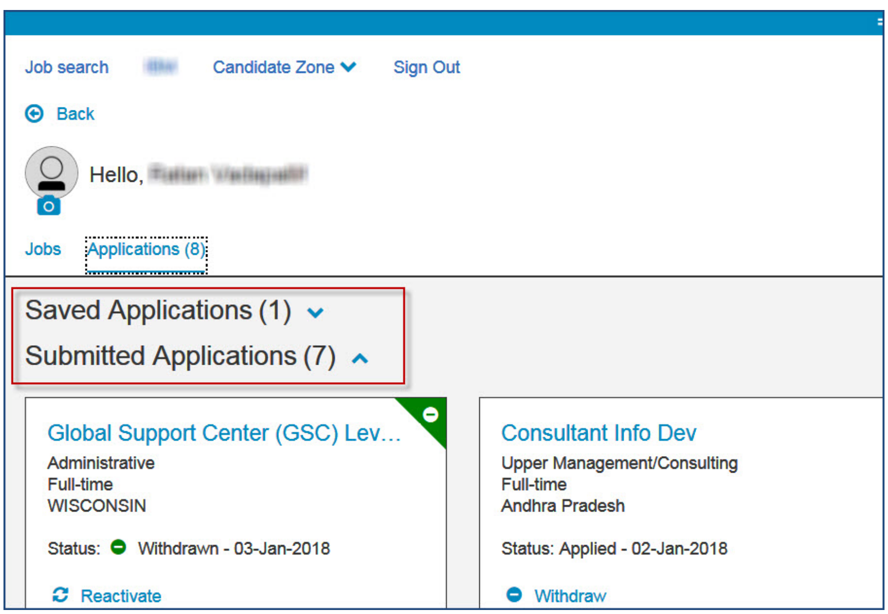
After this change:



RTC Internal Reference # 51121

Candidate Dashboard - Saved and Submitted Applications

The Saved application section and the Submitted application section now display as enhanced drop-down sections in the Dashboard of the Candidate Zone. When a candidate logs in to their profile for the first time and accesses the Candidate Zone's dashboard, these sections are found to be closed. If the candidate accesses one of these sections, the system now remembers whether the section was open or closed before the candidate browses to a different part of the Candidate Zone. Therefore, when the candidate returns to the dashboard, a section that was left open remains open and a closed section remains closed.

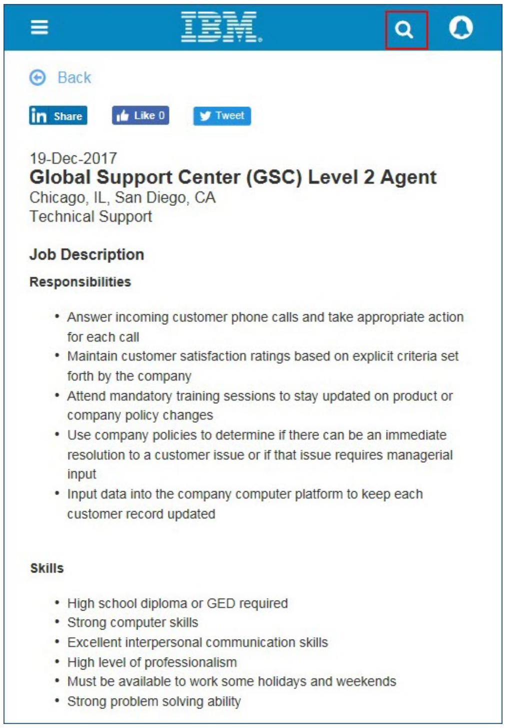


RTC Internal Reference # 74908.

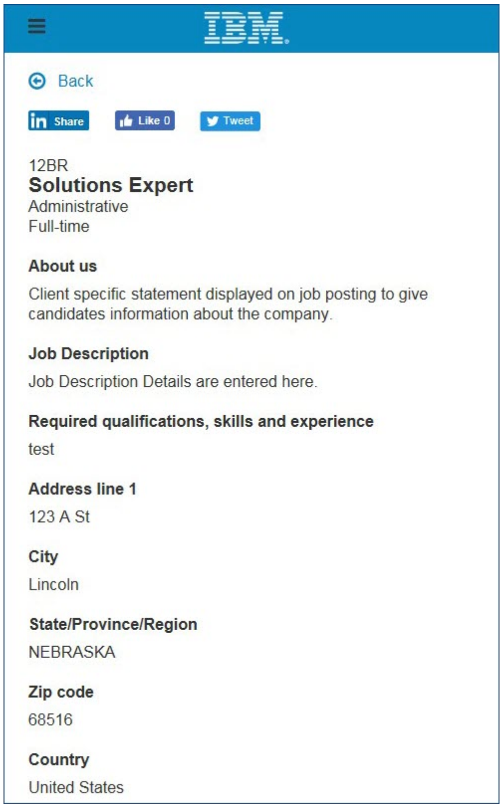
Responsive Talent Gateway - Search Icon

Before this release, the search icon (magnifying glass image) displayed on the Responsive Talent Gateway's job details and search results page next to the bell icon when candidates viewed the gateway in a mobile window size. In compliance with candidate experience guidelines, this icon is removed from the job details page. The icon has also been removed from the search results page and to make sure that there is no user experience gap, links to search for the candidates have been placed at appropriate places on the Talent Gateway so that the candidates do not have to go back to the home page if they must perform a new search.

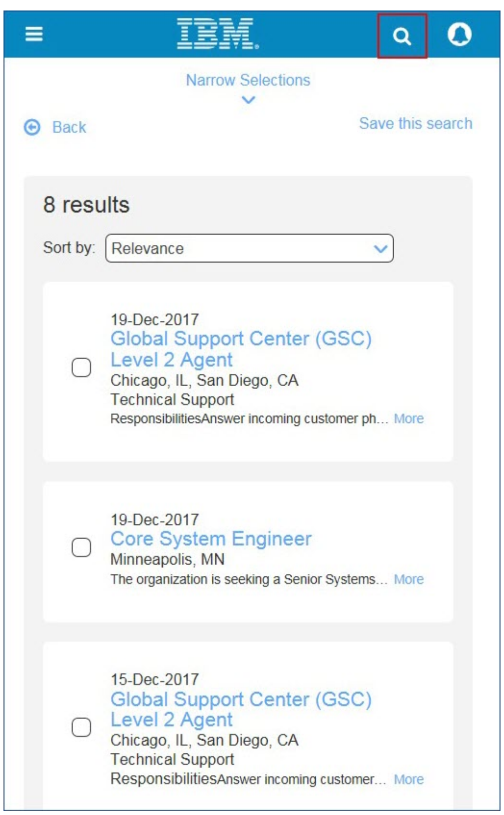
Job Details page before this release:



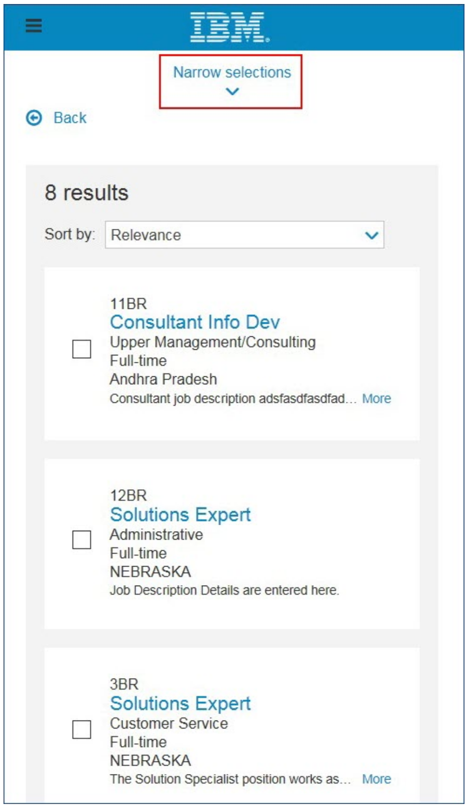
Job Details page after this release:

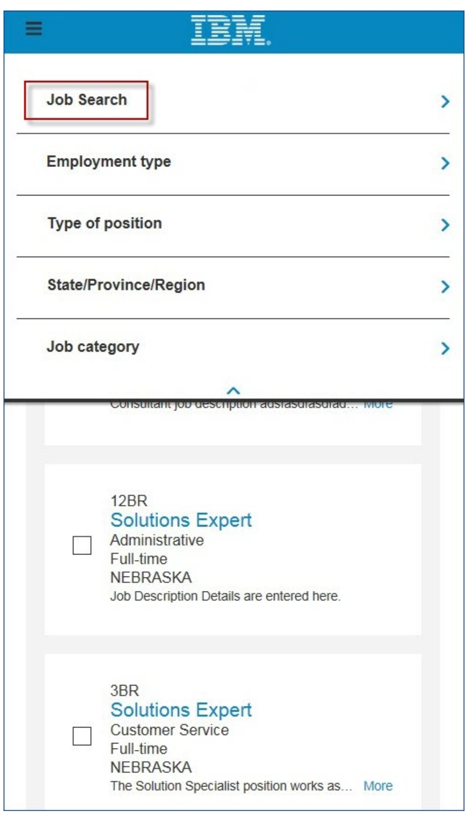


Search Results page Before this Release:



Search Results page after this Release:



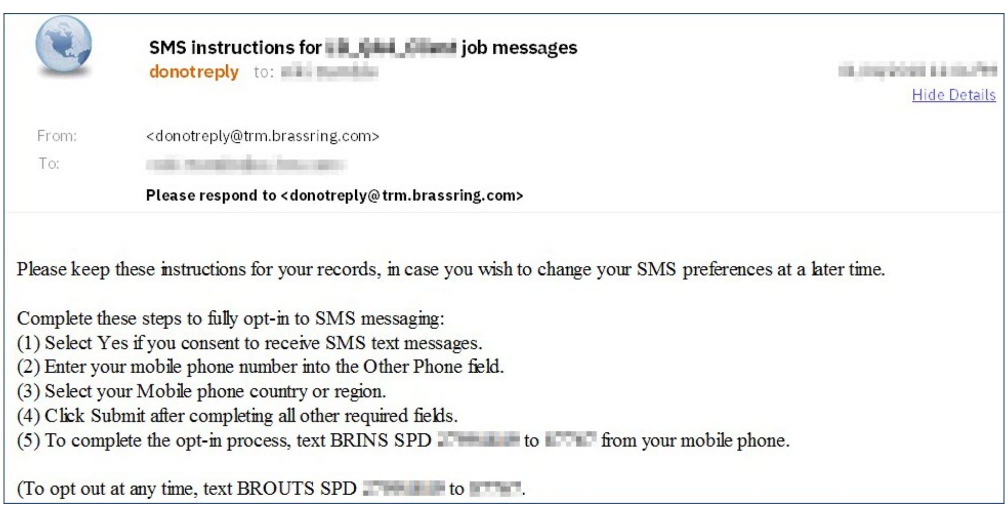


RTC Internal Reference # 87427

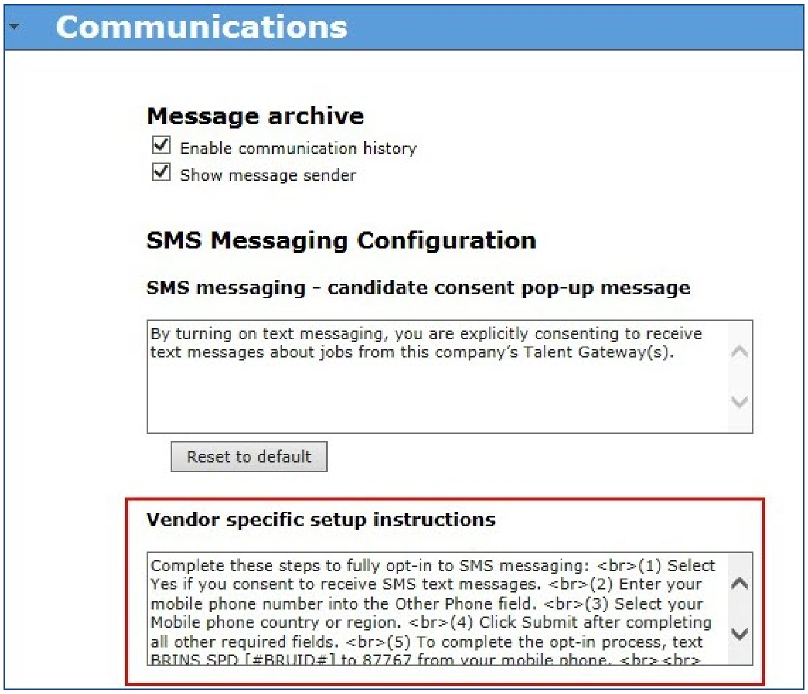
Communications - Responsive Talent Gateway SMS Opt-in Email

Prior to this release, if your organization was using the SMS (Short Messaging Service) functionality with Responsive Talent Gateways an Opt-in email was not sent to the candidate as the Classic Talent Gateway did. With this release, each time a candidate chooses to opt in to receive SMS (Short Messaging Service) messages on the account settings page of their profile or from within the application process, an email is sent to the candidate to confirm that they opted to receive SMS regarding jobs.

This email can also contain information on how can they opt out if they no longer want to receive SMS text messages in the future. An example of this email can be found below.



Standard verbiage is included at the top of this email. This text reads **Please keep these instructions for your records, in case you wish to change your SMS preferences at a later time.** The verbiage following the standard verbiage is configurable in Workbench. **Tools** > **Talent Gateways** > **Talent Gateway administration** > **Responsive Layout** > **Communications** > **Vendor specific setup instructions**



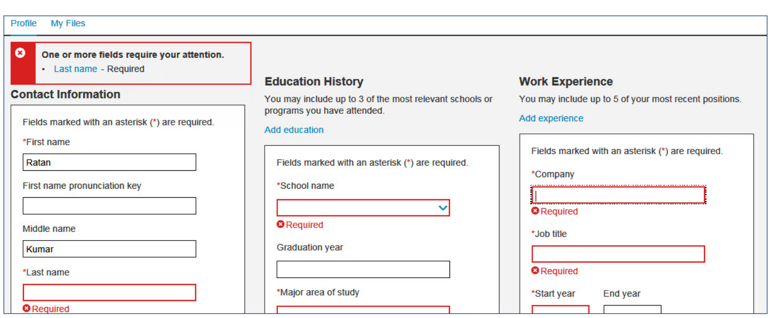
Note: If the Vendor specific set up instructions field is blank, no email is sent to the candidate.

