IBM: BrassRing and Onboard

BrassRing and Onboard Release Notes April 2020

Note

Before using this information and the product it supports, read the information in "Notices" on page 29.

This edition applies to the current release, and to all subsequent releases and modifications until otherwise indicated in new editions.

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Contents

Chapter 1. BrassRing and Onboard Release Notes, April 2020

This is a common Release Notes document for BrassRing and Onboard. .

Training and Enablement Sessions:

To access training and enablement sessions for IBM Talent Management Solutions and Watson Talent products (which includes BrassRing and Onboard), refer to Training and Enablement Sessions.

eLearning and User Documentation:

To access eLearning and user documentation for IBM Talent Management Solutions (which includes BrassRing and Onboard), refer to the IBM Knowledge Center.

Browser and Language Support:

- BrassRing and Lead Manager Supported Browsers and Languages.
- Onboard Supported Browsers and Languages.

Badge and Training Courses:

- BrassRing and Workbench Badge Courses.
- BrassRing Addon Training Courses.
- Onboard Training and Badges.
- Lead Manager Training and Badges.

Downloadable Release Notes:

- BrassRing and Lead Manager Downloadable PDF Release Notes.
- Onboard browser Downloadable PDF Release Notes.

BrassRing

BrassRing release features are added to this document at **US Production**.

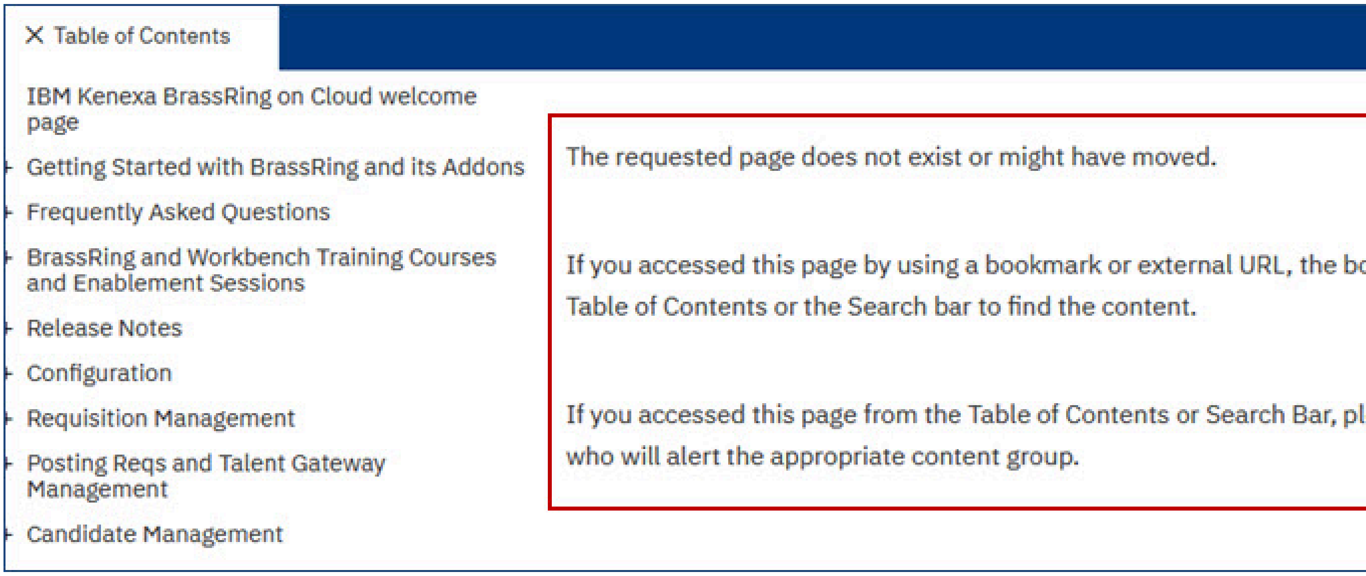
Refer to the BrassRing Welcome page on the IBM Knowledge Center for a **Pre-Release** version of the BrassRing Release Notes.

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.

IBM Knowledge Center - Broken Links

In October 2018 the BrassRing on Cloud documentation was rewritten with a new approach and structure. This rewrite resulted in the existing content being moved to different URLs. If a URL is no longer available, the message **The requested page does not exist or might have been moved.** displays.



This message does not mean that the content is not available, just that it might be available at a different location in the documentation. It is recommended that you use the Search function or Table of Contents to find the content that you need and update any existing bookmarks to the new content that is available.

End of Support for Classic Talent Gateways

Everything You Need to Know About Ending Support for Classic Talent Gateways

Note: Classic Talent Gateways (Full and Basic) are going to be retired on 1st June 2020. Clients that still have active classic Talent Gateways are advised to:

- Upgrade classic full Talent Gateways to the feature-rich Responsive Talent Gateways immediately.
- Upgrading Basic Talent Gateways requires creation of appropriate stand-alone Gateway Questionnaires.
- Deactivate any existing classic Talent Gateways that are no longer in use.

Competition for top candidates is fierce and **research has shown that employees designated as high-potentials are especially attracted to searching and applying for jobs using mobile devices**. Our customers who moved to responsive Talent Gateways are seeing a vast improvement in candidate completion rates.

Upgrading your Classic Full and Global Talent Gateways to the Responsive, mobile-friendly experience is not only beneficial for you, it is **required** as IBM focuses on responsive design and providing a great user experience in all areas of BrassRing feature development.

Support has been discontinued for:

- Classic Full & Global Talent Gateways - as of Dec, 2017.
  - Includes: Classic Search and Classic Candidate Zone.
- Classic Job Apply (including classic Non-Gateway Questionnaire and classic Gateway Questionnaire job postings) – as of Dec, 2017.
  - Clients can no longer create (or save as new) classic Gateway Questionnaires – as of Feb, 2019.
  - Recruiters and Hiring Managers can no longer post jobs without Gateway Questionnaires – as of Feb, 2019.
- Classic Candidate Portal – as of Dec, 2018.
- Classic Full Talent Gateway Attachments – as of Feb, 2019.

- Classic Employee Referral Functionality – as of Dec, 2018.
  - Clients must implement the Social Referral functionality to have an employee referral program on their Responsive Talent Gateways.

Support continues for (but ends on 1st Jun, 2020):

- Classic Basic Talent Gateways (such as Add candidate or Add contact).
  - However, we do have responsive stand-alone Gateway Questionnaire feature that replacing some simple external Basic Talent Gateways starting the release 19.07.15.

Note: Discontinued support means that, for these areas of classic candidate experience, IBM will not accept defects, will not test for nor guarantee accessibility and that no RFEs nor feature development will be considered, even though legacy configurations of these types may still be available for you to use.

Caution: Classic Full Talent Gateway features may be shut off at IBM's discretion.

Action May Be Required:

If you haven't already, we require that you upgrade any Classic Full or Global Talent Gateways to use the responsive candidate experience and that you complete HR Status Category mapping (which is required for candidates to access the Application Details page, including posted Offers, Documents and Forms [i.e., responsive candidate portal).

Want to get started on the IBM Responsive Candidate Experiences but don't know where to start? Watch our Responsive Apply Overview and Configuration Webinars to understand who should be involved, an example project timeline, configuration instructions, and much more! IBM has also hosted multiple sessions on Migrating to the Responsive Talent Gateways. Check out the recordings on our Training and Enablement site. You can also reach out to your IBM Kenexa Representative with any questions or concerns.

Client Training and Enablement Sessions

Please join the IBM Talent Management Solutions Training team for our regularly scheduled Training and Enablement sessions. These sessions may include release information, product demonstrations, implementation processes, and so much more!

Visit our site often for the most up-to-date schedule and agenda topics!

Enhancements - You Asked We Listened

We are proud to inform that this build introduces a number of features that were developed in response to clients' **Request for Enhancement (RFEs)**. IBM Kenexa is pleased to deliver these features in response to your responses and comments.

Requests For Enhancement (RFEs)

The following features were delivered in response to **RFEs**.

- Speed browse features for candidate forms is available in the production environment with this release.
- Talent Gateway job search facets are enhanced. When there are more than three options in a facet; Text boxes are displayed to key in search criteria and facets can be collapsed.
- Lead Manager - All pages now have a quick search option.
- **Forms to View** field is an auto complete field now.

Dark Launch Features

Dark Launch features are those features that are released to Staging environment - Only and are NOT released to 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 via the discussion forums for which links are provided in respective feature articles.

There are no Dark Launch features in the current release.

