

IBM: BrassRing and Onboard

*BrassRing and Onboard Release Notes
December 2019*



Note

Before using this information and the product it supports, read the information in [“Notices” on page 11.](#)

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

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Chapter 1. BrassRing and Onboard Release Notes, December 2019

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 and Watson Talent products (which includes BrassRing and Onboard), refer to the [IBM Knowledge Center](#).

Browser and Language Support:

- BrassRing on Cloud and Lead Manager on Cloud [Supported Browsers and Languages](#).
- Onboard on Cloud [Supported Browsers and Languages](#).

Badge and Training Courses:

- BrassRing on Cloud and Workbench [Badge Courses](#).
- BrassRing Addon [Training Courses](#).
- Onboard on Cloud [Training and Badges](#).
- Lead Manager and Watson Campaign Automation [Training and Badges](#).

Downloadable Release Notes:

- BrassRing on Cloud and Lead Manager on Cloud [Downloadable PDF Release Notes](#).
- Onboard browser [Downloadable PDF Release Notes](#).

BrassRing

For December 2019, there are no release notes specific to BrassRing.

Refer to the [BrassRing Welcome page](#) on the IBM Knowledge Center for previous release notes or additional documentation.

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 **December 2019 release of Onboard on Cloud:**

- Staging - December 5, 2019
- US Production - December 14, 2019

Dark Launch Features

The current Onboard release includes the following Dark Launch features. Such features 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.

Third-Party Approval - Overview

This is a **dark launch feature**. The Third-Party Approval enhancement allows people other than the onboard manager or new hire to approve I-9 Section 2.

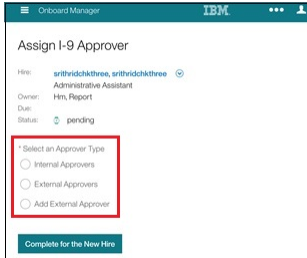
USE IN ONBOARD NEW HIRE

When this feature is enabled, the new hire will no longer need to enter third-party approver details for I-9 Section 2. These fields will be removed from the interface.

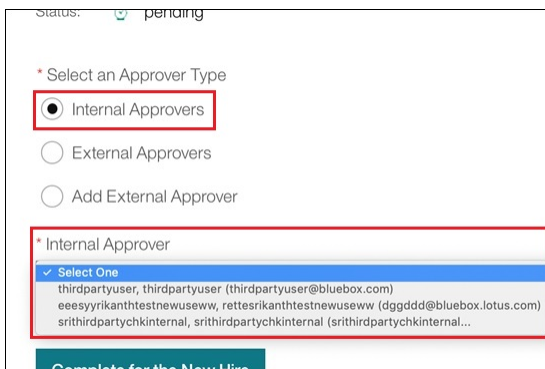
USE IN ONBOARD MANAGER

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 is 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 approvers 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.

* Select an Approver Type

Internal Approvers

External Approvers

Add External Approver

* External Approver

Select One ▼

Add External Approver:

Onboard Manager

* Select an Approver Type

Internal Approvers

External Approvers

Add External Approver

* Third Party Approver First Name

Third Party Approver Last Name

* Third Party Approver E-mail Address

Third Party Approver Phone Number

Third Party Approver Location

Complete for the New Hire

Reopen Assign I-9 Approver:

I-9 is already in progress for this new hire.

Re-Open Assign I-9 Approver

Please provide additional information for re-opening this task. This additional information will also be included in the email sent to the task owner.

Additional Information
Test Reopen after I-9 test1 completion

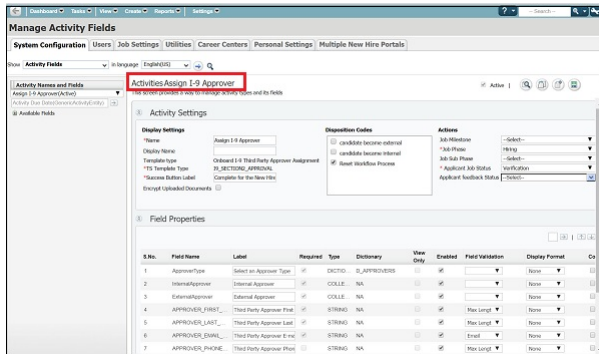
Job Application: Active Jobs | Task Status: All | Due date range: All

Task Title	Task Owner	Due Date	Status	Job Application
I-9 Section 2	User, BWSHiringManager		pending	Software Engineer
Onboard New Hire Step	McMahon, Alexandra		not started	Software Engineer
Onboard End	User, BWSHiringManager		not started	Software Engineer
Onboard Start	User, BWSHiringManager		completed	Software Engineer
Assign I-9 Approver	User, BWSHiringManager		completed	Software Engineer
I-9 Sec	McMahon, Alexandra		completed	Software Engineer

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.