RTC Internal Reference # 95117, 95388.

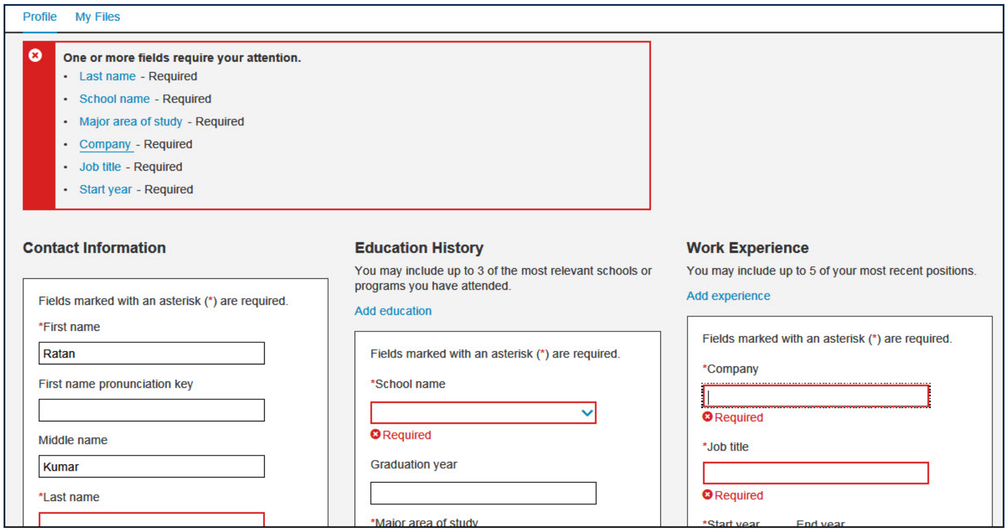
Candidate Zone - Profile Section

When candidates update their profiles in candidate zone, if there are missing fields in the Education or Work experience section, an error message should display. Before this release, error messages were being displayed at field level, but not at the page level. Page level error messages were being displayed only for missing field validations in the contact information section. This deviation is now addressed and page level error messages are displayed for validation errors in Education and Work experience sections as well.

Before this release:



After this release:



RTC Internal Reference # 95330.

New User Interface

The current release includes the following visible changes for the User Interface. Visible changes alter the appearance or performance of the product without requiring any configuration. The changes are immediately visible or available to users.

Requisitions - Job Posting Preview

Before this release, organizations that updated their Talent Gateways (TG) to responsive previously didn't have a way to allow their users to preview the job posting as it would look on a Responsive TG. Users would see the posting in a Classic TG format; which didn't give the user a good idea of what the posting would look like to their candidates.

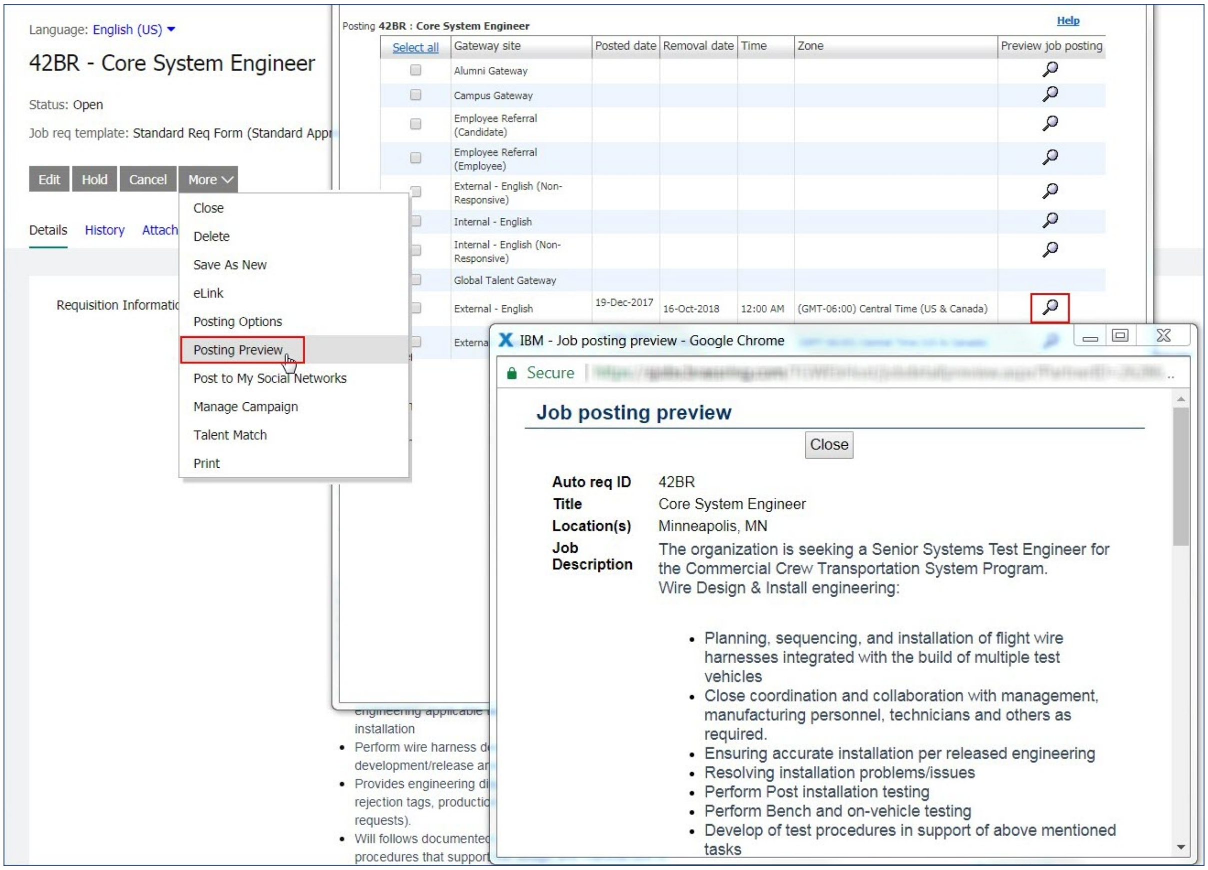
With this release, users previewing job postings in BrassRing now see the job on the Responsive TG (if the TG is responsive).

This change allows recruiters to preview job postings prior to officially posting the job to ensure that formatting and all necessary details are included, ultimately ensuring a better candidate experience when searching for a job.

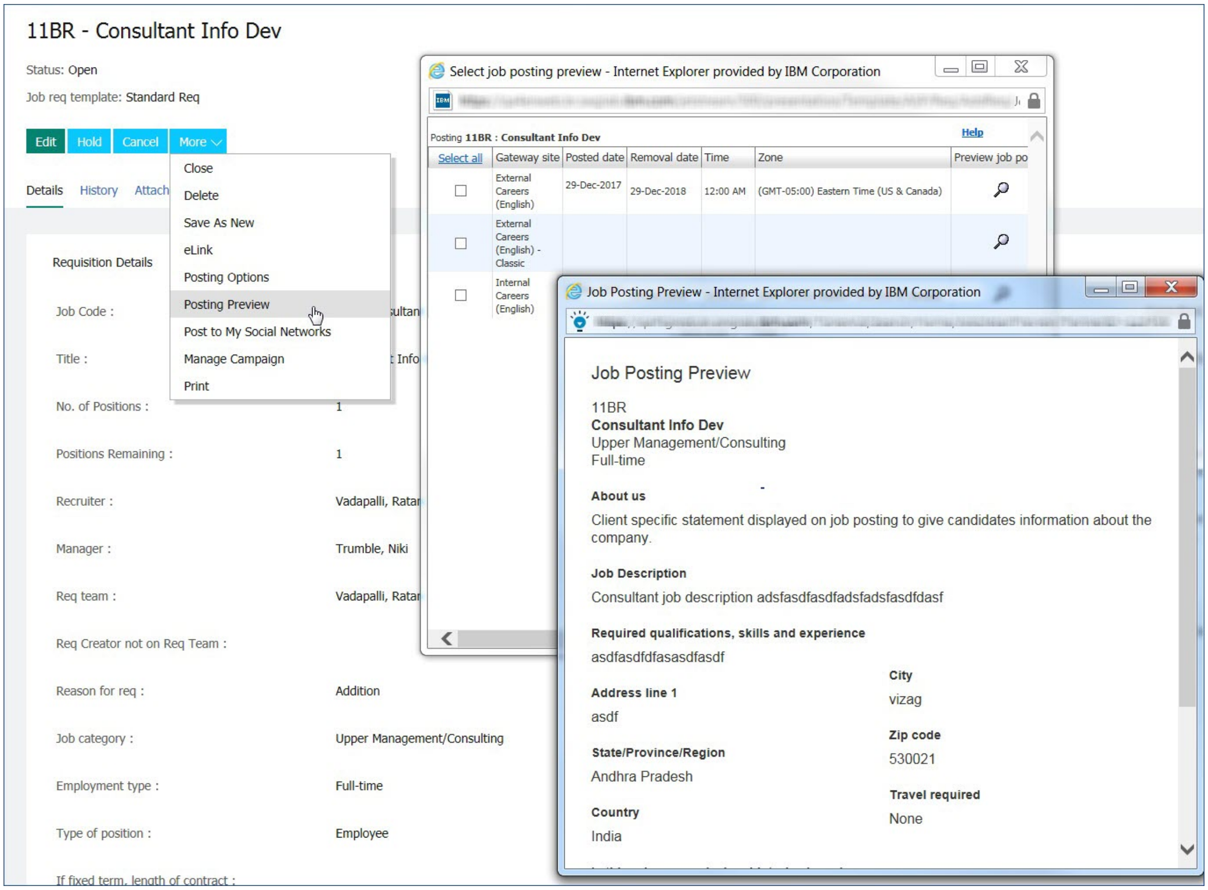
The preview is available in two ways.

- Within BrassRing via the Homepage, **View All Open Reqs** > **View My Open Reqs** page by searching for the req. On the requisition page, select a requisition and then **Actions/More** > **Posting preview** and select the search icon specific to the Talent Gateway.
- By eLinking the Posting Preview page to a user. Homepage, View all Open Reqs page, View My Open Reqspage, by searching for the req. If a user is on one of these pages and selects a requisition, and then **Actions/More** > **Posting Preview** they can select a specific Talent Gateways and select **Send eLink**.

Before this release:



After this release:



Note:

- The Posting Preview is controlled by the client setting **Job Posting Preview (Requires a Full Gateway**. When this client setting is selected (activated), users can take the action to view the posting for any requisitions they have access to (there are no additional user type settings). Client settings can be enabled only by IBM team members. If you would like this feature enabled, contact your IBM representative.
- This feature works whether accessing the Posting Preview from the Classic UI or New UI.
- Posting Preview can be accessed through the More drop down list or from the Actions list while viewing requisitions.

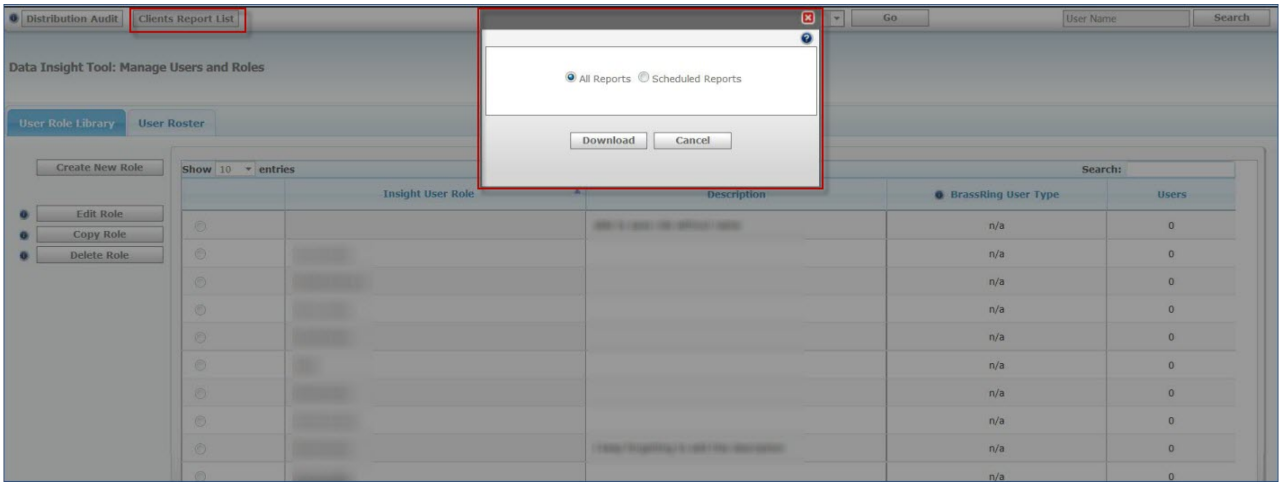
Out of scope of this feature:

- Headers, footers, links, and buttons (including social media buttons) are NOT be included in the preview.
- The locale option is NOT included in the preview. Instead, the recruiter would select the specific member locale when they launch the preview.
- The **Select job posting preview** screen in the New UI is still the Classic UI view. The view changes when you select view the job posting preview.

RTC Internal Reference # 95419.

Data Insight Tool - Client Report List

Clients often need to perform audits on which users are running DIT reports and what the reports include. Before this release to get this information, a client needed to submit a maintenance request. Starting this release, a new selection displays in the **Manage Users and Roles** screen, which is available only for Data Insight Tool administrators. When admin users select Clients Report list, two options are available. They can either download the list of all reports or a list of all scheduled reports.