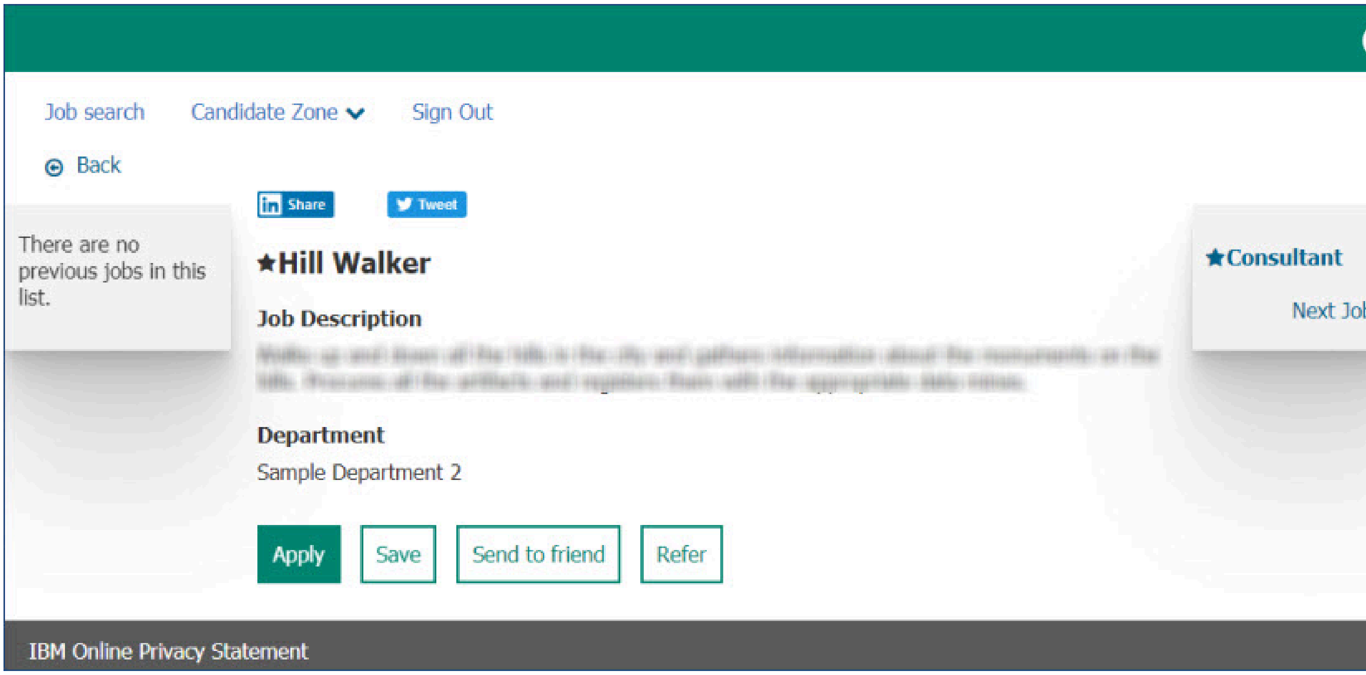
Visible Changes

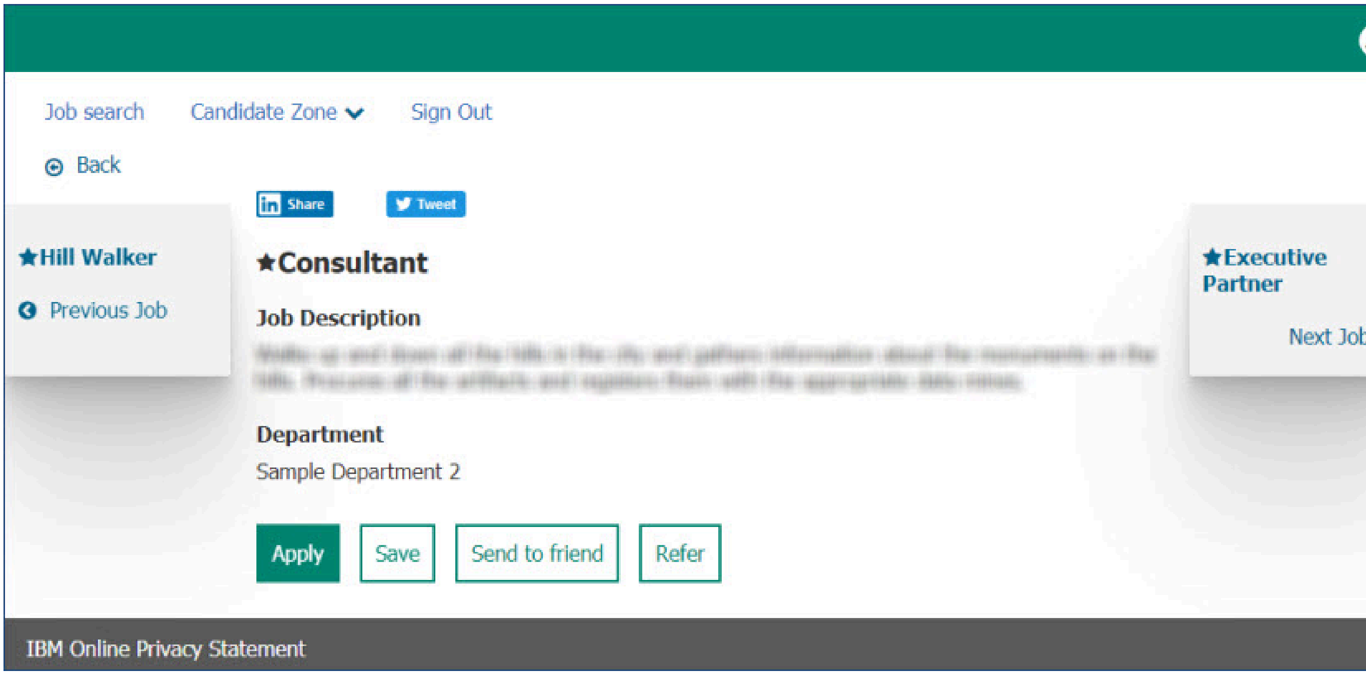
The current release of IBM Kenexa® BrassRing® on Cloud includes the following visible changes for BrassRing and IBM Kenexa Lead Manager.

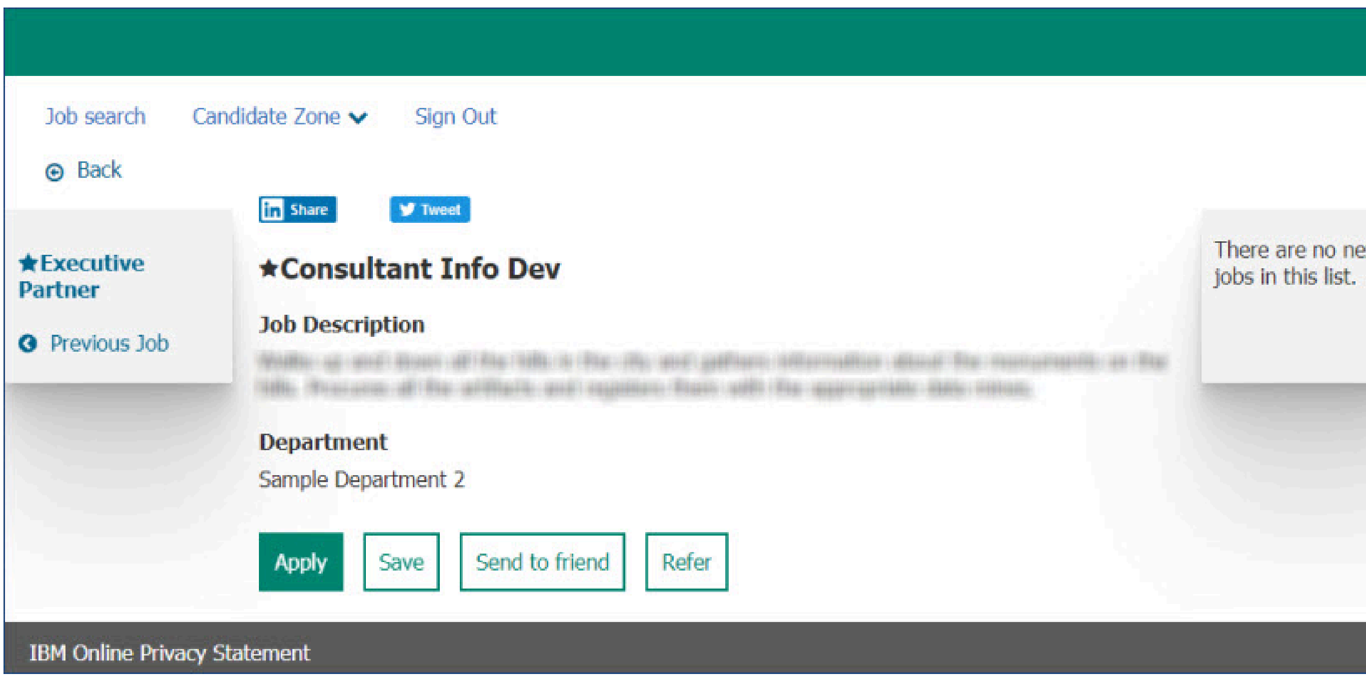
Talent Gateways - Scroll Through Job Lists

When candidates go through the job search results, after they go through each job, they need to go back to the results page to go to the next job. To improve candidate experience, starting this release, the job details page displays links **Previous Job** and **Next Job** on both sides along with the job title of the previous and next job in the list. When accessed by using a laptop or a desktop, candidates see Job card views on the previous and next cards. When candidates access the Talent Gateway by using a mobile device or a tablet, they see links of previous and next jobs.

Candidates can scroll through the positions without having to go back to the search results page. The first req in the list does not have the previous job and the last req in the list does not have a next job link.





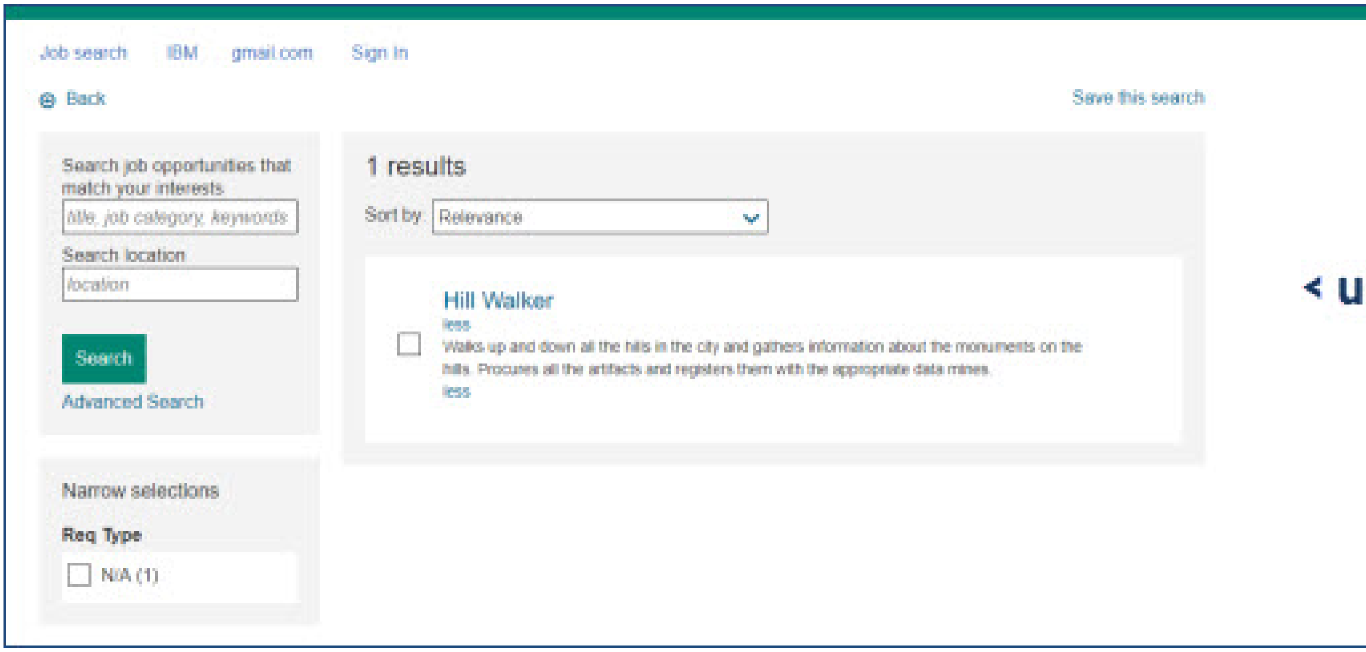


RTC internal reference # 125790.

Talent Gateways - Search Results Screen Width

Before this release, when candidate search for jobs, the search results were displayed only to a restricted extent of the screen on laptop or desktop computers. Starting this release, the results are displayed to the complete screen width. Similarly, the Search results bar that displays facet filters is expanded. The Featured jobs screen on the Talent Gateway home page is also expanded to the maximum screen space available on the screen.

Before this release:



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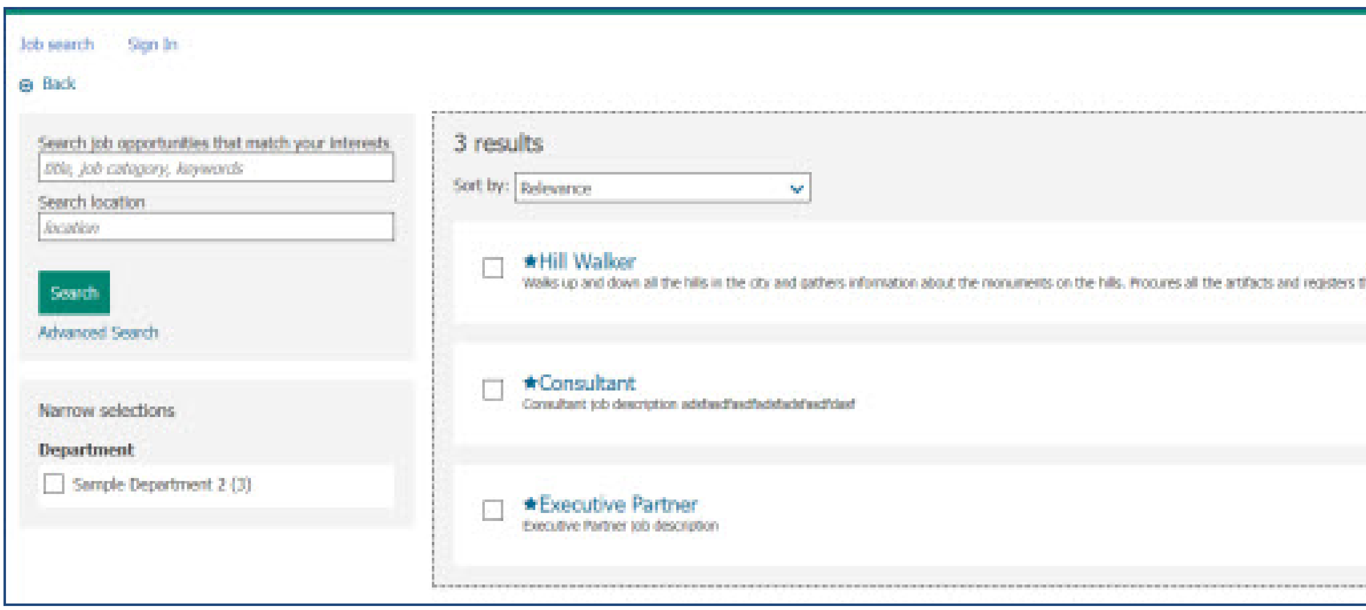
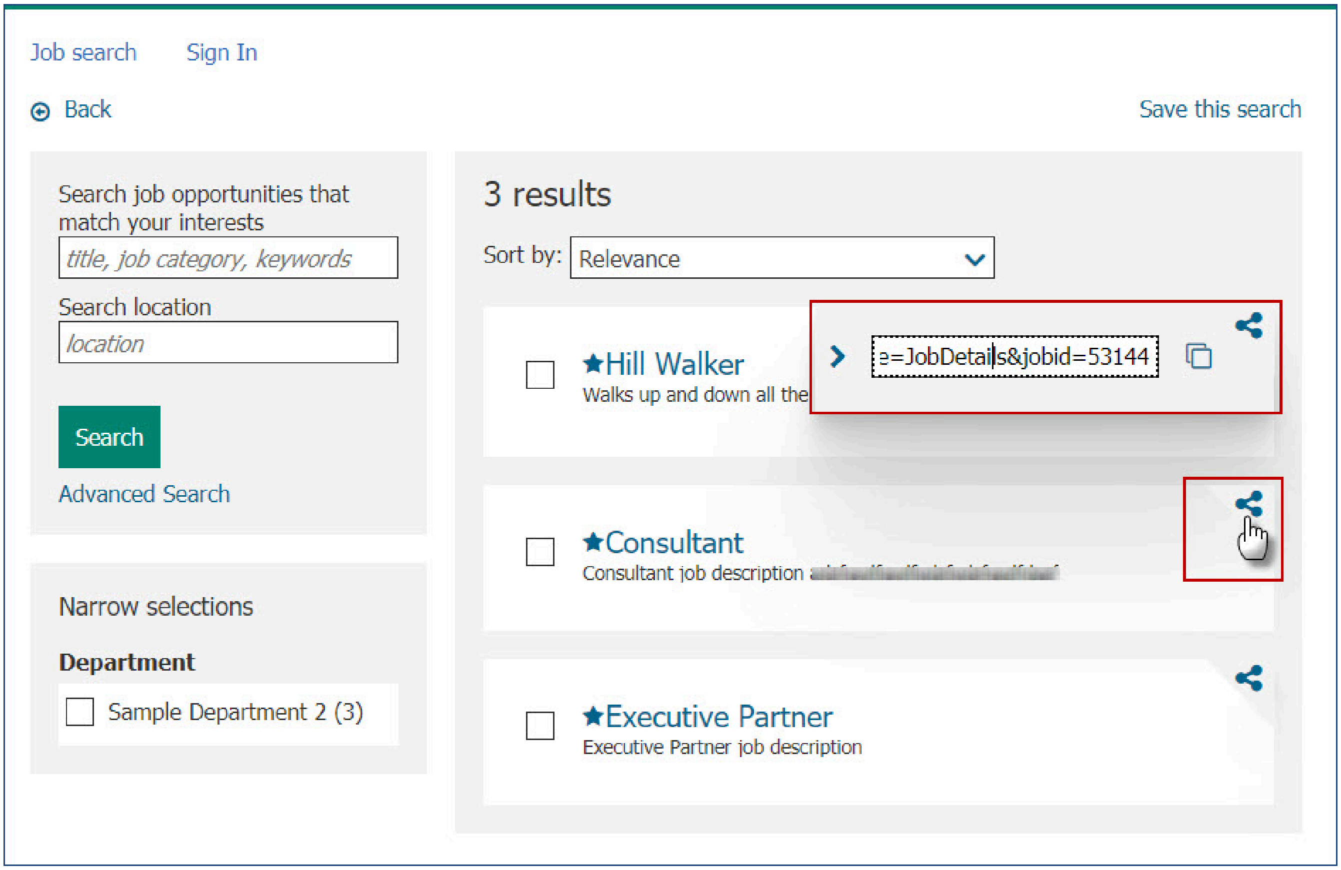


Note: This change does not impact the candidate experience when the Talent Gateway is accessed from a mobile or tablet device. This change is for laptop and desktop users only.

RTC internal reference # 128088.

Talent Gateways - Search Results New Icon

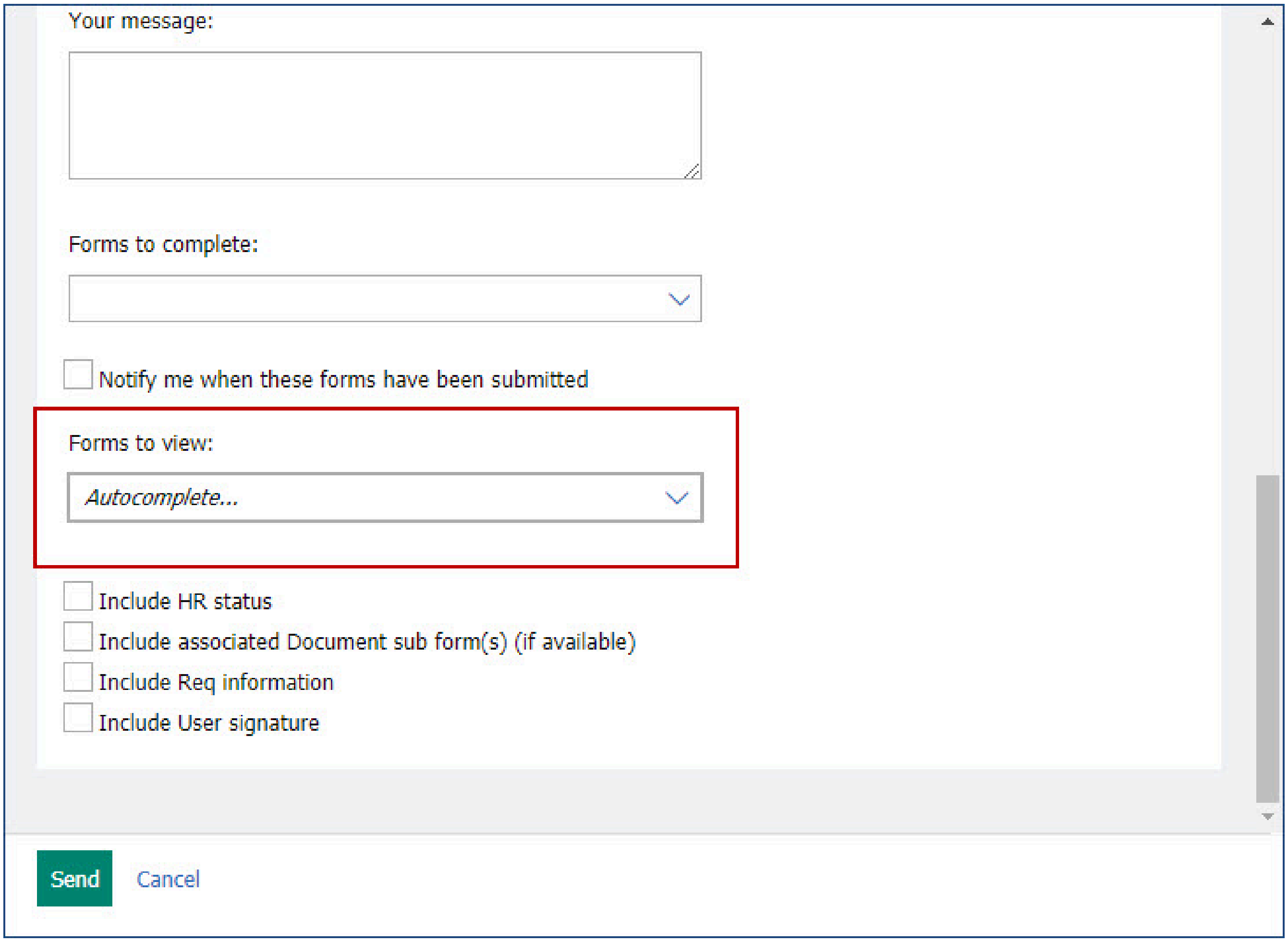
A new share icon is displayed on the job cards in Talent Gateway search results page and the featured jobs. When candidates select this icon, the Talent Gateway URL is displayed along with a copy icon. Candidates can copy the URL to the device's clipboard and share it as required. This option is not available for SSO Talent Gateways.



RTC internal reference #128089.

eLinks - Forms to View Field Enhancement

The **Forms to View** field in the Send eLink screen is now updated to be an auto complete field from a regular drop-down field that used to display up to 200 forms. BrassRing users can now enter the first three letters of the form name to narrow the search.



RTC internal reference # 128093.

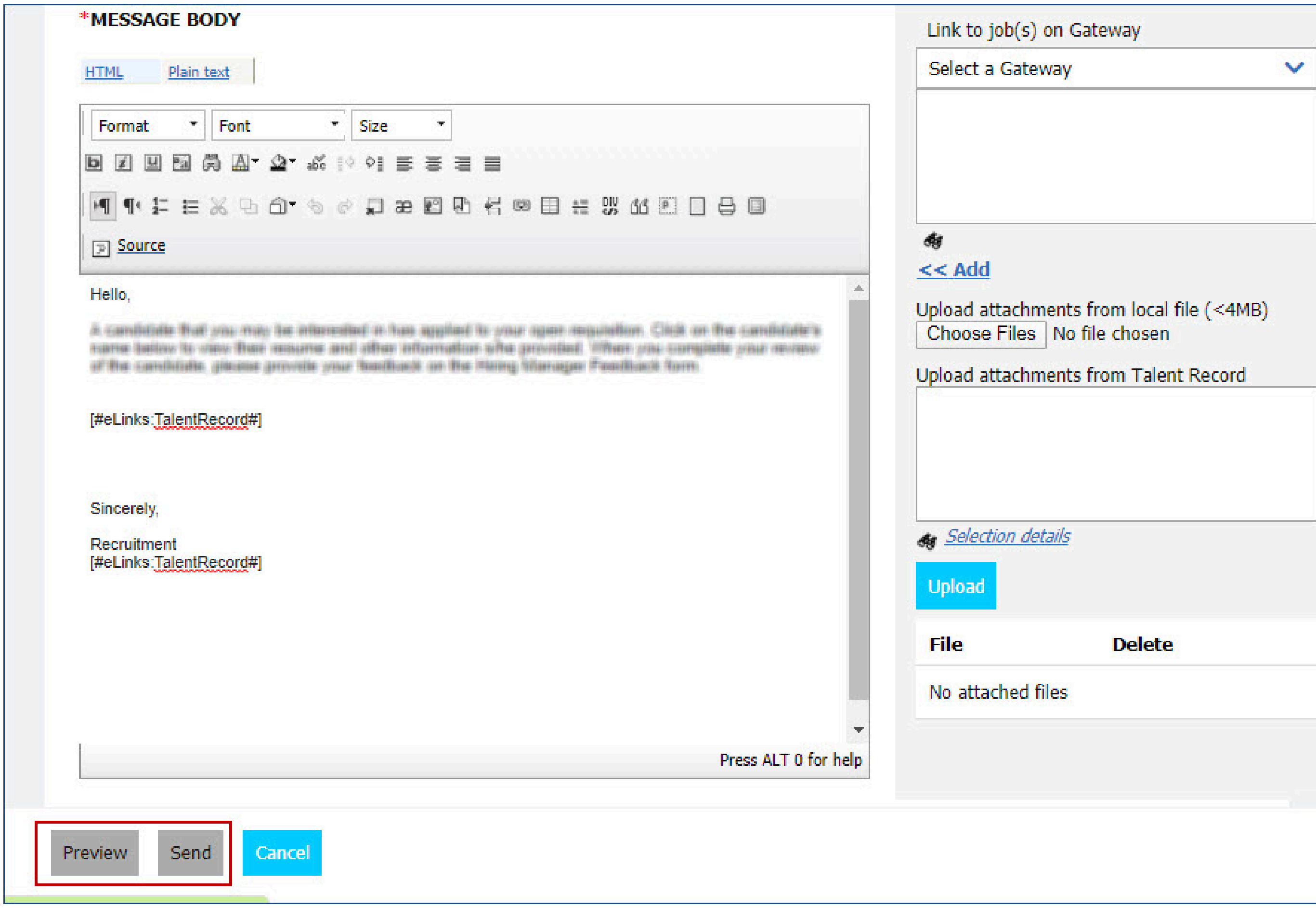
Forms History PDF - Hidden Field Display

It was observed that Form History PDF fields are being visible to a user with a user type that does not have appropriate view privileges. This anomaly was observed to happen when a user with a user type that has privileges to view the fields that are logged out of the system and immediately the user without the privileges that are logged in. This behavior is addressed and information is visible only to users with user types that have appropriate privileges.