- 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.



- 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.
 - 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.
 - The default task owner for this activity is: **Hiring Manager**.
 - The **Allow Third Party I-9 Section 2 Approver** check box must be deselected to avoid the new hire entering third-party details again.
 - 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.



- 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.
- 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>
```

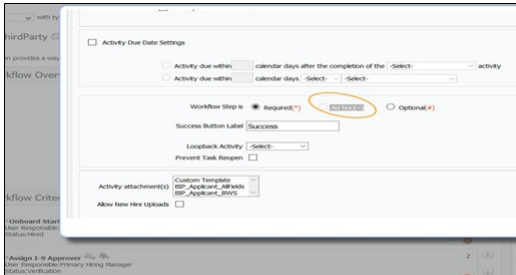
- The user must already have access to Onboard as a third-party user. Otherwise, this user is not assigned, and an error message will display during the B-O integration.

- 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.

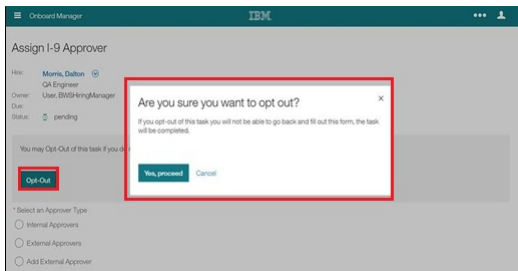
Third-Party Approval - August Enhancements

There are enhancements to Third-Party Approval.

- 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 Application
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.

Third-Party Approval - 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.*

Visible Changes

The current Onboard release includes the following visible changes.

I-9: List A Enforcement for Marshall Island and Micronesia

These changes apply to I-9 Section 2 and Section 3.

- The text *This document uses D/S rather than a date* was changed to *This document has selected value instead of an expiry date.*
- There is a drop-down with three values: D/S, CFA/FSM, CFA/MIS.
- A user can select a CFA/FSM option if Micronesia is selected as Country of Issue, and CFA/MIS if Marshall Islands are selected. If user selects any other country of issuance for CFA/FSM and CFA/MIS, the following validation error message displays: *This is not a valid option for the Country selected. Please change the country or update the expiry date with a valid option.*
- For Reporting, the following field was added in reports: No ExpirationDate Code (Review Document).

I-9: Verbiage Changes

In response to **RFEs**, there are changes to verbiage in I-9 Section 1 and Section 2.

I-9 SECTION 1

The text *Preparer Information* was changed to *Preparer/Translator Information*.

The attestation was updated to: *I attest, under penalty of perjury, that I have assisted in the completion of I-9 Section 1 of this form and that to the best of my knowledge the information is true and correct. By checking this box, I authorize my digital signature to be used on section 1 of the I-9 form.*

The verbiage for Employees with disabilities was updated to: *If you are an employee with a physical or mental impairment (placed in employment by a nonprofit organization, association, or as part of a rehabilitation program) who cannot produce a photo identity document for employment eligibility and require assistance of a representative, parent, or legal guardian to complete the Form I-9. **Please read** - Representatives, parents, or guardians assisting an employee with a disability(s), have special procedures for establishing identity if they cannot present an identity document of the employee for Form I-9. The special procedures include (1) The representative and employee will agree that this system will populate Section 1 of the electronic Form I-9 with the information that is entered into the system (2) The representative and employee will agree that this system will populate the **Employee Signature** field with the phrase "Special Placement". When the representative, clicks on the **Sign and Submit button**, I understand that by doing so, I confirm that I want to sign the Preparer and/or Translator Certification part of the electronic Form I-9. Please see Handbook for Employers: instructions for Completing form I-9 (M-274) on www.uscis.gov/I-9Central.*

The *Terms and Conditions* language in Step 1 was changed to *Preparer/Translator Section*.

The verbiage for *Minors* was changed to: *If you are under the age of 18 and cannot produce a photo identity document for employment eligibility; then you must have a parent or legal guardian assist in*

completing Section 1. The special procedures include (1) The parent or legal guardian, agree that this system will populate Section 1 of the electronic Form I-9 with the information that is entered into the system (2) I, the parent or legal guardian, agree that this system will populate the **Employee Signature** field with the phrase "Minor under Age 18". If I, the parent or legal guardian, click on the **Sign and Submit button**, I understand that by doing so, I confirm that I want to sign the Preparer and/or Translator Certification part of the electronic Form I-9. Also read - Parents or legal guardians assisting minors (individuals under 18) have special procedures for establishing identity if they cannot present an identity document for Form I-9. Please see Handbook for Employers: instructions for Completing form I-9 (M-274) on www.uscis.gov/I-9Central."