The following is a list of the information available in the downloaded CSV file:

- Template Name
- Category
- Template Created By
- Insight User Role
- Template Created On
  - Last edited on
  - Edited by
  - Delivery Type
- IsPublic
  - Frequency
  - Frequency occurrence
- Schedule/Adhoc
  - Scheduled GMT
  - ScheduleBy
  - LastRunon
  - Last Run Duration (Min)
  - Recipients
  - Filter Fields
  - Output Fields
  - ProfileType

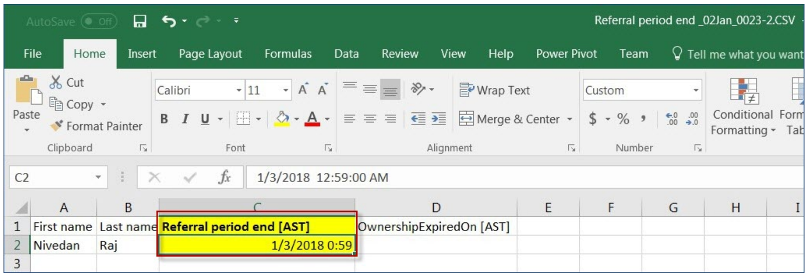
Note: A Data Insight Tool best practices document was posted to the Support Portal. To view the PowerPoint select here.

RTC Internal Reference # 94491.

Data Insight Tool - Time Stamps

When a candidate action log report is generated by using the Data Insight Tool, the date on which a specific action was taken can be presented in the report. This report provides data from the action log of a candidate Talent Record. Based on client requests, starting this release, the time stamp data of the action for specific fields is now being provided in addition to the date. The time stamp of the action is appended to the date in the date column where previously only the date of the action is presented in the report.

The following fields include time stamps with the date stamp:

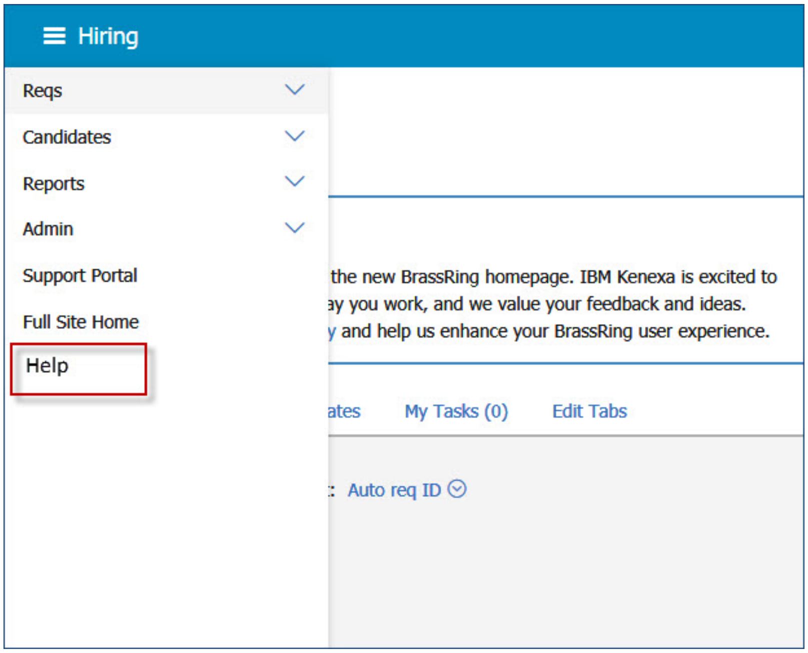


Field Name	Filter Section Navigation
Date added	Candidate->Notes->Date added
Referral status date	Candidate->Employee Referral->Referral status date
Referral submission date	Candidate->Employee Referral->Referral submission date
Date sent	Candidate->Communications->categories of Protected Veterans listed above
Added on	Forms->General Fields->Added on
Last Edited On	
Current HR Status Action date	Job Application->Tracking Logic->Current HR Status Action date
Current HR Status Updated on	Job Application->Tracking Logic->Current HR Status Updated on
Referral period end	Agency->Agency Candidate->Referral period end
OwnershipExpiredOn	Agency->Agency Candidate->OwnershipExpiredOn

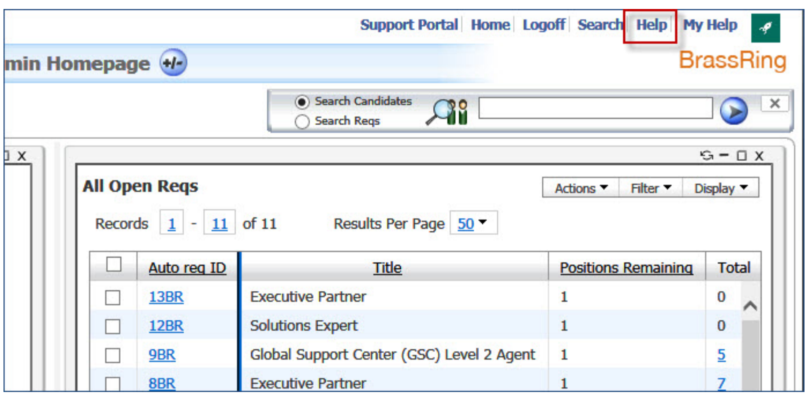
RTC Internal Reference # 92529, 96396.

BrassRing Help - IBM Knowledge Center URLs

Last month, the Talent Suite Help link was changed to direct users to the new IBM Knowledge Center. With this release, a new **Help** now displays in the hamburger menu of the BrassRing new user interface for BrassRing standalone clients. When users select this link, the new IBM Knowledge Center is loaded in a new browser tab or window.



Selecting the existing Help link on the classic BrassRing home page now loads the new IBM Knowledge Center instead of starting the BrassRing help PDF document.



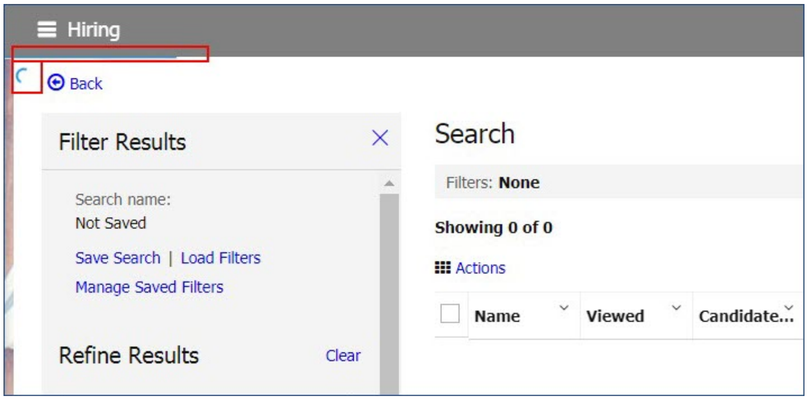
Note: More information about the new IBM Knowledge Center and how to obtain access is available in the New Knowledge Center section.

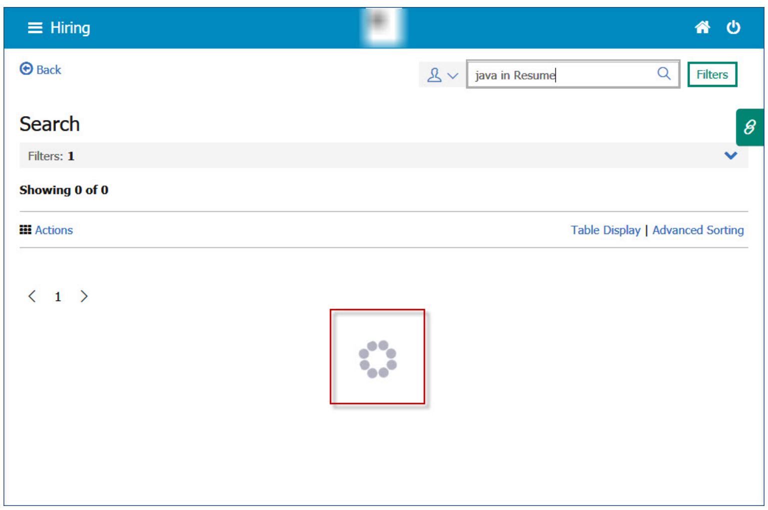
RTC Internal Reference # 93005, 96223.

Candidate Search - Search Processing Indicator

This enhancement is based on a client request. When BrassRing users perform a candidate search, a more prominent indicator displays while the system performs a candidate search. This enhanced user experience lets users know that the system is actively processing the search.

Before this release:



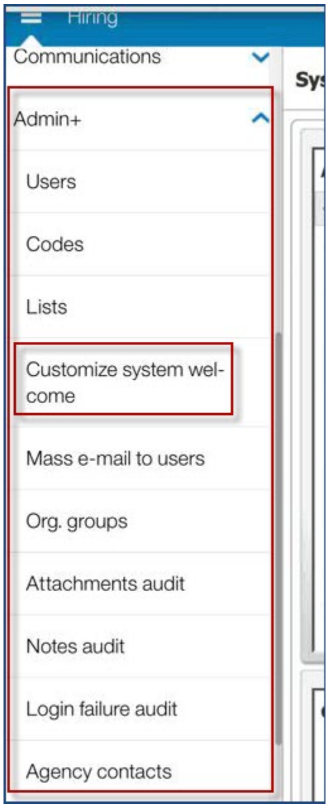


RTC Internal Reference # 89900, 96245.

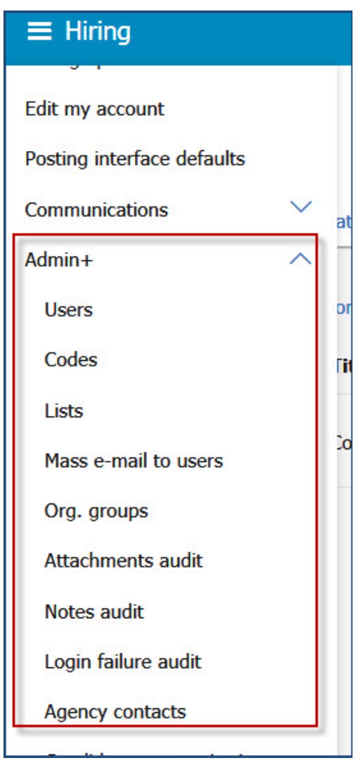
BrassRing - Admin Menu

One of the menu items in BrassRing's, **Admin** > **Admin +** is no longer available starting this release. **Customize System Welcome** no longer displays in the Admin + menu and is unavailable for BrassRing users. The Workbench user type privilege that provides privileges to users is now disabled.

Before this release:



After this release:



RTC Internal Reference# 95650, 97250.

Lead Manager

The current release of Lead Manager does not include any visible changes for Lead Manager. Visible changes alter the appearance or performance of the product without requiring any configuration. The changes are immediately visible or available to users.

Configurable Changes

The current release of IBM Kenexa BrassRing on Cloud includes the following configurable features for BrassRing and IBM Kenexa Lead Manager. Configurable features must be configured or turned on to be visible and available to users.

Responsive Apply

The current release includes the following configurable changes for Responsive Apply. Configurable features must be configured or turned on to be visible and available to users.

Responsive Apply - Auto Fill Fields

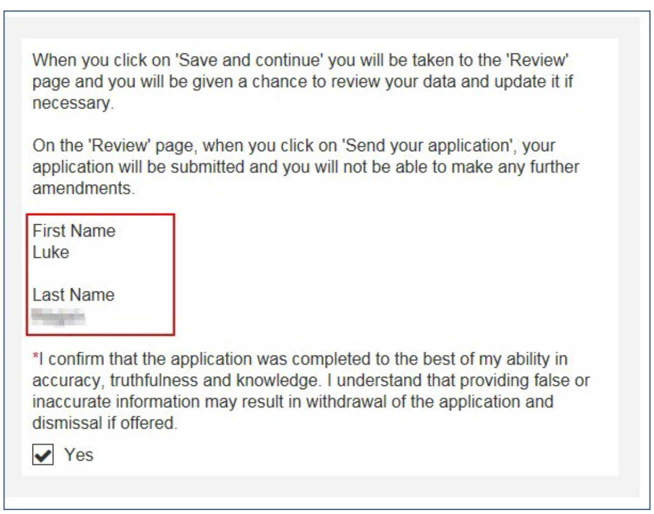
Starting this release, the auto fill fields feature is enhanced to reduce the application submission time and specific auto fill fields are available to be configured to display on the Responsive Talent Gateways and Responsive Talent Gateway Questionnaires. The following are options that auto fill fields can be used for on the Responsive Gateway Questionnaires:

Autofill display: The Talent Gateway displays autofill field with values that are filled from permitted source fields (such as candidate contact fields, date/time, job req fields) as a non-editable label (read-only). This means that candidates are able to view the field that is auto filled but not edit it.

- In the cases where the source value is missing, the autofill field including the label is hidden. A blank value is submitted for this field.
- In cases where the candidate is applying for multiple jobs, the Talent Gateway autofill responses are displayed in fields for each job.

For example, the First Name and Last Name are autofill fields on a candidate form called the Application form. These fields autofill from the candidate Talent Record contact fields. These fields were configured to display on the Gateway Questionnaire to allow the candidate to view the information they previously provided, before submitting for this job on the Responsive Talent Gateway.

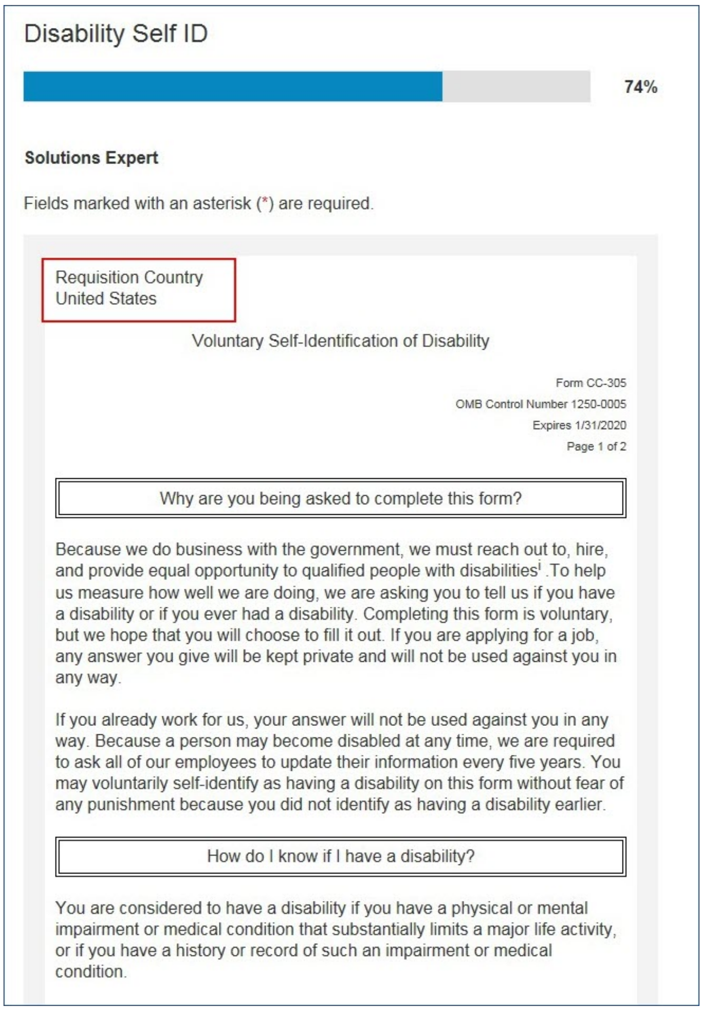
Autofill automatic branching: The Responsive Talent Gateway displays the branched questions



(child questions) if an autofill value meets the branching criteria (according to Responsive GQ configuration).