RTC internal reference # 128215.

Communications - Send Button Inactivation

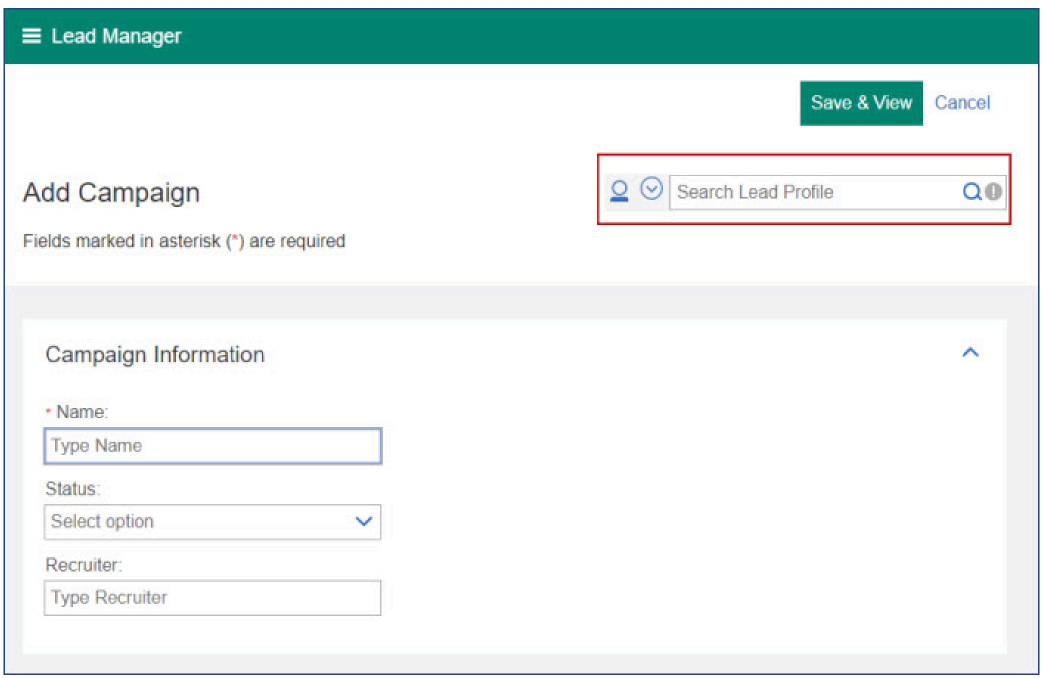
Previously, when a BrassRing user sends a communication from the communications module, the send button was still available. Users might select the button multiple times and the communications were sent multiple times to the recipients. Starting this release, the Preview and Send buttons are disabled after the user selects it once.



RTC internal reference # 128562.

Lead Manager - Quick Search

Starting this release, a Quick search option is available on all Lead Manager pages except for Send Candidate Communications pages. Lead Manager users can perform a search from any page without having to go to the home page for running a search.

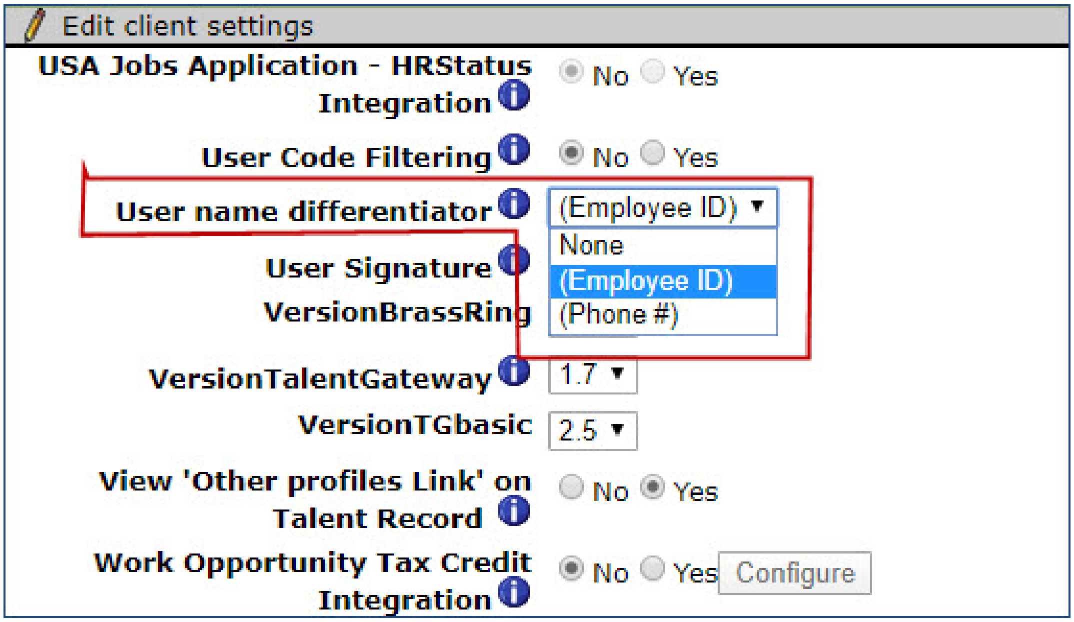


RTC internal reference # 127460.

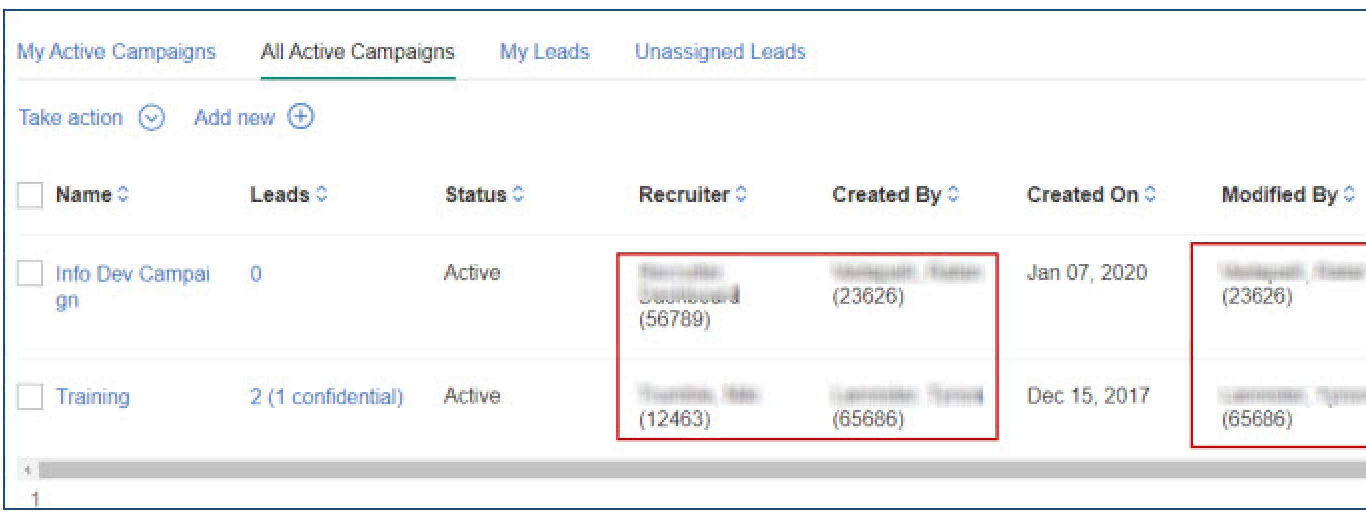
Lead Manager - Username Differentiator

In BrassRing, a username differentiator is displayed next to the usernames based on a client setting configuration. This feature helps identify and differentiate between different users with same names. Starting this release, this feature is extended to Lead Manager. This feature works based on the same client setting configuration that is applied to BrassRing.

Client setting



Username differentiator:



RTC internal reference # 81140.

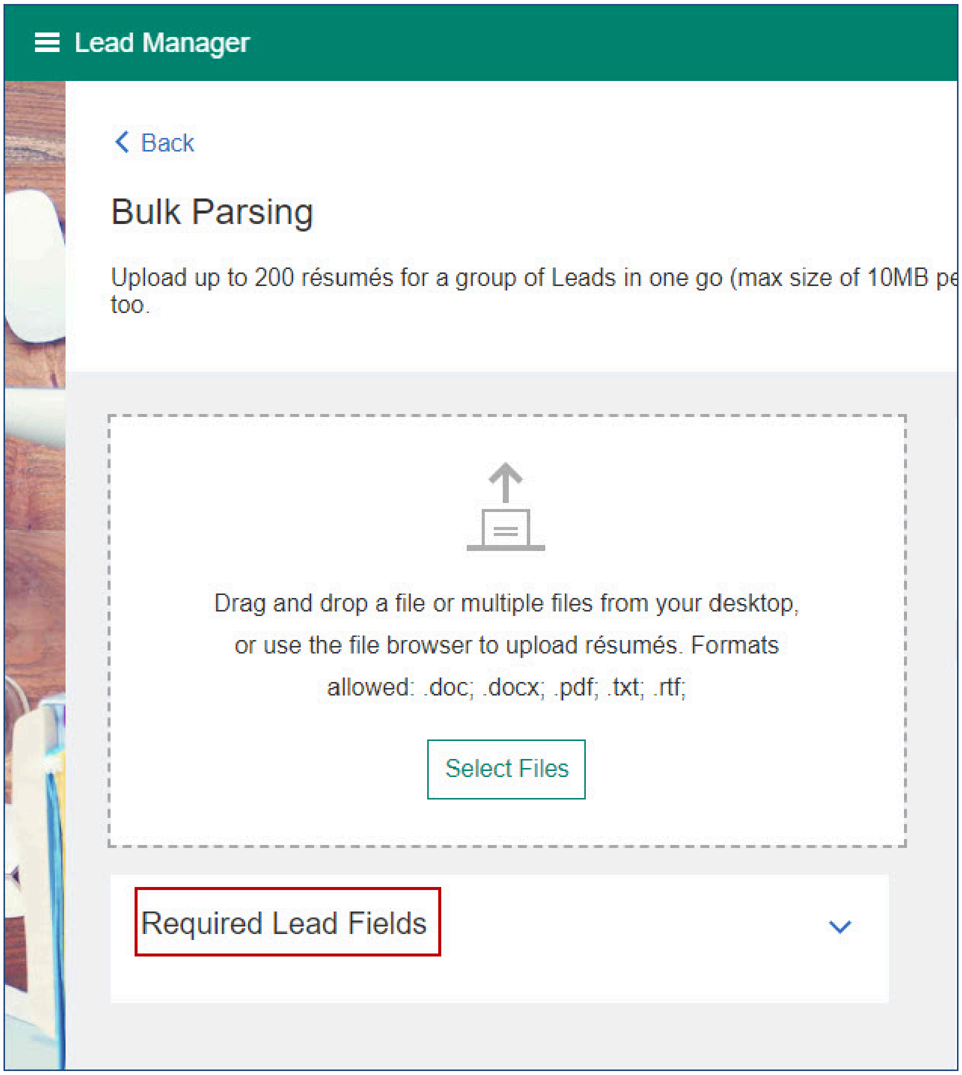
Lead Manager - Bulk Parsing Enhancement

When bulk parsing was resumes in Lead Manager, a new section that is called **Required Lead Fields** is added. With this enhancement, the custom required fields are going to be displayed in the Bulk parsing page.