I-9 SECTION 2

The receipt pop-up message was updated to: *I confirm that the individual presented an original receipt of a lost, stolen, or damaged document. The original replacement document must be presented to the Company within 90 days.*

The text *Please check the date entered or provide another document with a valid expiry date* was changed to *Please correct the date or request that the employee present an alternate, unexpired document.*

The text *Employer Information in Section 2 (Step 3)* displays after *First Name and Last Name of Employer or Authorized Representative.*

For Electronic Signature in Section 2 (Step 4), the text *The completion of this task requires your signature. Please use the space below to draw your signature or upload an image file of your signature. The signature provided on this step will be applied to the generated PDF document* was changed to *The completion of Section 2 of Form I-9 requires your signature. Please use the space below to draw your signature or upload an image file of your signature. Your signature entered here will appear on the Signature of Employer or Authorized Representative field of Section 2 of Form I-9.*

The signature step follows the Administrator's review of the form.

E-Verify: New Update Case

There is a new implementation for Update case (edit case).

When an E-Verify case is in DRAFT status (Other), the Reopen I-9 link displays two buttons:

- Submit E-Verify OR Update Case
- Close

Whenever I-9 is reopened from E-Verify draft status, the **Update Case** button displays.

The **Submit E-Verify** button displays immediately after draft case creation OR once the update case is called after completing the reopened I-9.

By the time the case is updated, if the case is overdue, the overdue reason displays.

E-Verify: Eligibility Status Added to Audit Report

An E-Verify **eligibility status** statement was added to the **audit report** as a column and a filter.

Configurable Changes

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

I-9/E-Verify: New Standalone Task Specific to Job Application

For this release, an I-9/E-Verify standalone task was created specific to job application.

USE IN ONBOARD MANAGER

In **Onboard Manager**, the following tasks display:

- **I-9 Section 1_Standalone** task
- **E-Verify_Standalone** task

If an onboarding manager selects a job application title that does not have a completed I-9 Section 2, then the following error message displays: *Standalone task cannot be created as Job does not have a completed I-9.*

E-Verify Standalone task:

Hire	Position Start Date	Requisition Number	User Name
Acos, Charis QA ANALYST I		629018	newhire8917CylLaJZ

Task Title	Task Owner	Due Date	Status
E-Verify_Standalone	Hiring Manager	Aug 11, 2019	overdue

Resulting E-Verify Standalone task screen:

E-Verify_Standalone

Hire: **Acos, Charis**
QA ANALYST I

Owner: Hiring Manager

Due: Aug 11, 2019

Status: **overdue**

Duplicate Case
?DUPLICATE_CASE_INSTRUCTION_VTHIRTY? ?DUP

Fields marked with an asterisk (*) are required.

[+ Show Existing E-Verify Cases with the same SSN](#)

Initiate Everify Results

Case Number
2019220142541BA

Case Action
Initiate Everify

Case Status
Duplicate Case

[+ Show case history](#)

CONFIGURATION

In **Onboard Configuration**, a **Show All Job Application Titles** option does all validations while creating a standalone task for I-9/E-Verify.

Fixed Defects

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

RTC Jazz Number	Defect Description
226141	ESCALATED - TS002750613 - Unable to save workflow changes.
228169	TS002907512 - Manage New Hire E-Verify reporting gap for viewing case results V30.
228889	TS002921109 - Req# 2178996216182 (For both Section 2 & Section 3).
228891	TS002958811 - I-9 Section 2 - B-22-000: Invalid value for reason_for_delay_code; reason_for_delay_code is required. TS002966067
229175	TS002945267 - Onboard Zipcode validation is not allowing candidate export process successfully.
229698	TS003014425 - Unable to open standalone E-Verify task
229900	TS003026080 - S-1-001 Manage New Hire Discontinue Error.
230200	TS003039164 - Onboard start did not auto complete.
230396	TS003062401 - Unable to complete E-Verify activity case closed.

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