- If the candidate applies for multiple jobs, and the autofill source is a job req field, then the child questions are displayed for any of the source field values (superset of all values and all branching questions).
- Nested autofill branching is allowed.

For example, the Requisition Country field is an autofill field on a candidate form called the Application form. This field auto-fills from a requisition field that collects the country of that req. This field was configured to then branch and show additional candidate form fields if a specific value was selected. In this example, the fields from the Disability Self ID form displays the req's country.



Source Update following Save as Draft: Autofill values are updated by the Talent Gateway in the following cases:

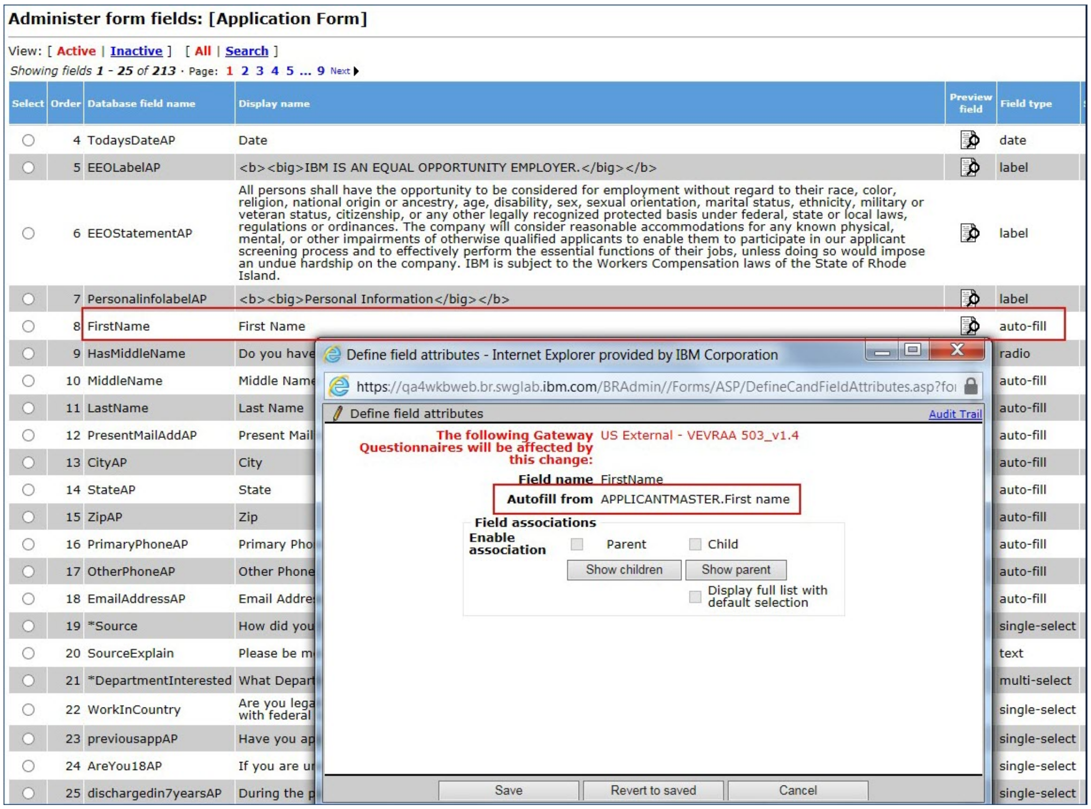
- If the source field of an autofill field is a candidate contact field (such as email, or country) then when a candidate continues to apply from a saved draft, the most current source value is fetched upon loading the original page with autofill question, or review page (including all autofill questions with values) or on submission, so it consists the most current value.
- If the autofill field's source is a job req field (such as job title) and if the requisition is either updated or reposted before the candidate continues applying using the saved draft, the Talent Gateway automatically updates the autofill value and discards values for old child branch questions.
- If the autofill field's source is date/time (time stamp), and a candidate continues to apply using saved draft, the time value is not reset unless the candidate browses to the page with the original autofill question. Reset happens if the candidates browse to the page with original

auto fill question. If the candidate saved the draft from Review page, and then continued using the saved draft, it would show original autofill date/time value.

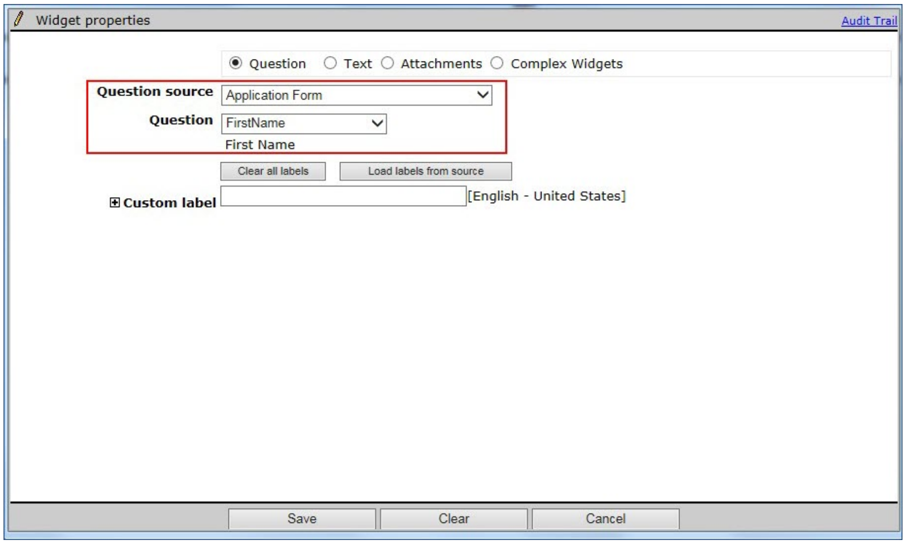
To configure an autofill to display on the Responsive Gateway Questionnaire:

- Confirm that the candidate form field auto fills from a permitted source. In this example, the First Name field is auto filling from the candidate's Talent Record.

Workbench > **Tools** > **Gateway Questionnaires** > **Administer section/pages** for the desired



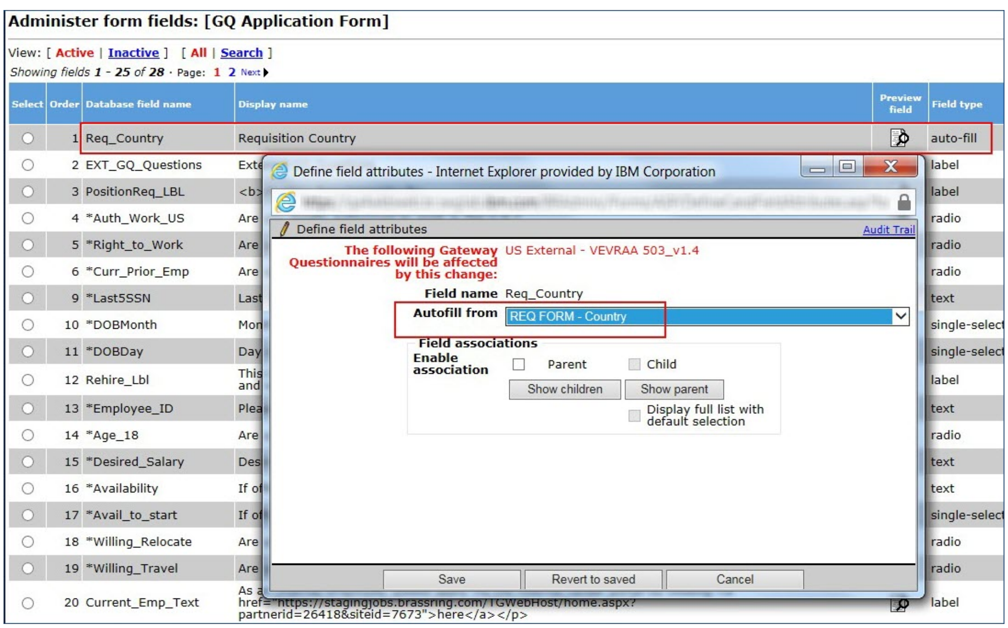
Responsive Gateway Questionnaire > **Administer widgets on the desired page** > **add a widget** > **select the desired candidate form from the Question source field** > **select the desired Autofill question from the Question field** > **Save** > **continue the activation of your GQ and post your requisitions with the GQs to allow this to be visible to the candidates.**



To configure an autofill to display on the Responsive Gateway Questionnaire and use GQ branching:

- Confirm that the candidate form field auto fills from a permitted source. In this example, the Requisition Country field is auto filling from the req field of Country.

Workbench > **Tools** > **Gateway Questionnaires** > **Administer sections/pages for the desired**

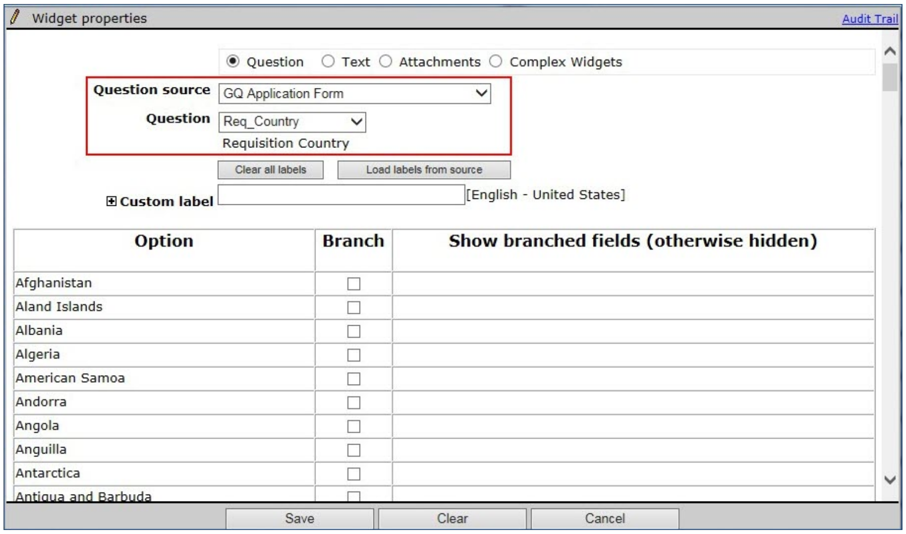


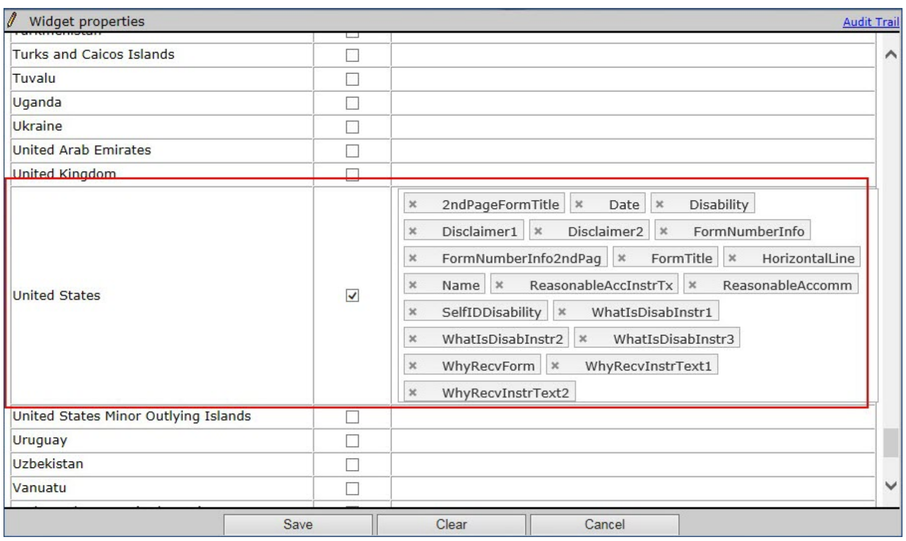
Responsive Gateway Questionnaire.

1. Administer widgets on the selected page.
2. Add a widget.
3. Select the candidate form from the Question source field.
4. Select the Autofill question from the Question field.
5. Select the Branch check box.
6. Select the fields you would like to show if one of the specific field options is chosen (in this case, the Disability Self ID fields will show IF the Requisition Country field equals United States).

7. Save.
8. Continue the activation of your GQ and post your requisitions with the GQs to allow this to be visible to the candidates.

Out of scope:





- There are no changes or enhancements to Classic Gateway Questionnaires or to the non-GQ apply process.
- Branching is not available for any source field type other than single-select or radio button. (e.g., branching for text, email, or check box field types is not allowed)
- Fields that have the autofill source of code, education, or experience fields not included. Only candidate contact fields, req fields, and date/time fields are included in this feature.
- Use of the following source field types for autofill from: multi-select, check box, SSN, grid (these 4 types are blocked or N/A from Workbench).
- Currently branching can be configured only for req form fields only (custom req fields). Fields such as standard req fields and Talent Record (Applicant Master) fields cannot be branched at this time.
- The candidate stacking field is not allowed as a source field (does not exist in the "pull from" list for Autofill field).

- The SSN field type may not be used as source. (It is not allowed for Req form fields, only for the custom candidate stacking field, which as above is not available.)
- The question widget attributes of Score and Knockout are hidden for fields with an autofill source.
- The disable prefill and required attributes are not applicable.
- Previewing the GQ does not show any value for autofill fields (and no branching is shown).

RTC Internal Reference # 80040, 87592.

New User Interface

The current release does not include any configurable changes for New User Interface. Configurable features must be configured or turned on to be visible and available to users.