These fields must be added in the Work Bench path: **Workbench** > **Tools** > **Lead Manager** > **Administer Lead Fields** and must be marked mandatory for the required user type. They would then show up in the Bulk Parsing screen under the Required Lead fields.

It is also important to note that if the original lead has data in any required custom lead field, any bulk parsing workflow for required custom lead fields does not overwrite that data. If the original lead has no data, the field is updated from data entered on the Duplicate Review page or the Error Review page only, not from the bulk parsing import page.

The data that is entered in this section is applied to all the leads that are parsed in the bulk parse. By using this feature, lead manager users can avoid going through error logs.



RTC internal reference # 69957.

Lead Manager - Search Filter Enhancement

It was observed that when filters are applied to narrow down a search, and results are obtained, if the users select the back button, the filters are not retained. Starting this release to improve user experience, this behavior is fixed and filters applied during a search are retained.

RTC internal reference # 128344.

Lead Manager - Zap Info API Integration

Zap Info is a third-party vendor that provides API integration services for Lead Manager. Here is a **tutorial** on how to add external leads to Lead Manager by using the Zap Info API integration.

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.

Speed Browse - Forms

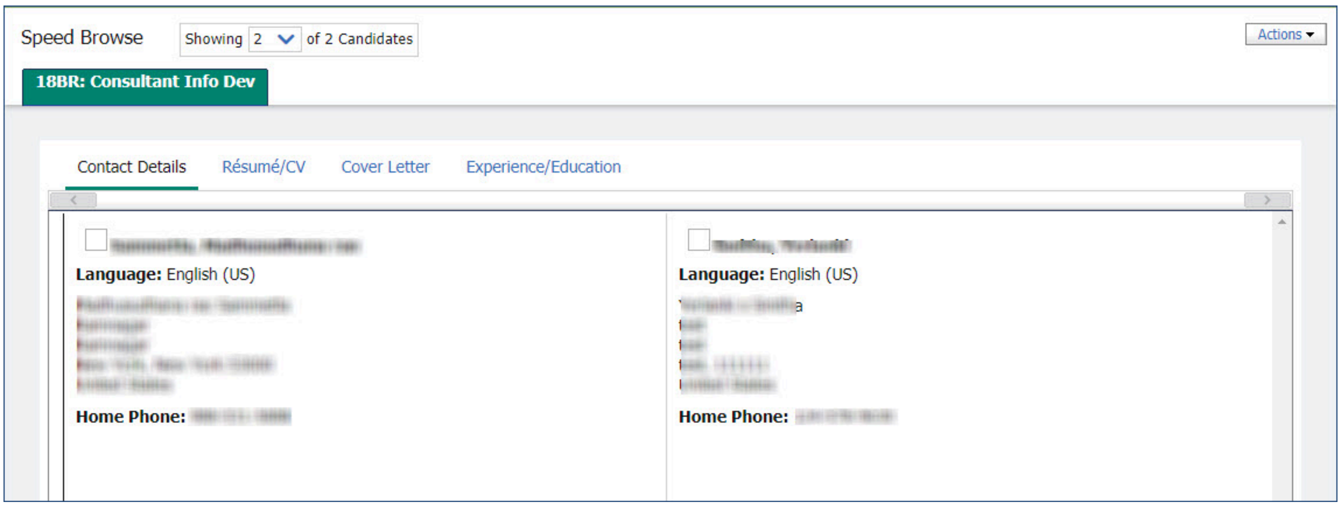
Note: This feature was deployed to Staging environment - Only during the March release (R 20.03.09). This feature is going to be available in the Production environment during the current release.

The Speed Browse feature in BrassRing allows users to compare candidate Talent Records and taking various actions when they go through different sections of the Talent Record. Starting this release, the Candidate forms are available under the Speed Browse feature. Using this feature, BrassRing users that have appropriate privileges can work on the forms.

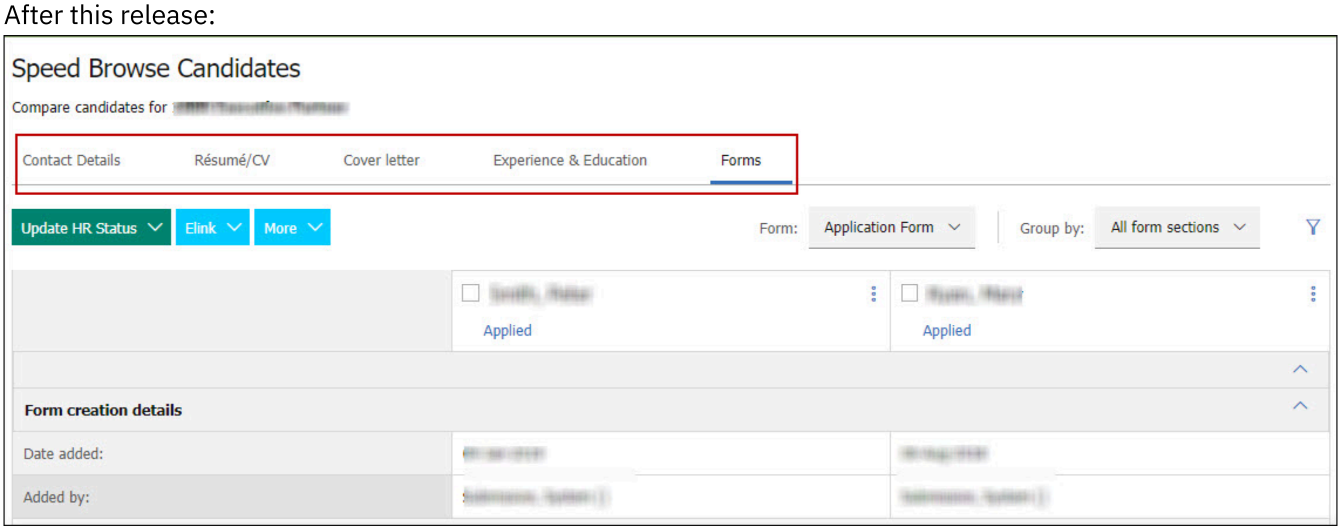
If the selected candidate does not have the required forms, the candidate is excluded from Speed Browse.

When candidates with multiple forms are selected, the latest form is opened in Speed Browse.

Before this release:



After this release:

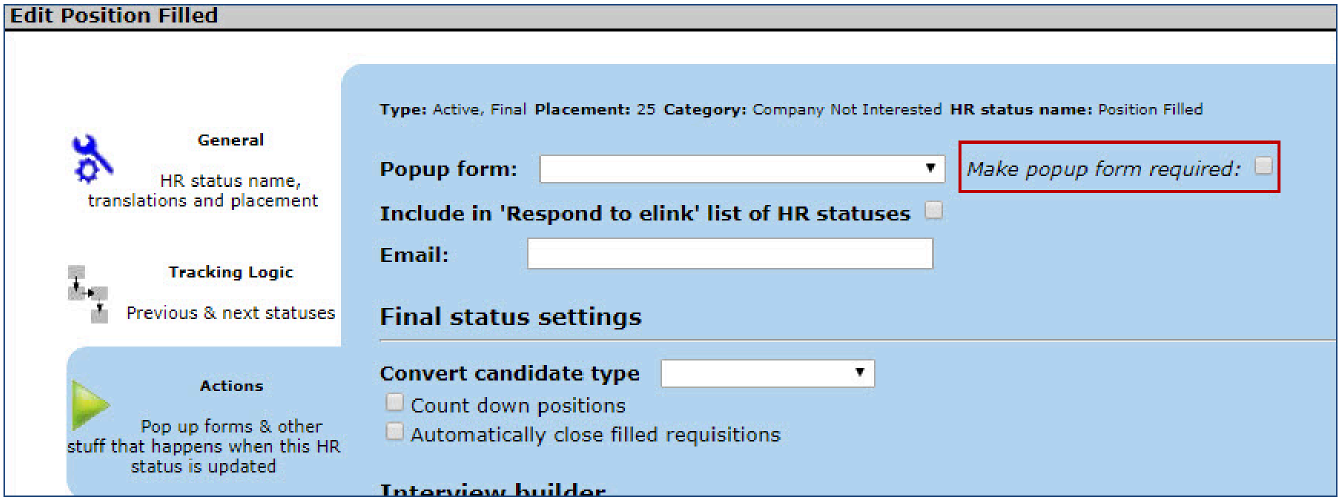


RTC internal reference # 125398.

Forms - Configuration of Required Forms

Starting this release, based on configuration, clients can make it mandatory to fill selected forms when users change a candidate's HR status.

A new workbench setting is added in the HR status settings Actions tab. **Make popup form required** is added with a check-box. Selecting the check-box after they select the form makes the completion of the form mandatory for updating the HR status for a candidate.



A message is displayed to the user that states that the completion of this form is mandatory for the HR status update to happen.

RTC internal reference # 126470.