Lead Manager

This release introduces support for the Lead Manager includes a **NEW User Experience** for **Send Communication**. Designed to provide greater flexibility for customization by Sourcers/Recruiters, the new experience is more intuitive and provides a means of a final preview of the communication prior to sending. The following configurable changes for Lead Manager are required in order to enable the new experience. Configurable features must be configured or turned on to be visible and available to users.

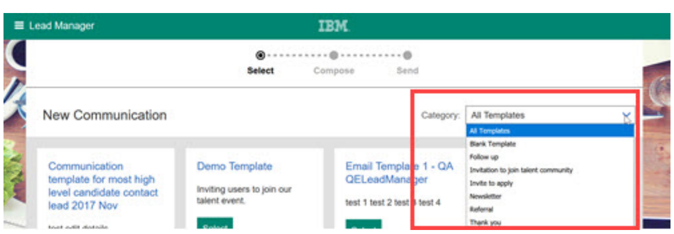
Send Communication

This release introduces support for the Lead Manager **NEW Send Communication** experience in the **Send Communication** workflow. The **Send Communication** experience allows clients to configure customized templates in Watson Campaign Automation (WCA) and further customize those templates during the **Send Communication** workflow. During the **Send Communication** workflows, clients can send communications to one or multiple leads, further customize configured templates with new customized tokens, and preview the communication before sending.

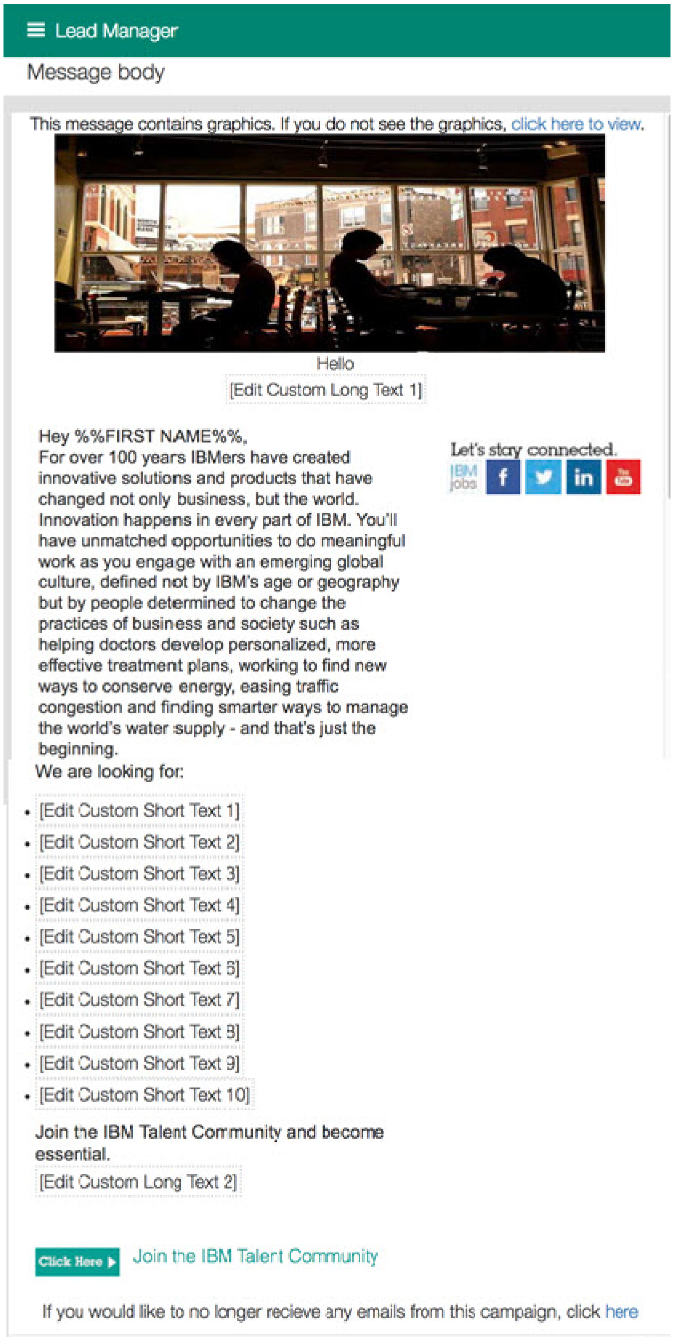
Send Communication

When composing communications in the **NEW Send Communication** experience, Sourcers/Recruiters now have an easier way to select templates during the **Send Communication** workflow and further customize their communication templates using new customized tokens. Let's explore some of the **NEW Send Communication** enhancements to the **Send Communication** user experience: Lead manager users can now:

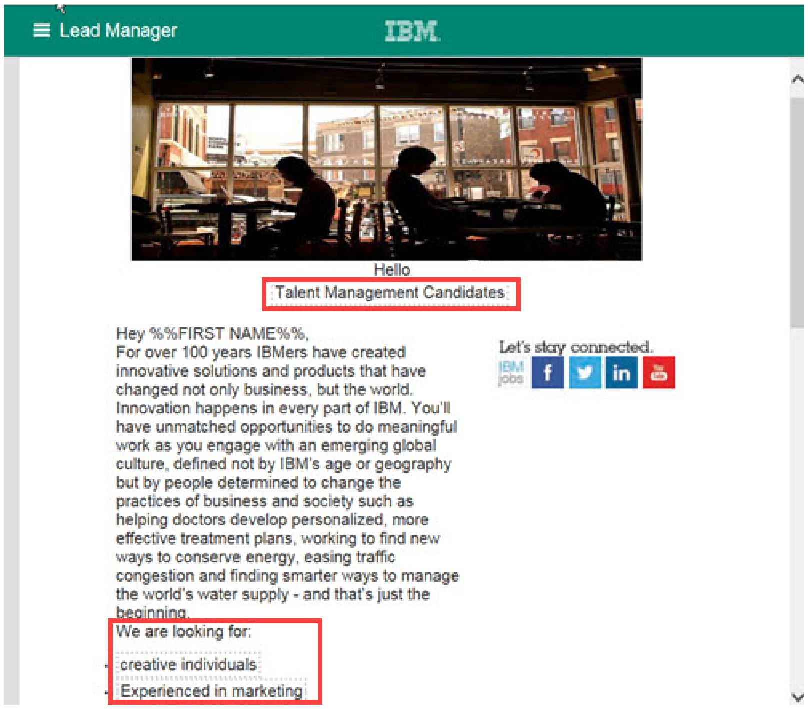
- Select one, multiple, or all leads within a specific campaign
- Select a template from a Template Management page. Each template on this page is categorized and contains descriptions describing the templates intent. Users can easily sort templates using the **Category** action.



- Select multiple custom text tokens (replacing the single %%SP_CRM_BLOCK%% token) fields that provide greater flexibility on where the message can be customized.



- Type directly into the customized tokens text fields in templates for a more natural feel.



- Select Campaign tokens to insert standard campaign field data into the mailing.

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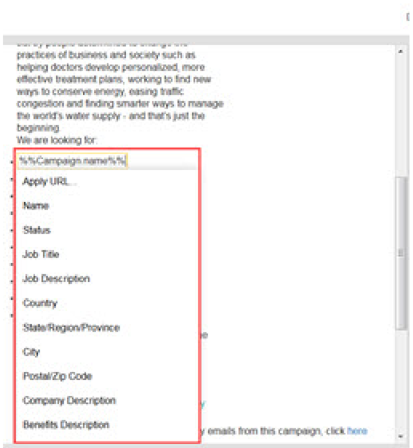
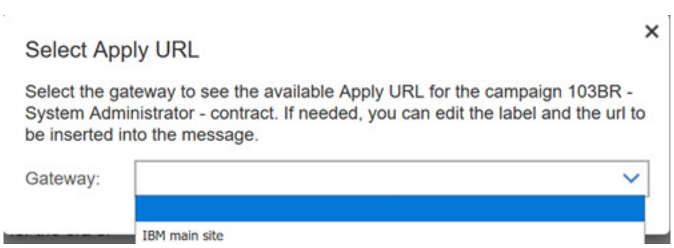
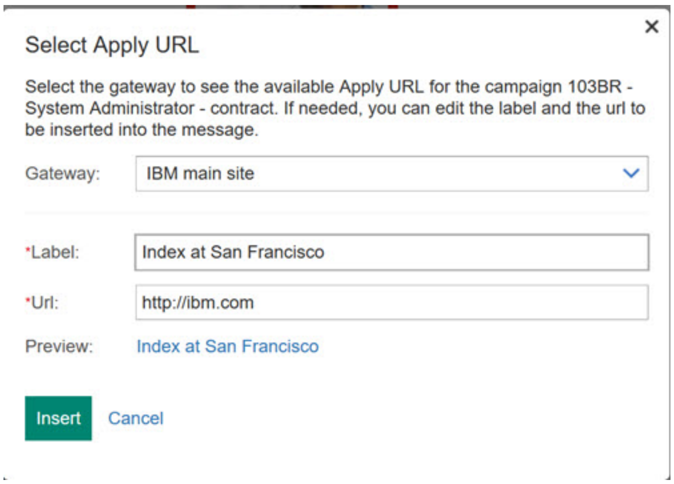


- Create customized **Apply URLs** within the mailing, allowing clients to mask the Talent Gateway URLs.
  – User selects the **Apply URLs** custom token within the template: The **Apply URL** modal opens.

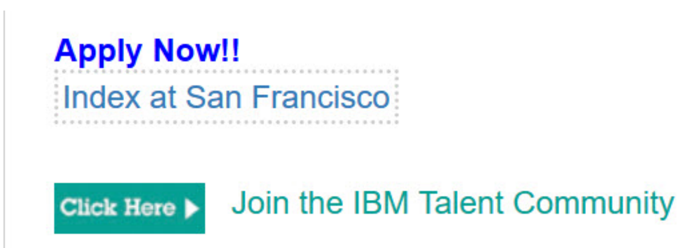


– User selects the site from the drop down menu on the **Apply URL** modal. The **Apply URLs** modal opens to reveal additional options.

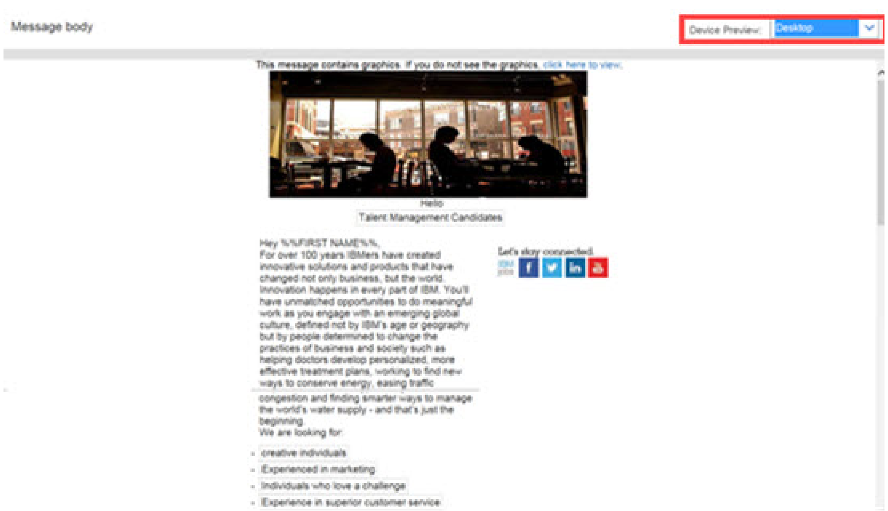


– User can edit the **Label** mask for the Apply URL page. User can also select **Preview** to view the Apply URL.

– User selects **Insert** insert the URL into the message template. The label for the Apply URL now displays within the message template.



- Preview the final mailing in either desktop, tablet, or mobile views prior to sending.



- Select **Choose another template** if user is not pleased with how the communication looks, or **Continue composing** if the users notices something they'd like to add to the template.

- Create personalized signature via custom field tokens.

Note:

- The **NEW Send Communication** requires clients to **update their message templates** in **Watson Campaign Automation** (WCA) before filing a request to enable this feature. All template creation is completed in the WCA and all tokens are added to templates in WCA. Executive Partners are available to guide clients through the process of updating their templates and transitioning to the **Send Communication** workflow.

Custom Text Field Tokens

Previously in Watson Campaign Automation, clients used the **%%SP_CRM_BLOCK%%)** tokens to customize templates sent to leads. The **Send Communication** enhancement introduces twenty new tokens:

- **CustomLong**
- **%%CustomLong1%%**
- **(10 versions 1-10 are supported)**
- **Custom Short**
- **%%CustomShort1%%**
- **(10 versions 1-10 are supported)**

These tokens can be used to add custom text, Campaign tokens, or Apply URL tokens.

- Personalization tokens added to message templates in WCA will add Lead Fields at the time of sending. These cannot be edited in Lead Manager. They are added by selecting **Insert Personalization** in Watson Campaign Automation. When personalized tokens are used in templates, when Lead Manager users use **Send communication** these tokens will be replaced with the recipients information (for example: %%FirstName%% will display the recipients firstname in the communication they receive).
- Custom Text Tokens added to message templates in WCA can be used to add text, Campaign profile fields, or Apply URLs when composing a message within Lead Manager.
- Message templates created in WCA can use both types of tokens in a single message template. For example, Lead Manager users can initiate the **Send commuication** from within a campaign and use both standard campaign fields and text fields. Campaign and Apply URL tokens will not be available outside of the Campaign flow.

The **Send Communication** workflow introduces 20 new custom text substitutions:

- 20 new custom text substitution tokens are now supported: %%CustomLongText1%% %%CustomLongText2%%, etc up through 10 and %%CustomShortText1%%, %%CustomShortText2%%, etc up through 10. In the UI the tokens appear as "Enter Text"
- When long and short custom text are used in message templates, the text inherits the formatting of the template
- Client can enter Apply URLs in custom text fields
- **10 new long custom text fields**
  - Long custom text fields are identified as **%%CustomLongText1%%** through **%%CustomLongText2%%**

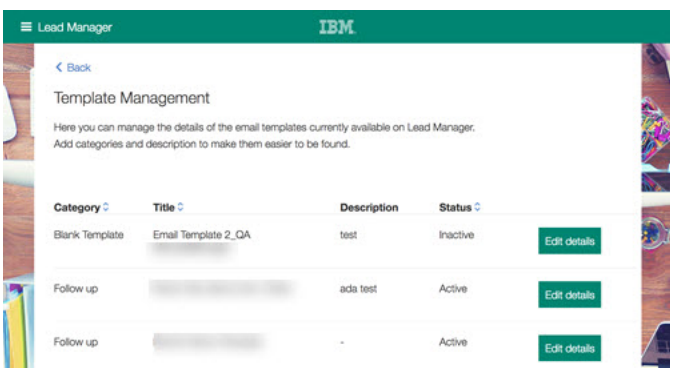
- Long text fields have a max character limit of 5,000. Any additional characters over 5,000 are not accepted in the text box and do not display in the template. Template text boxes must be large enough or expand to easily view text (whether expands or scrolls).
- Custom tokens inserted into templates appear as **Enter Custom Long Text 1 (as appropriate for the token)** fields in the templates in Lead Manager.