BrassRing Workbench

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

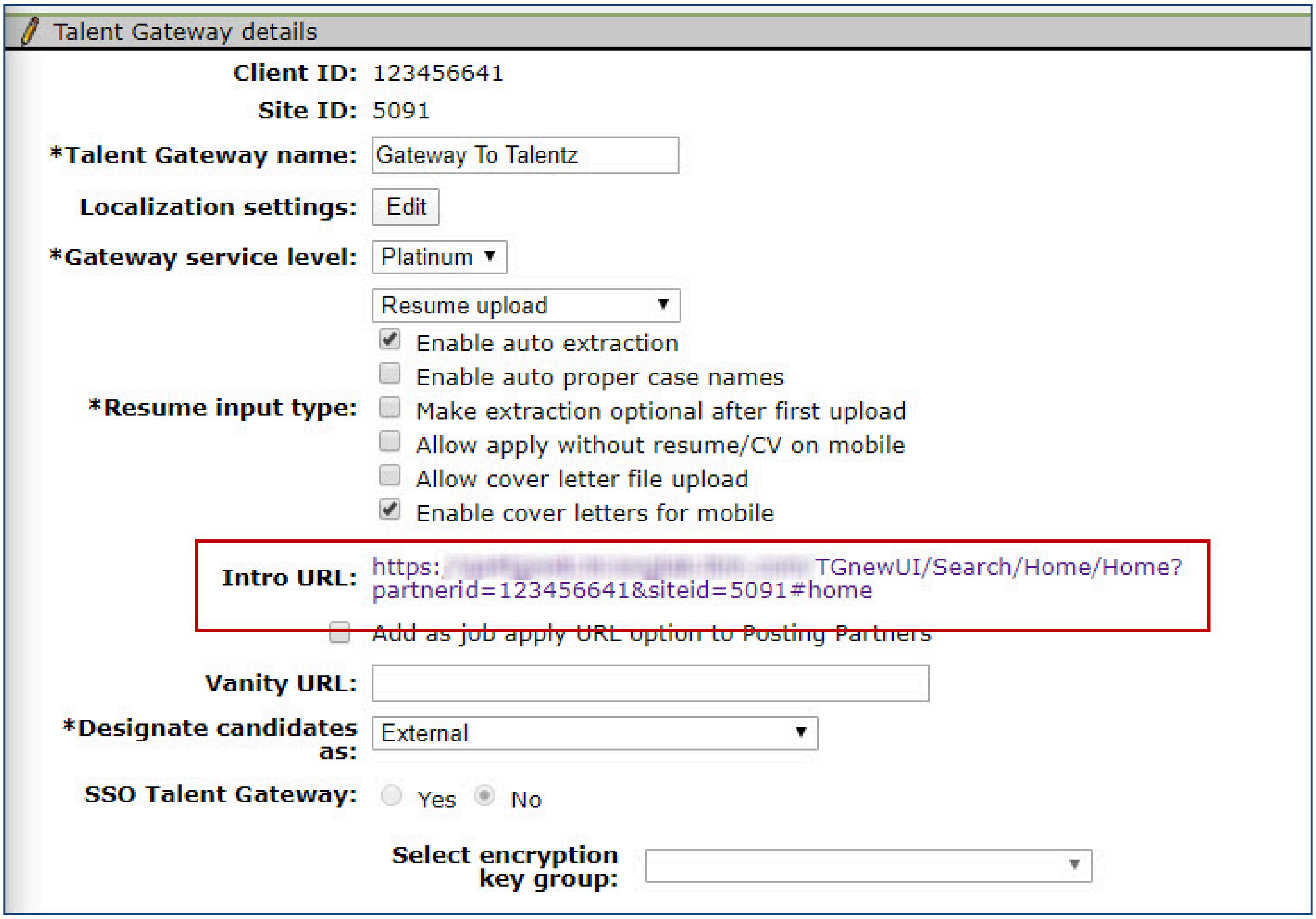
Talent Gateway - Responsive URL Handling Enhancements

Before this release, the Talent Gateway administration pages in Workbench displayed Classic Talent Gateway URLs even for Responsive Talent Gateways. Starting this release, the display format of the Responsive Talent Gateway URLs is updated. Following are the notable changes to the Talent Gateway URLs:

- The URL format for Responsive Talent Gateways is **https://[domain]/TGNewUI/Search/Home/Home?partnerid=[#]&siteid=[#]#home**
- The URL is displayed in the new format wherever a Talent Gateway URL is used, including Edit TG Details, View TG Details and the launch icons for full and global Talent Gateways.
- The new Talent Gateway URL is displayed in the new format in all Talent Gateway administration screens as a label.
- In the "Add Full TG screen", the Talent Gateway intro URL is auto-generated and is displayed in disabled mode.
- In the Edit/View screen, if the Talent Gateway is not saved as an SSO TG and has no vanity URL saved, then the TG Intro URL is displayed as an active and non-editable link.
- In the Edit/View screen, if the Talent Gateway is previously saved as an SSO TG, then keep TG intro URL as label with disabled URL.
- In Edit/View screen, if the Talent Gateway has vanity URL saved, then display the TG intro URL as label with inactive URL.
- If Talent Gateway has a Vanity URL, the same URL is used for launch TG function.
- If the Talent Gateway has a saved Vanity URL, the field's value is displayed as a link in View TG details page.
- Vanity URLs in the Add/Edit Talent Gateway Details screens have no changes. They are displayed in editable text boxes.

The current update does not impact the following types of the Talent Gateways:

- Classic Talent Gateways (Basic and Full Talent Gateways) - **No Longer Supported**, convert to responsive or deactivate these Talent Gateways.
- Global Talent Gateway (Group add/edit page)



RTC internal reference # 116230.

Gateway Questionnaire Activation - Too Many Widgets/Options - Warning Messages

When a Workbench user tries to activate a Gateway Questionnaire with over 500 widgets, a warning message is displayed starting this release. A message stating: **This Gateway Questionnaire contains more than 500 widgets. Activation of such GQs might be delayed or may even fail. If in case you encounter any issues, please consider reducing the number of widgets or reach out to your IBM support personnel.** is displayed to caution the user.

Similarly, when a Workbench user activates a Gateway Questionnaire with a widget that contains over 50,000 options, a warning message is displayed. A message stating **This Gateway Questionnaire has at least one widget with more than 50K options. Activation of such GQs might be delayed or may even fail. If in case you encounter any issues, please consider reducing the number of options on the widgets or reach out to your IBM support personnel.** is displayed to caution the user.

The warning message is displayed along with Continue and Cancel buttons. If the user selects Continue, they proceed to the Gateway Questionnaire activation. Selecting Cancel cancels the activation process.

RTC internal reference # 126612.

Export Users Report - New Column

The BrassRing engineering team receives many client requests for a report that provides User IDs of all the BrassRing users. Therefore, the User ID is added as a new column in the Export user report in Workbench. Clients can export the users list from Workbench and this report provides the user ID information for all BrassRing users with that client.

Before this release:

	A	B	C	D	E
1	User name	Status	Last name	First name	Country/Region
2	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
3	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
4	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
5	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
6	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
7	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
8	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
9	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

After this release:

	A	B	C	D	E	F
1	User ID	User name	Status	Last name	First name	Country/Region
2	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
3	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
4	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
5	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
6	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
7	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
8	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
9	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

RTC internal reference # 128137.

Onboard

Client Reminders

The current Onboard release includes the following client reminders. Client reminders remind clients of recently distributed important notices and links to comprehensive documentation and training for the special features recently introduced.

This document presents changes for the **April 2020 release of Onboard**:

- Staging - April 9, 2020
- US Production - April 18, 2020

US Staging Data Center Relocation

Clients should have already received a communication from IBM about the **relocation of the US Staging Data Center**.

This effort has been postponed.

Visible Changes

The current Onboard release includes the following visible changes.

Visible changes alter the appearance or performance of the product without requiring any configuration. The changes are immediately visible or available to users.

I-9: Changes

Clients should have already received a communication from IBM about the changes made to Form I-9.

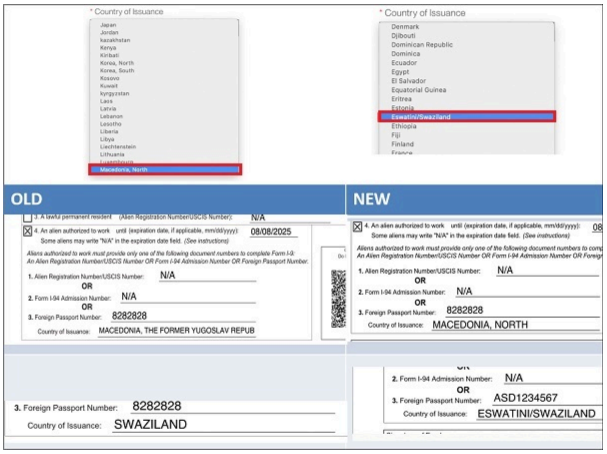
There is a FAQ on the IBM Knowledge Center that will answer the questions you may have.

Highlight of Changes

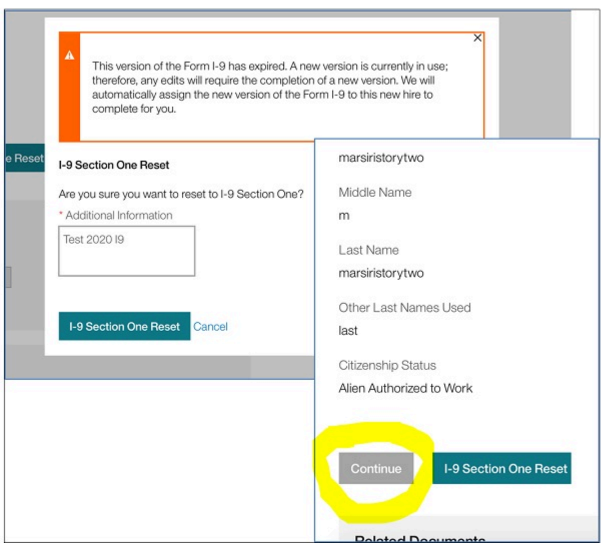
Note: E-Verify has their own way of handling I-9 changes. The following only describes use in Onboard.

Countries renamed in Country of Insurance:

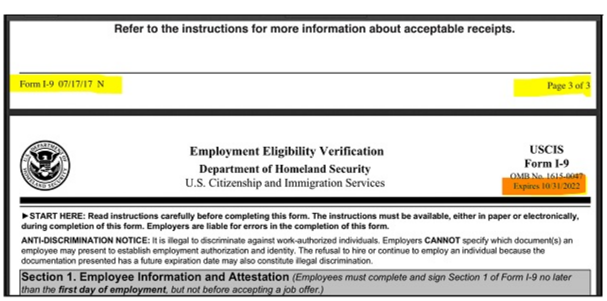
- Macedonia was renamed to Macedonia, North.
- Swaziland was renamed to Eswatini/Swaziland.



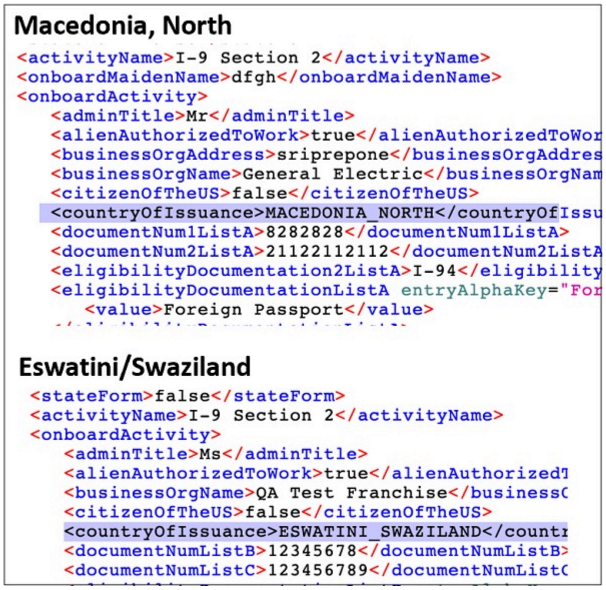
If I-9 Section 1 is already completed and I-9 Section 2 is in progress, a message about reopening Section 1 displays: *This version of the Form I-9 has expired. A new version is currently in use; therefore, any edits will require the completion of a new version. We will automatically assign the new version of the Form I-9 to this new hire to complete for you.*. The user cannot select Continue button to compete Section 2:



I-9 Section 3 for already completed Section 1 and Section 2 with OldForm:NewForm are appended to the old form:



V2 Export Value:



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Macedonia, North
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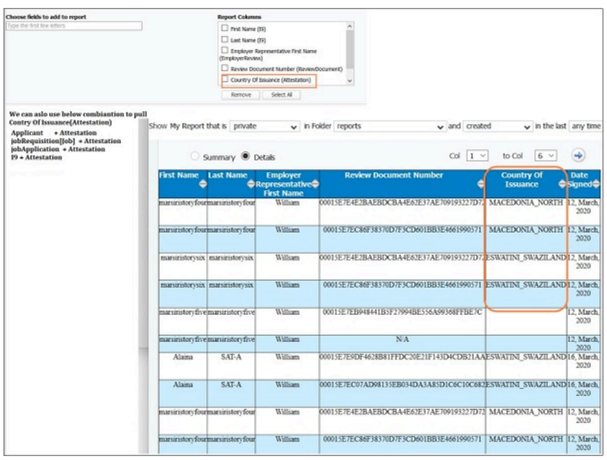
   <alienAuthorizedToWork>true</alienAuthorized1
   <businessOrgName>QA Test Franchise</businessC
   <citizenOfTheUS>false</citizenOfTheUS>
   <countryOfIssuance>ESWATINI_SWAZILAND</countr
   <documentNumListB>12345678</documentNumListB>
   <documentNumListC>123456789</documentNumListC
```

Onboard Report:



I-9 and W-4: Standard Mapping Fields

The following file contains the mapping fields.

https://media.kenexa.com/Training/TSOnboard/doc/w4_I9_mapping_fields.xls

Taiwan Country/State Label Change

Due to IBM Legal guidance, the labels/descriptions of the D_COUNTRIES and D_STATES (System Public Dictionary) were updated due to the political status of Taiwan.

Within Onboard, anywhere the standard said **Country**, it now says **Country/Region**.

The Country/Region list includes all the following options:

- China
- Hong Kong
- Macau
- Taiwan

The Chinese translation for Country/Region is: 国家和/或地区.

Within Onboard, anywhere the standard said **State**, it now says **State/Region/Province**. The current option in State/Region/Province for Taiwan Province is acceptable.

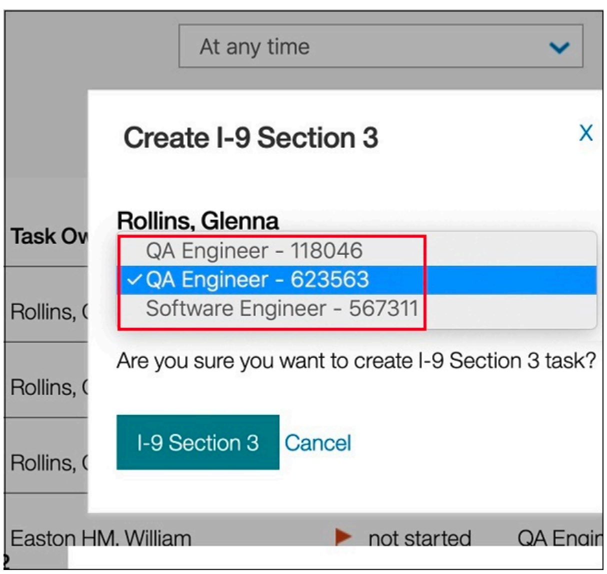
Due diligence was taken to ensure these changes do not cause downstream impacts to integrations, imports, exports, rules, and so on.

Note: There are no change in labels for I-9, E-Verify, W-4 and Stateform fields. The fields in these tasks follow the respective guidelines of the forms, hence no change. No additional countries or states were added in this area.

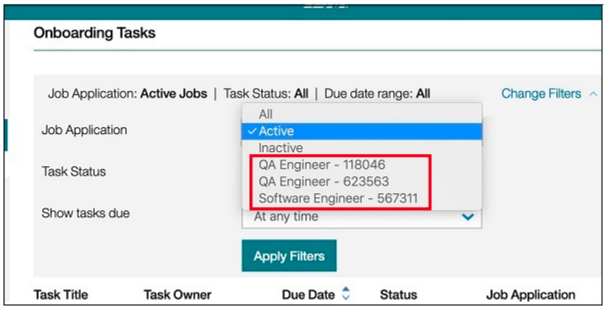
Append Requisition Number to Job Title
The requisition number is now appended to a job application title:

- When creating standalone tasks (I-9 Section 1, E-Verify, I-9 Section 3).
- In Change Filters in Onboarding Tasks page.
- In a new hire's My Task page.

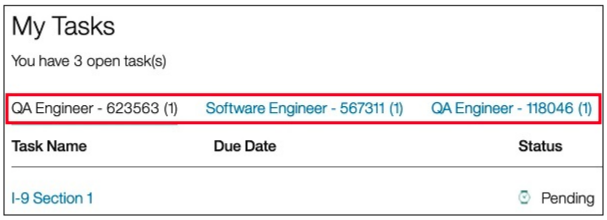
Create I-9 Section 3 standalone task - requisition number appended to job application title:



Onboarding Tasks page - Change Filters - requisition number appended to job application title:



New hire - My Tasks page - requisition number appended to job application title:



Updates to State and Federal Forms

There are updates to maintained forms.

Canada Federal TD1 - (en) and (fr)

Configurable Changes

The current Onboard release includes configurable changes. Configurable features must be configured or enabled to be visible and available to users.

Third-Party Approval Enhancement

The Third-Party Approval enhancement allows people other than the onboard manager or new hire to approve Form I-9 Section 2.

This enhancement began as a **dark launch feature**.

Overview

The Third-Party Approval enhancement allows people other than the onboard manager or new hire to approve I-9 Section 2.

USE IN ONBOARD NEW HIRE

The new hire **no longer needs to enter third-party approver details for I-9 Section 2**. These fields were removed from the interface.

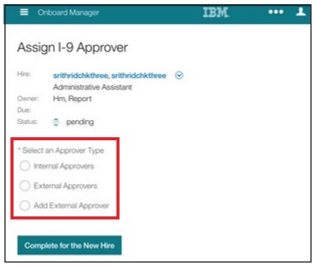
USE IN ONBOARD MANAGER

Onboarding managers are assigned an **Assign I-9 Approver** task where they can select the approver type (internal/external) for the I-9, and also add external approvers. (Note: During the dark launch, Assign I-9 Approver activity was inactive and read-only by default. Clients who need it can make it active through a maintenance ticket using DB script.)

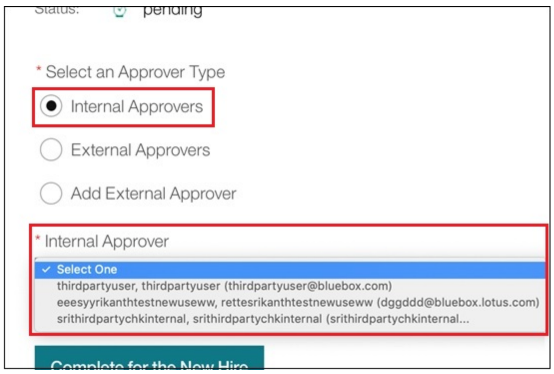
- **Internal Approvers**. This is a prepopulated list of internal third-party approvers. Note: Administrators must use the user import feature in the Admin application to do a one-time sync to give all their necessary Talent Suite users access to Onboard and assign them to the **THIRD-PARTY-USERGROUP** user group.
- **External Approvers**. This is a prepopulated list of external third-party approvers. They are not employees, but need to approve I-9 Section 2 (for example, external legal counsel). Note: All existing third-party approvers who were previously created from I-9 Section 1 are shown as External Approvers.

If clients want to move any of the approvers from External to Internal, they must create a maintenance ticket that contains the list of users who will be assigned as internal approvers.

- **Add External Approvers**. This allows users to add external approvers on the fly. Users cannot use this option to add existing employees who do not have access to Onboard.

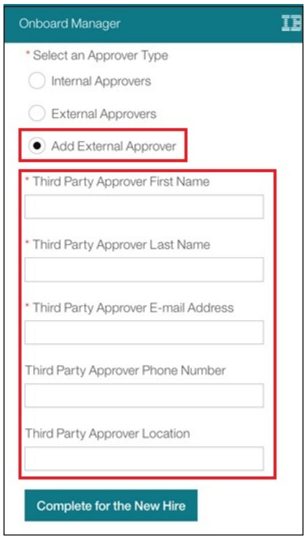


Select an Approver Type: Internal Approvers:

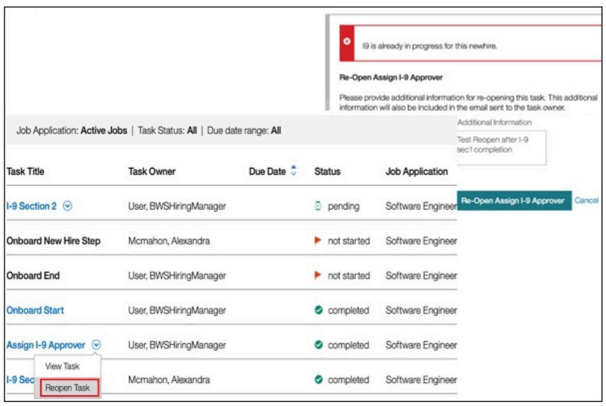


Select an Approver Type: External Approvers: Note: When an onboarding manager selects an External Approver, that person receives an email with a link to access and complete Form I-9. The approver can copy the URL into their browser and complete the form. If approvers have not used Onboard, they receive a separate email with login credentials.

Add External Approver:



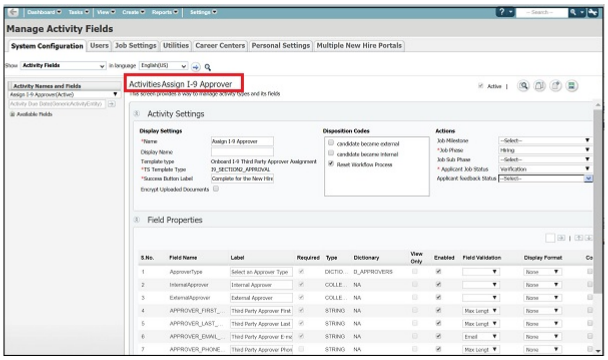
Reopen Assign I-9 Approver:



PROCESS AND CONFIGURATION

1. Transfer the responsibility of assigning a third-party approver from the new hire to the employer. This means new hires will no longer need to enter the third-party approver details in the I-9. These fields will be removed.
2. Split existing third-party approver into two new approver types: internal approvers (actual employees and existing users) and external approvers (for example, external legal counsel).
   - All existing third-party approvers that were previously created from I-9 Section 1 are shown as External Approvers.
   - If clients want to move any of the approvers from External to Internal, they must create a maintenance ticket that contains the list of users who will be assigned as internal approvers.
3. On the **Manage Activity Fields** screen, there is a new activity called **Assign I-9 Approver**. It is a standard activity like I-9 Section 1 and Onboarding US W4, so is already created and cannot be

duplicated. It allows clients to configure who the third-party approver for the respective new hire should be.



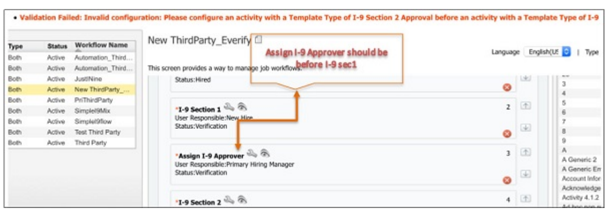
4. On the **Manage Job Workflow** screen, add a new workflow activity called **Assign I-9 Approver** into the workflow. This activity allows clients to configure who the third-party approver for the respective new hire should be.

   a. During the dark launch, the Assign I-9 Approver activity is **inactive and read-only** by default. Clients who need it can make it active through a maintenance ticket using DB script.

   b. The default task owner for this activity is: **Hiring Manager**.

   c. The **Allow Third Party I-9 Section 2 Approver** check box must be deselected to avoid the new hire entering third-party details again.

   d. The **Assign I-9 Approver workflow must precede the I-9 Section 1 workflow**. It should never be after the I-9 Section 1 workflow, but can be moved to an earlier place in the process.



   e. The **activity has three sections**:

      - **Assign Internal Approvers**: This is a prepopulated list of users who are assigned to the third-party user group. Responsible users can select a user and select Submit to assign Section 2 to that user for approval. Note: Administrators must use the user import feature in the Admin application to do a one-time sync to give all their necessary Talent Suite users access to Onboard and assign them to the **third party approvers** user group.
      - **Assign External Approvers**: This is a prepopulated list of external people who are not employees but need to approve I-9 Section 2 (for example, external legal counsel).
      - **Add External Approvers**: This allows users to add external approvers on the fly. Users cannot use this option to add existing employees who do not have access to Onboard.

5. Allow approvers to be assigned for a new hire from Brassring. Clients must pass the user name of the approver as part of the job application entity in the B-O integration. Within the XSL mapping:

   ```
   <JobApplicationEntity>
   <thirdPartyApproverName>
   <xsl:value-of select="$Onboard/*:Candidate/*:UserArea/
   *:Id[@idOwner='ThirdPartyApproverName']/*:IdValue" />
   </thirdPartyApproverName>
   ```

   a. The user must already have access to Onboard as a third-party user. Otherwise, this user is not assigned, and an error message will display during the B-O integration.

   b. Approvers can also be assigned via the V2 services.

   c. The user is assigned as an internal approver and the details are autopopulated in the approval activity. The responsible user type must review and complete the activity.

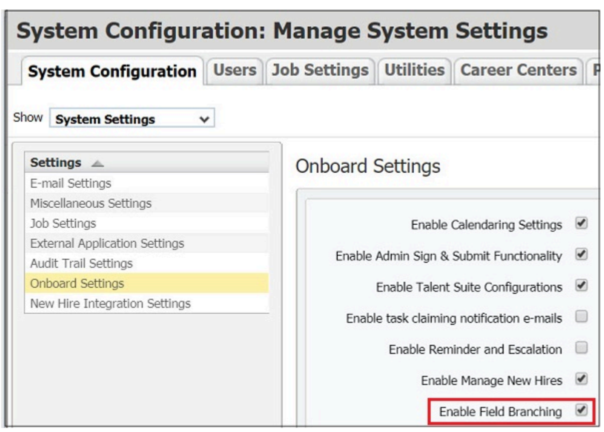
6. Add two new markers to the third-party approval communication template:
   - `<%=due.date%>`. Displays due date for I-9 section 2 approval activity to be completed.
   - `<%=new hire.startdate%>`. Displays the start date of the new hire.

Prerequisite
For the third-party I-9, a prerequisite is that **branching** must be enabled.

To do so, access the **System Configuration** tab, then in the Show statement, select **System Settings**. The **System Configuration: Manage System Settings** screen displays.

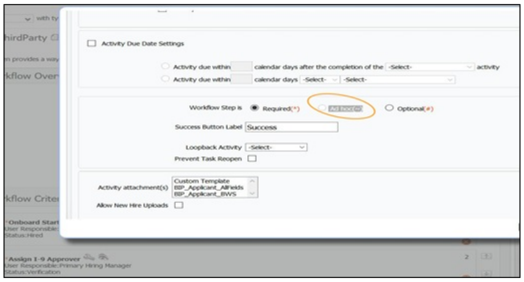
From its list pane, select **Onboard Settings**. The **Onboard Settings** screen displays.

Select the **Enable Field Branching** check box. It enables field branching, which allows only relevant fields to be displayed to a new hire based on previous answers within the same task. Note: Used with Manage Activity Fields.

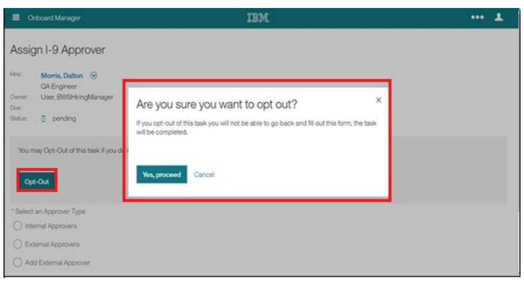


Assign I-9 Approver Task
The following provides an overview of the Assign I-9 Approver task.

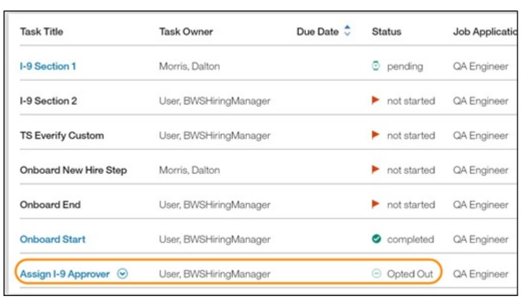
- For **Assign I-9 Approver** task:
  - The **Adhoc** workflow step option is disabled for the Assign I-9 Approver task.



  - The **Allow Third Party Approver** option is disabled if the Assign I-9 Approver is added into the workflow.
  - The **reopen of Assign I-9 Approver** task is not allowed if I-9 Section 2 is completed with receipts.
- On the **Assign I-9 Approver** page, there is an **Opt Out** button for a third-party task. If a task is opted out, the following message displays: *If you opt-out of this task you will not be able to go back and fill out this form; the task will be completed*.



Assign I-9 Approver Task - Status: Opted Out:



Task Title	Task Owner	Due Date	Status	Job Applicatio
I-9 Section 1	Morris, Dalton		pending	QA Engineer
I-9 Section 2	User, BWSHiringManager		not started	QA Engineer
TS Everify Custom	User, BWSHiringManager		not started	QA Engineer
Onboard New Hire Step	Morris, Dalton		not started	QA Engineer
Onboard End	User, BWSHiringManager		not started	QA Engineer
Onboard Start	User, BWSHiringManager		completed	QA Engineer
Assign I-9 Approver	User, BWSHiringManager		Opted Out	QA Engineer

- Change **Completed By** for a third-party task.

Reassign Approver When I-9 Section 2 Is Open
A user can **reassign/update the I-9 Section 2 approver** (either internal or external) while I-9 Section 2 is open (draft, in progress, or overdue). This is useful in scenarios where the initial approver is not able to approve or is unavailable.

Two validations were added:

- When the approval activity is reopened, the link for active/in-progress I-9 Section 2 activity in the **My Tasks** page is disabled. Once the approval activity is completed, the link is again enabled.

- When the user tries to complete I-9 Section 2, the system checks the **status** of the approval activity:
  - If approval activity exists (in the workflow) and is complete, then I-9 Section 2 is marked as complete.
  - If the approval activity exists and is not complete, then the following error message displays: *The current activity cannot be completed as a preceding I-9 approval activity has been reopened. Please contact the hiring manager and have them close the earlier activity*.

Email Markers Extended to Custom Emails

Third-party email markers can be used for custom emails.

These changes are specific to correspondences configured in Onboard.

This allows clients to create additional emails based on their business processes to either send additional notifications to third-party approvers or include third-party information to other users.

You can configure the following tags in the body of custom e-mail templates and attach them to third-party activity: Assign I-9 Approver.

- <%jobApplication.thirdPartyApprover.Third Party Approver First Name%>
- <%jobApplication.thirdPartyApprover.Third Party Approver Last Name%>
- <%jobApplication.thirdPartyApprover.Third Party Approver E-mail Address%>

These values will be populated once Assign I-9 Approver task is completed (third-party approver is already assigned).

Change to External/Internal Lists

For third-party approval, IBMers were removed from the External list and were properly listed in the Internal list.

User Type/Group

The **THIRD_PARTY_ROLE** user type is available for users who only complete third-party approvals. Any user can have a second user group called **THIRD-PARTY-USERGROUP** added, and that user will be added to the drop-down to select an internal approver.

There are some users who have no access to Onboard Manager and are only occasionally an approver. Those users can be loaded in the system with a:

- User Type of **THIRD_PARTY_ROLE**.
- User Group of **THIRD-PARTY-USERGROUP**.

Those users should be set to **ACTIVE_NO_ACCESS** for their **OB_MANAGER_ACCESS**.

Functionally, those users will not see the Onboard Manager application because of their ACTIVE_NO_ACCESS permission, and they will be available to be selected as a third-party approver because of their THIRD-PARTY-USERGROUP permission.

If such a user is selected as an approver, the THIRD_PARTY_ROLE user type toggles the user's permission from ACTIVE_NO_ACCESS to ACTIVE when the I-9 Section 2 level is open to be completed. Once the I-9 Section 2 activity is completed, the user is automatically logged out and their license access is toggled from ACTIVE to ACTIVE_NO_ACCESS.

User Type/Group Mapping from B-O Integration

This topic provides example I-9 approver user type/group coding from BrassRing to Onboard integration.

The following is the **original, typically used user type and user group code**. This is usually found near the end of the xslt file.