- **10 new short custom text fields**
  - Short custom text fields are identified as **%%CustomShortText1%%** through **%%CustomShortText2%%**
  - Short text fields will have a max character limit of 300. Any additional characters over 300 are not accepted in the text box and do not display in the template. Template text boxes must be large enough or expand to easily view text (whether expands or scrolls).(more characters won't be accepted in text box)
  - Custom tokens inserted into templates appear as **Enter Custom Short Text 1 (as appropriate for the token)** fields in the templates in Lead Manager.

When clients use the new tokens in templates:

- All new custom text fields inherit the formatting that is used in the template
- Text entered by user will replace the token when the mailing is previewed and/or sent
- If no text is entered in a token field in Lead Manager, the area will be blank when the message template is sent (recipient will not see the %%CustomText_1%% token)

When creating a communication, Sourcers/Recruiters now have an easier way to determine which template to use. Privileged users can add descriptions for each template and assign a category and status to assist with template management.



Send Communication from Main Dashboard Workflow:

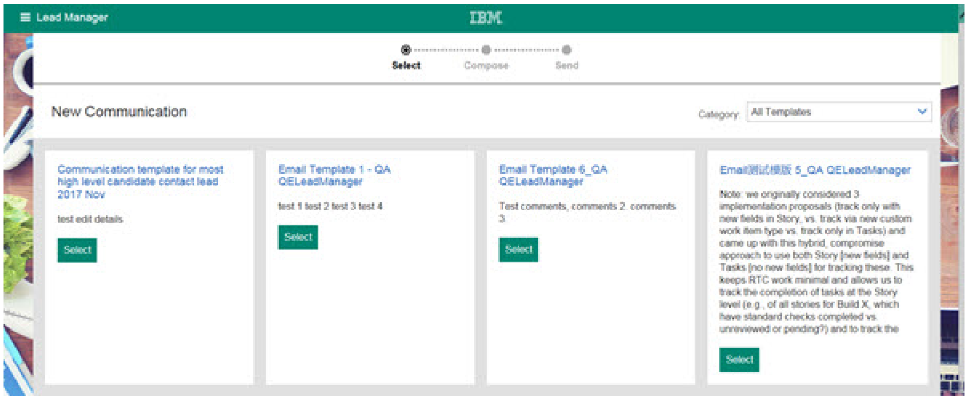
This Lead Message Template Workflow detailed here uses **Edit tokens** which appear as **Enter Text** in the templates and are editable.

Send Communication Workflow

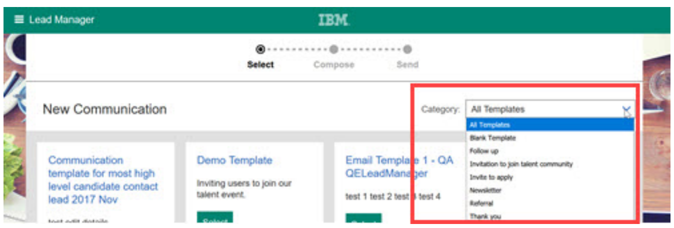
Let's walk through the enhanced **Send Communication** workflow. The tokens used in this Message Template are **Edit tokens**, since the communication is initiated outside of a Campaign context, the user will only be able to enter text in the field, no Campaign tokens will be available.

On the Lead Manager main page user:

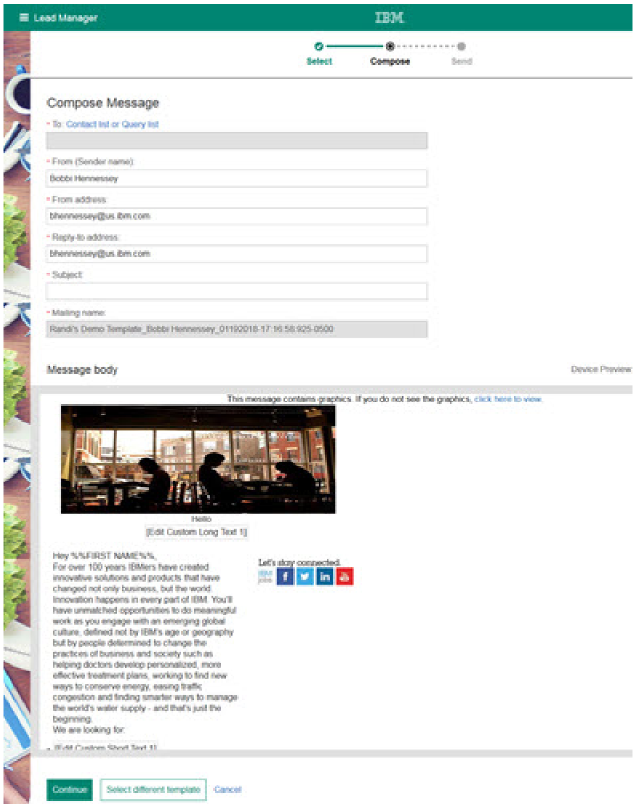
- Selects **Send Communication** on the action menu to access the template selection page, the initial step in the Send Communication workflow. The New Communication page opens and displays the client's existing templates. Each template is identified by it's template name and description.



- Templates can be filtered by **Category** to simplify template selection.

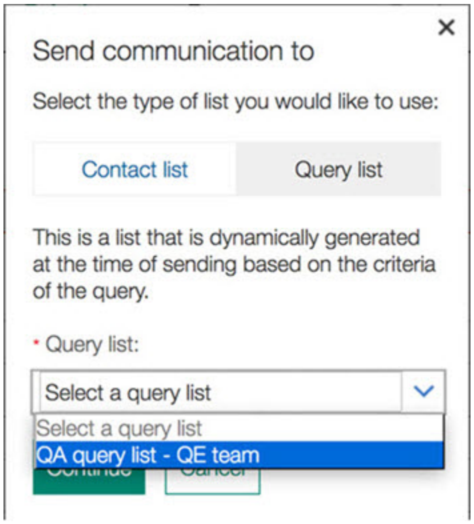


- Chooses the **Select** action for a template on the New Communication page. The Compose Message page opens.
  On the Compose Message page, clients can add contact or query lists, and edit any of the

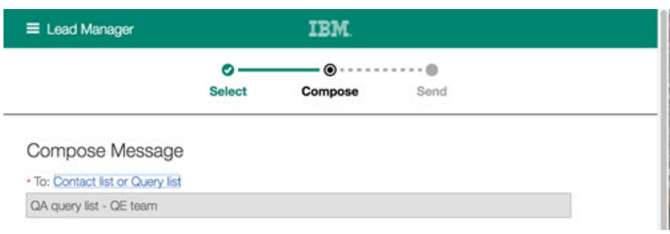


  Compose Message fields (From, From Address, Reply to, and Subject) within the message. Users then create a personalized/customized message by entering text in any of the custom text fields made available in their templates.
-

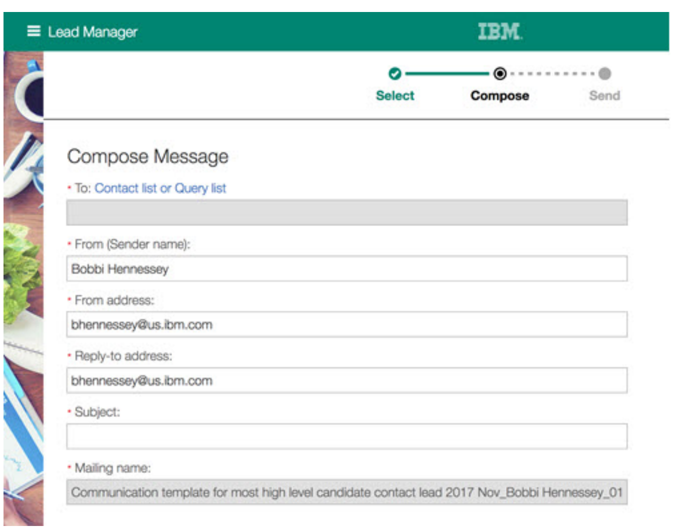
  Note: If clients use long or short custom text fields, long text fields have a character limit of 5,000 and short text fields have a character limit of 300.
  Once edits are complete, the final message template can be previewed in desktop, tablet, or mobile format for final review prior to sending the communication.
- Let's walk through the editing process. Lead Manager user:
  – Selects the hyperlinked **Contact List or Query List**. The **Send Communication to** dialog box opens. User can select **Query list** or **Contact list** and then select a corresponding **Query list** or **Contact list** from the drop down menu on the dialog.



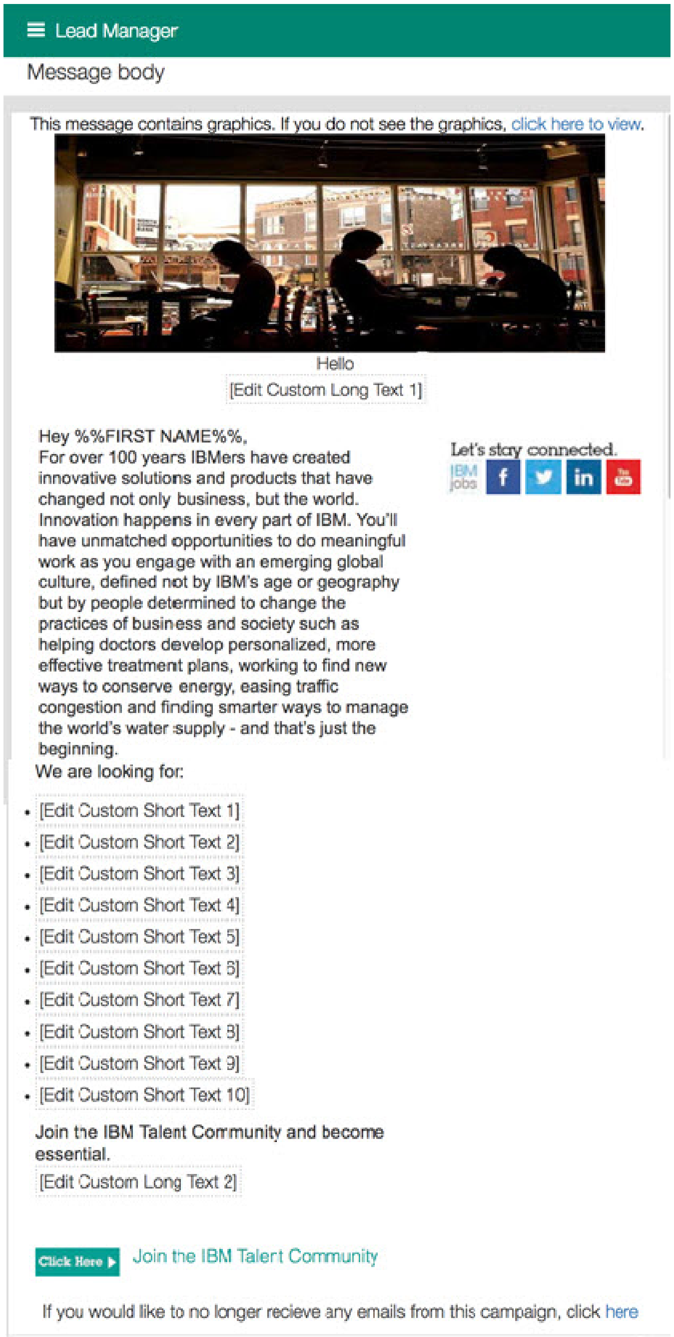
– Selects **Continue** after selecting a Query or Contact List. The **To** field in the Compose Message section auto-fills with the selected Query list.



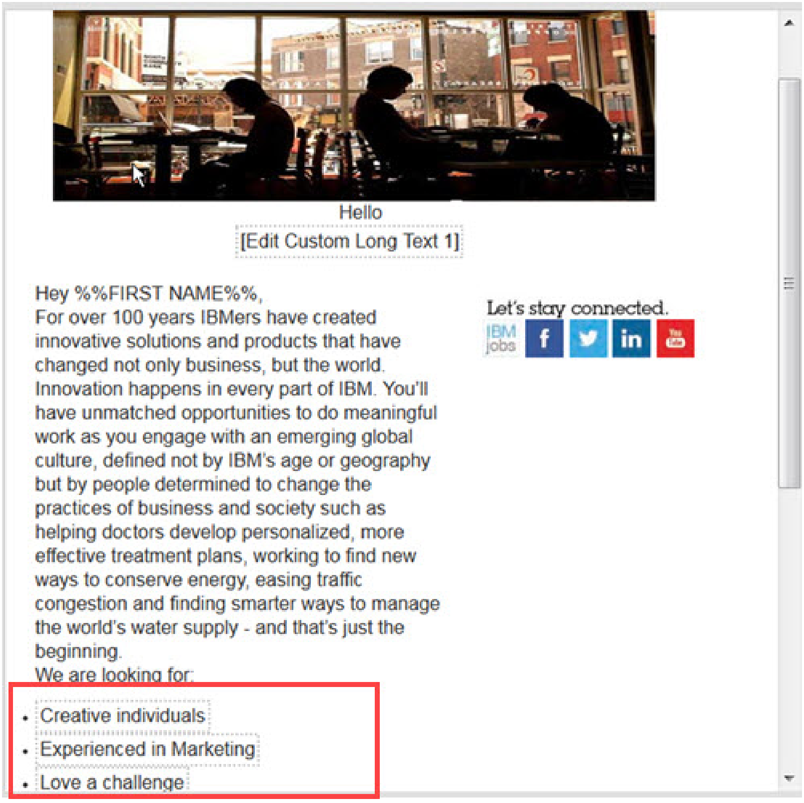
– Completes all fields in the Compose Message section. All fields in the Compose Message section are required.



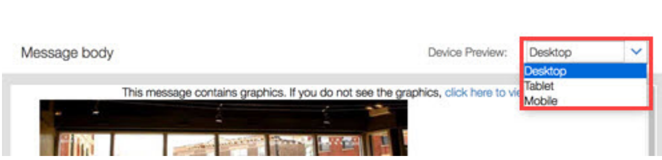
- Types in custom text in the message token fields if used. If a message token field is used during template creation in WCA and users do not enter customized text, the field displays as blank when the message template is sent. All text that is entered in the custom text fields inherits the formatting of the template.



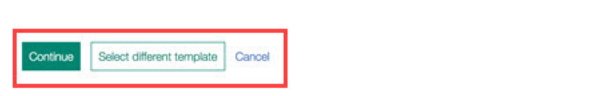
Note: Tokens are resolved when users select **Preview** options.



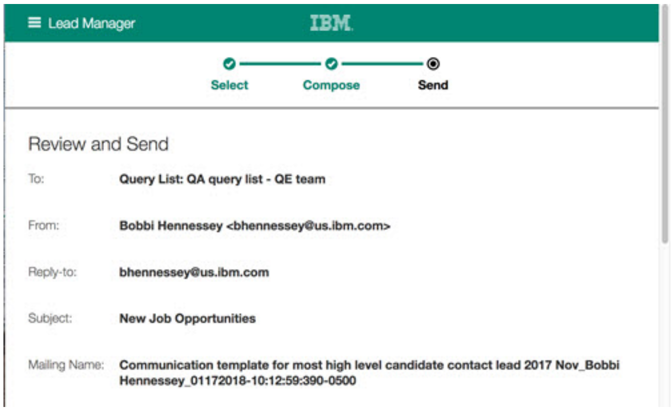
- Previews message template in the Message body section. Users can select **Desktop**, **Tablet**, or **Mobile** to preview the message template for each of those devices.



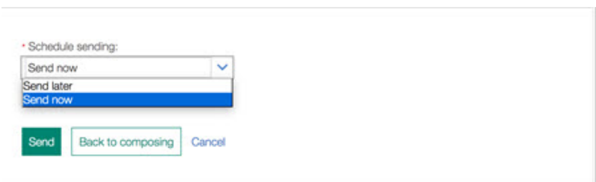
- Types in custom text in the message token fields if used.
- Selects **Continue**, **Select different template**, or **Cancel**.



- Selects **Continue** as user is satisfied with the template preview. The Review and Send page opens. User reviews the completed message content.



- Selects the **Schedule sending** drop down menu. Users can select **Send now** or **Send later**.



When a Lead Manager user selects **Send Later**, the UI changes allowing the user to input the future send date.

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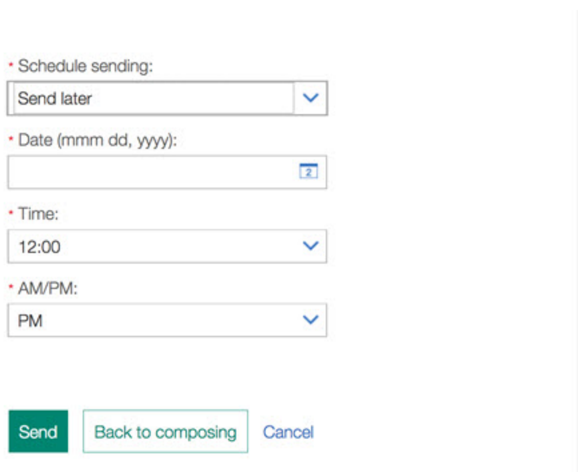


Lead Manager user completes the following fields for the future send date:
- Date in prescribed date format. (mmm, dd, yyyy) or selects from the calendar picker
- Time - Inputs time or uses the drop-down arrow and selects a time
- AM/PM - Selects AM or PM

- Selects **Send**. The message template is sent and a confirmation displays.

Send Communication from Campaign Workflow:

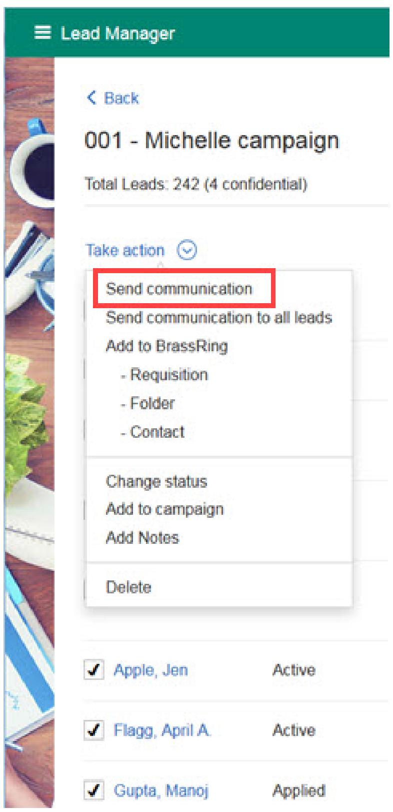
When Lead Manager users initiate the **Send Communication** workflow from within a campaign, and the message template has been created in WCA with custom text tokens, the user will be able to insert campaign fields into the message, in addition to entering custom text.

Send Communication Workflow

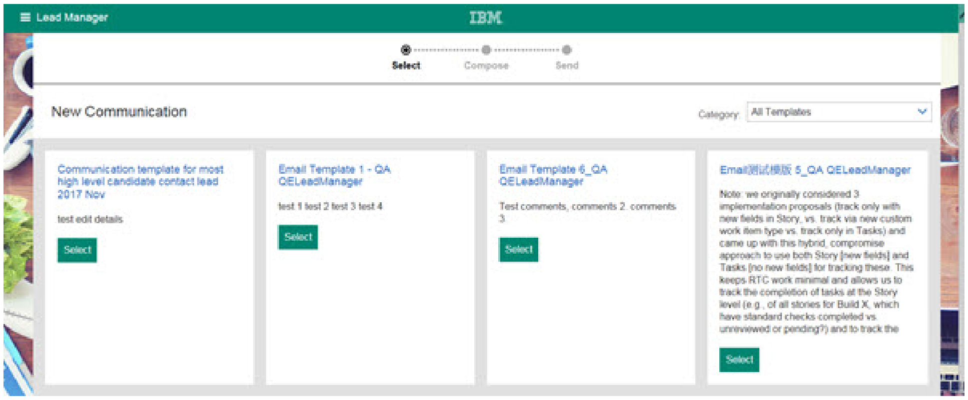
Let's walk through the enhanced **Send Communication** workflow from within a campaign.

On the Lead Manager lead page user:

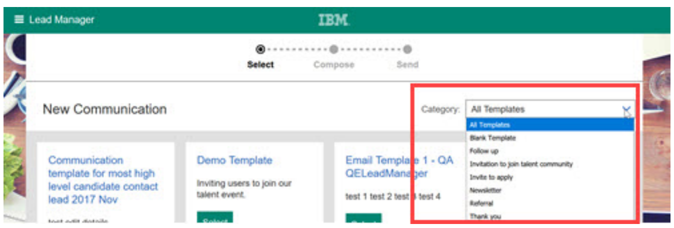
- Selects leads **within a campaign** on the lead grid page.



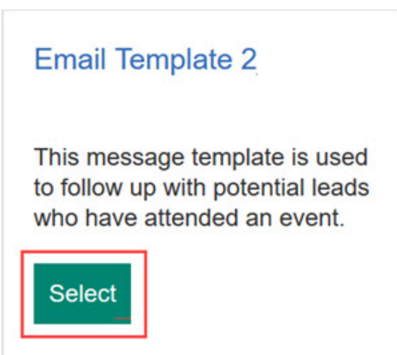
- Selects **Send Communication** on the action menu. The New Communication page opens and displays the client's existing templates. Each template is identified by it's template name and description.



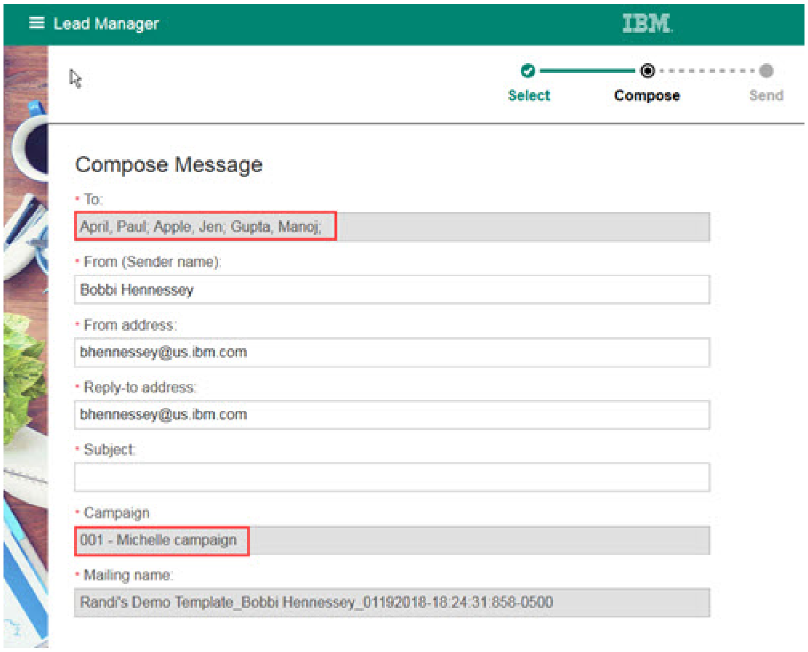
- Templates can be filtered by **Category** to simplify template selection.



- Chooses the **Select** action for a template on the New Communication page.



The Compose Message page opens. The **To** field on the template auto fills with the selected leads and the **Campaign** field auto fills with the campaign name.



Users may enter text in the custom text fields or select one of the **Campaign fields/Apply URL fields** to be inserted. A combination of both text and token may also be used.

•

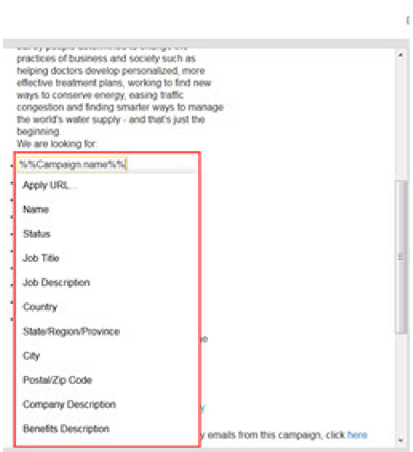
Note: If clients use long or short custom text fields, long text fields have a character limit of 5,000 and short text fields have a character limit of 300.

Let's walk through the editing process. Lead Manager user:

– Selects **Continue** after completing the **Subject** text.

– Completes all fields in the Compose Message section. All fields in the Compose Message section are required.

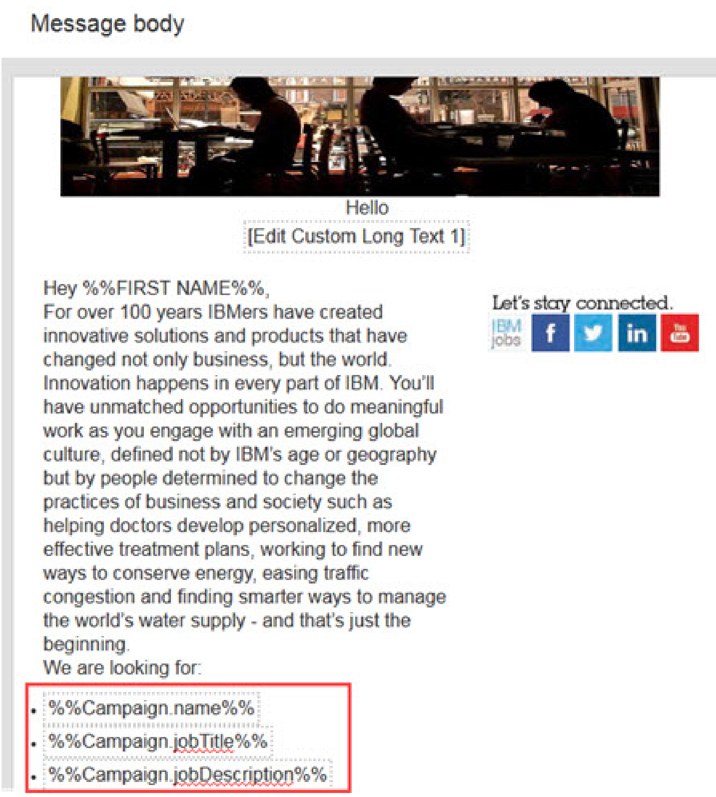
- Selects the applicable custom text field and then selects a standard campaign field from the drop down list. Selected fields inherit the formatting of the template.



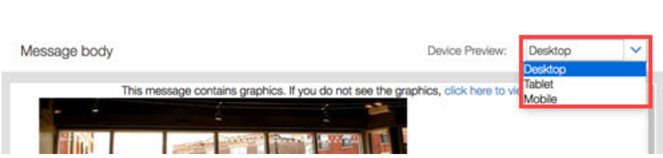
Note:

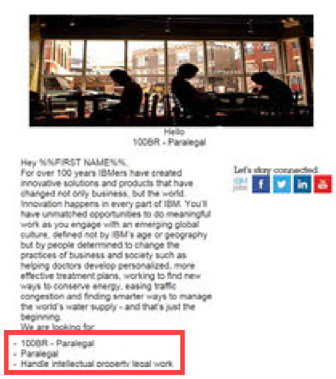
– If a message token field is used during template creation in WCA and users do not select an associated standard campaign field, the field displays as blank when the message template is sent.

– Tokens are resolved when users select **Preview** options.



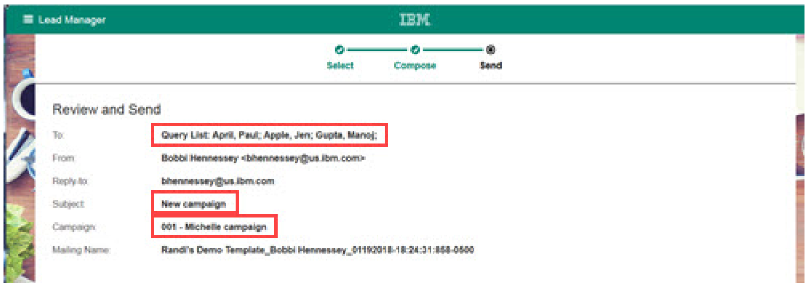
- Previews message template in the Message body section. Users can select **Desktop**, **Tablet** or **Mobile** to preview the message template for each of those devices.