```
<userType>
    <UserTypeEntity>
        <userTypeName>
            <xsl:variable name="var_userType" select="usertype" />
            <xsl:call-template name="decode:userType">
                <xsl:with-param name="value" select="$var_userType" />
            </xsl:call-template>
        </userTypeName>
    </UserTypeEntity>
</userType>
 <userGroups>
     <UserGroupEntity>
         <groupName>
             <xsl:value-of select="usergroup" />
         </groupName>
     </UserGroupEntity>
 </userGroups>
```

The following is the **user type and user group code that is commented out** (not used). It uses <!-- to begin the comment and --> to end the comment.

```
<!--     <userType>
         <UserTypeEntity>
             <userTypeName>
                 <xsl:variable name="var_userType" select="usertype" />
                 <xsl:call-template name="decode:userType">
                     <xsl:with-param name="value" select="$var_userType" />
                 </xsl:call-template>
             </userTypeName>
         </UserTypeEntity>
     </userType>        -->

<!--    <userGroups>
        <UserGroupEntity>
            <groupName>
                <xsl:value-of select="usergroup" />
            </groupName>
        </UserGroupEntity>
    </userGroups>        -->
```

The following is the **user type and user group code only processed conditionally**. In this case, the user type and user group are only used if the country is not US.

```
<!--US Process for Users is handled through the TS USer import only so that I-9 Approver UGs are not overwritten.
    This code is required for non-US users-Added Jan 31 2020 JBatch-->
  <xsl:if test="$Onboard/*:Candidate/*:CandidateProfile/*:UserArea/*:Id[@idOwner='Job_Country']/*:IdValue !='US' ">
      <userType>
          <UserTypeEntity>
              <userTypeName>
                  <xsl:variable name="var_userType" select="usertype" />
                  <xsl:call-template name="decode:userType">
                      <xsl:with-param name="value" select="$var_userType" />
                  </xsl:call-template>
              </userTypeName>
          </UserTypeEntity>
      </userType>
  </xsl:if>


<!--US Process for Users is handled through the TS USer import only so that I-9 Approver UTs are not overwritten.
    This code is required for non-US users-Added Jan 31 2020 JBatch-->
  <xsl:if test="$Onboard/*:Candidate/*:CandidateProfile/*:UserArea/*:Id[@idOwner='Job_Country']/*:IdValue !='US' ">
      <userGroups>
          <UserGroupEntity>
              <groupName>
                  <xsl:value-of select="usergroup" />
              </groupName>
          </UserGroupEntity>
      </userGroups>
  </xsl:if>
```

Fixed Defects

In the current IBM Kenexa Onboard release, the following defects were addressed.

RTC Jazz Number	Defect Description
232942	TS003290279 - Manage New Hires - Vertical scroll bar not showing in Chrome (multiple clients - TS003315492).
233696	ESCALATION - TS003367083 - User is getting error when trying to run Onboard start task.
233896	TS003388926 - Append Requisition Number to Job title for Standalone task creation and Job Application (drop-down) in Change Filters in Onboarding Tasks page. Note: The requisition number is now appended to a job application title: when creating standalone tasks (I-9 Section 1, E-Verify, I-9 Section 3); in Change Filters in Onboarding Tasks page; in a new hire's My Task page.
233991	TS003402413 - Onboard status not updated.

RTC Jazz Number	Defect Description
234306	TS003427789 - Error B-22-000: Invalid value for alien_number; alien_number is required.
234605	ESCALATED - TS003470593 - WOTC Error Message (Needs RCA/Prevention Fix along with script updates.)

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