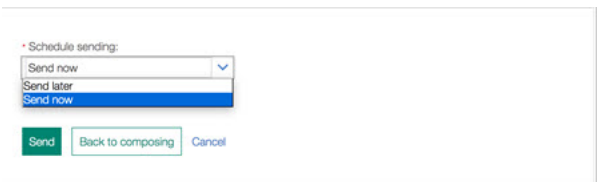


- Selects **Continue**, **Select different template**, or **Cancel**.

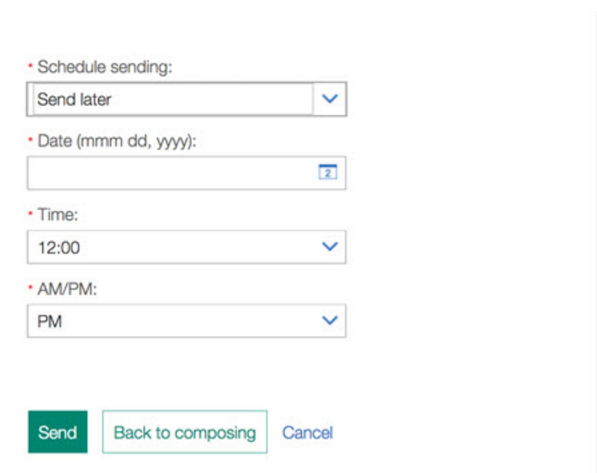
- Selects **Continue** as user is satisfied with the template preview. The Review and Send page opens. User reviews the completed message content.



- Selects the **Schedule sending** drop down menu. Users can select **Send now** or **Send later**.



When a Lead Manager users selects **Send Later**, the UI changes allowing the user to input the future send date.



- Lead Manager user completes the following fields for the future send date:
  - Date in prescribed date format. (mmm, dd, yyyy) or selects from the calendar picker.
  - Time - Inputs time or uses the drop-down arrow and selects a time
  - AM/PM - Selects AM or PM
- Selects **Send**. The message template is sent and a confirmation displays.

Manage Templates Workflow

The **Manage Templates** workflow allows privileged user to categorize, add/edit descriptions and set status for all message templates within Lead Manager. Clients can easily categorize templates for different campaign types, designate templates as **Active** or **Inactive**, and provide descriptions of the template's s purpose to assist users in selecting the correct one for their purpose. Templates can be associated with more than one category.

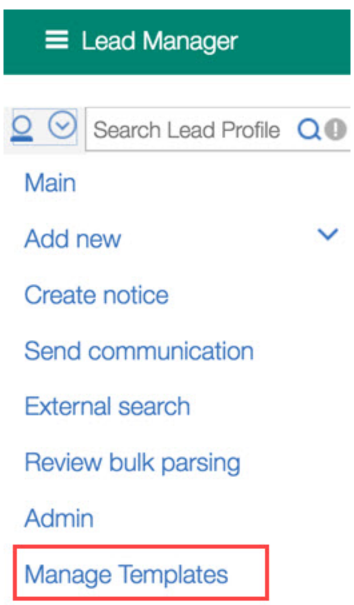
Manage Templates

In the **Manage Template** workflow Lead Manager users can view, categorize, and edit details for all templates on the Template Management page.

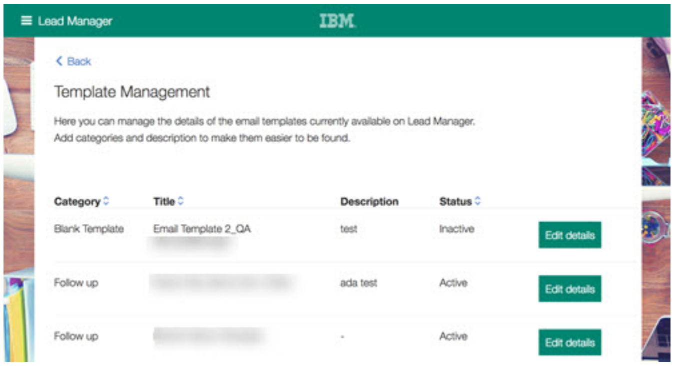
Note: Lead Manager users must have the **Communications - Manage Template** privilege to access **Manage Templates**.

Let's walk through the Manage Template workflow. Lead Manager users select the **Manage Template** action on the main menu in Lead Manager and:

- Select **Manage Templates** from the main menu.

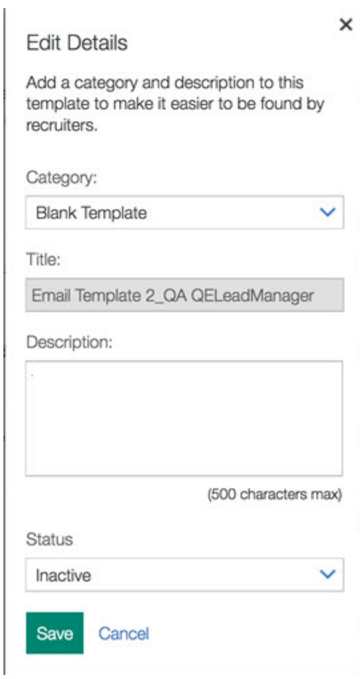


The Template Management page opens.

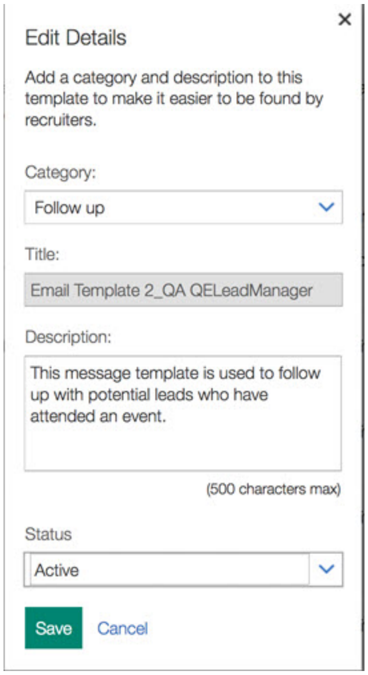


The Template Management page displays four columns for each template: **Category**, **Title**, **Description**, and **Status**. The **Edit Details** action for each message template allows users to edit the details for that message template.

- Select **Edit Details** for a message template. The **Edit Details** dialog opens. In this dialog, the Lead Manager user can change the **Category**, **Description**, and the **Status** of the Message Template.

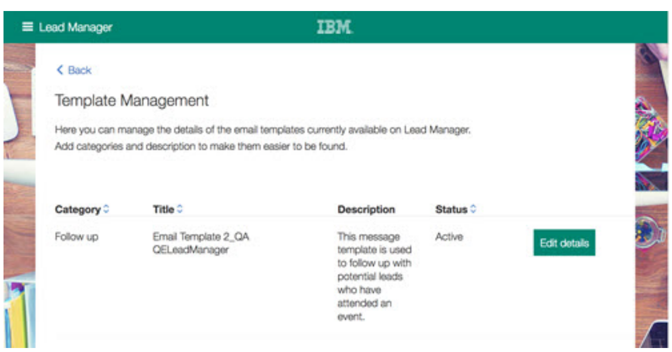


- Edit the Message Template **Category** to Follow up, the **Description** to the intent of the message template, and the **Status** to Active.



- Select **Save**. A confirmation displays.

- Select **OK**.
- Views the edited Message Template on the Template Management page.



How Do clients get this feature?:

The **NEW Send Communication** experience requires clients to **update their message templates** in **Watson Campaign Automation** before filing a request to enable this feature. All clients must follow this protocol.

Configuring Send Communication Enhancement

In order to ensure a smooth transition to the **NEW Send Communication** experience, it is recommended to prepare Watson Campaign Automation (WCA) templates and work with your Executive Partner to deploy the **NEW Send Communication** enhancement to your staging environment. Deploying first to a client's staging environment ensures a smooth transition to the **Send Communication** workflow.

Clients must work with their Executive Partners to prepare to enable the new **Send Communication** enhancement. In Watson Campaign Automation (WCA) preparation includes:

- Creating new or editing existing Lead Manager templates; the existing **%%SP_CRM_BLOCK%%** must be removed/replaced with **%%CustomLongText*n*%%** and any additional tokens that assist the Sourcer/Recruiter in creating a compelling message must be added to the templates.
- Templates can include text, graphics, links, videos.

Note:

- Lead Manager users must have the Lead Manager user privilege **Leads - Send Communication** to access the Send Communication features.
- Lead Manager users must have the Lead Manager user privilege **Communications - Manage Templates** to access the Manage Template feature.

RTC Epic 88956 #

BrassRing Workbench

The current release of IBM Kenexa BrassRing on Cloud includes the following configurable features for IBM Kenexa BrassRing Workbench. Configurable features must be configured or turned on to be visible and available to users.

BrassRing Workbench Changes

This release introduces the following BrassRing Workbench configurable changes.

Known Limitation - Quick Links Configuration

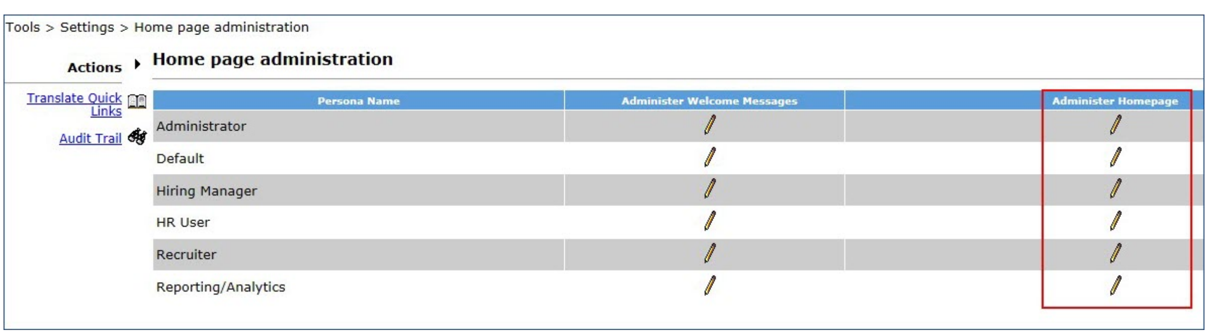
When editing a persona's Quick Links through the Administer Homepage functionality in Workbench the following issue has been recognized and will be corrected in a future release (RTC #97746).

A session expired message shows when user attempt to delete a Quick Link folder for a persona that has only one folder (not multiple folders). Alternatives: Users can add a folder and delete the previous one or users can edit the folder name instead of deleting it.

BrassRing - Home Page Configuration

Prior to this release, the BrassRing homepage was not configurable by Workbench Administrators. In order to dictate what new users see when they log in to BrassRing for the first time, Workbench admins can now set default configurations for each persona. This ensures that admins can regulate what new users are seeing; allowing users to get working in the system quickly with company standard settings.

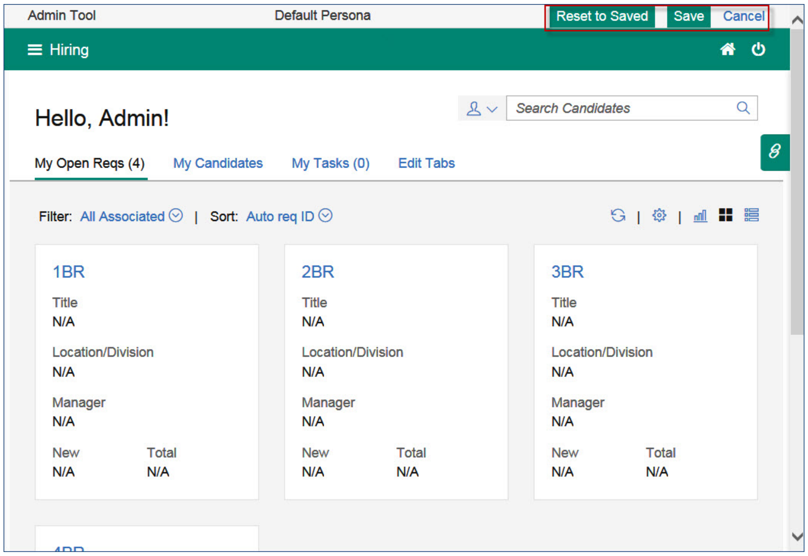
Workbench users with appropriate privileges can now configure the BrassRing home page from **Tools** > **Settings** > **Home page administration** > **Administer Homepage for the appropriate persona**.
Users can now configure the following fields in the home screen:

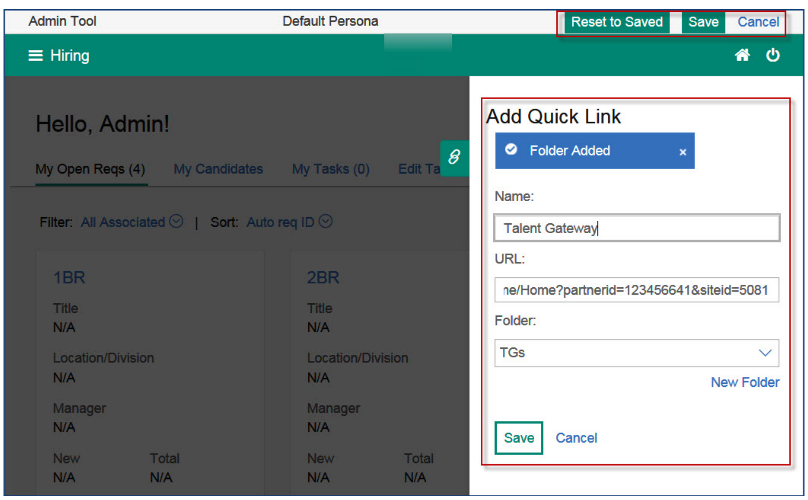


- Grid fields

- Card fields
- Quick links (including folder names)
- Tab order (First tab is set as the default tab)

The features that cannot be configured by using this screen display as inactive. Users have the





options of saving the changes that they made, reverting the changes to the previously changed status, and canceling.
RTC Internal Reference # 89017.

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