IBM: BrassRing and Onboard

BrassRing and Onboard Release Notes January 2020

Note

Before using this information and the product it supports, read the information in "Notices" on page 37.

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, January 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 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

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

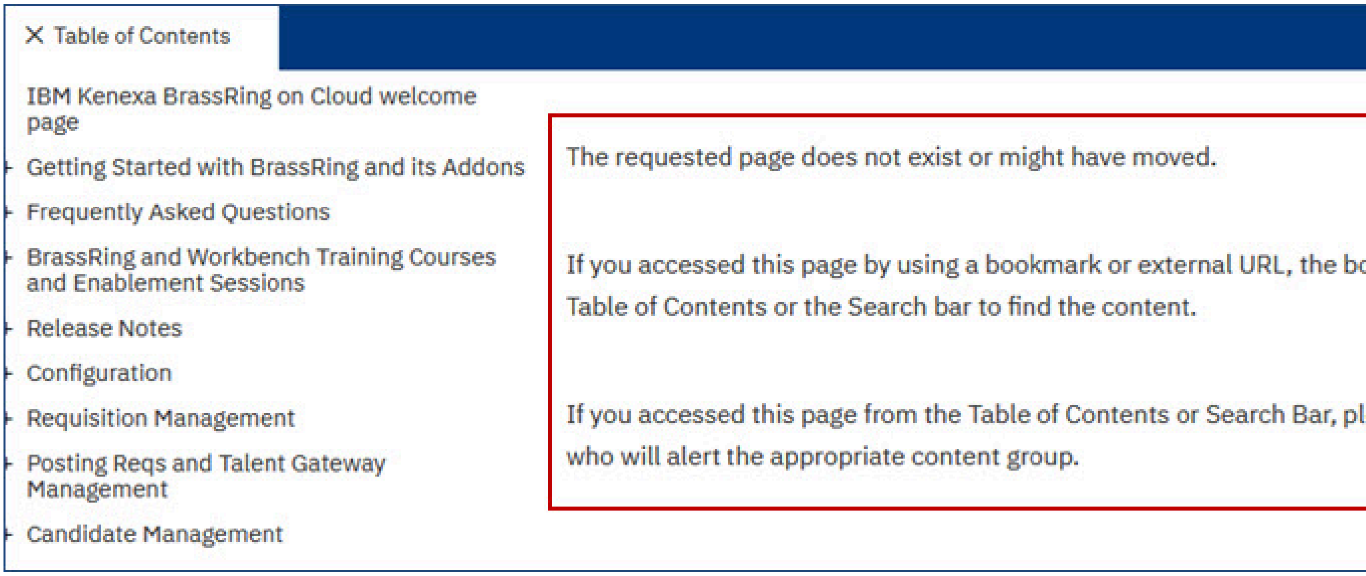
Refer to the BrassRing Welcome page on the IBM Knowledge Center for a **Pre-Release** version of the BrassRing Release Notes.

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.

Watson Campaign Automation Navigation Update

Note: On July 17th an update was made to the Watson Campaign Automation Navigation menu. For more information on the navigation update, see the IBM Knowledge Center here. The Lead Manager and Watson Campaign Automation training documentation has been updated to reflect this change.

Ending Support for Classic Talent Gateways

Everything You Should Know About Ending Support for Classic Talent Gateways

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 & 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 will be dropped at future point To Be Declared):

- 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 previous 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).

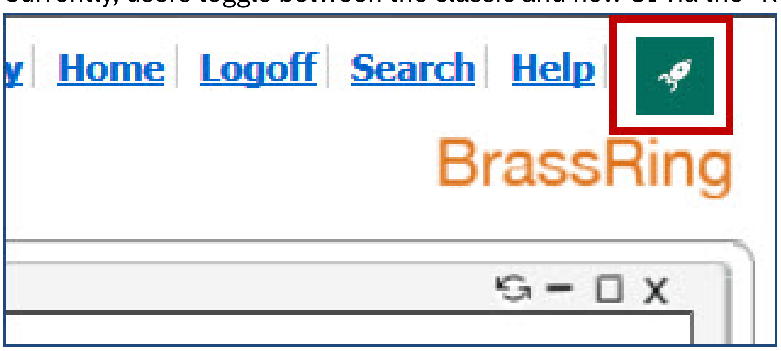
Want to get started on the IBM Responsive Candidate Experiences but don't know where to start? Watch our Responsive Apply Overview and Configuration Webinars to understand who should be involved, an example project timeline, configuration instructions, and much more! IBM has also hosted multiple sessions 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.

BrassRing Classic UI - Retirement

The **Classic User Interface (UI)** of IBM Kenexa® BrassRing® on Cloud will be sunset throughout 2019, and **no longer be accessible after the February 2020 BrassRing Build**. This is in light of the New BrassRing Recruiter UI that has been available since February of 2015.

Note: This is in reference to the Recruiter UI, **not to be confused with Classic Talent Gateways (candidate experience)** which were sunset on December 31st, 2017.

Currently, users toggle between the classic and new UI via the "Rocket Ship" icon



in standalone BrassRing or via the "Enhanced Experience" option in Talent Suite. While the default settings for user types update to the new UI in **May (staging)** and **August (production)**, the toggle remains in tact, allowing users to switch back and forth, until **February of 2020** when the classic UI is retired. At that time, the toggle is removed and the classic UI will not be accessible in any environment of BrassRing.

Note: Starting the previous release, that is, 26th August 2019, when the default setting for user types update to the new UI, the support for classic UI ends. No support tickets are admissible for the classic UI related issues from then.

Note: With the BrassRing Responsive User Interface becoming the default UI in this release, we would like to remind customers that all BrassRing Training and Documentation is in the Responsive UI. There is no longer any Classic UI training or documentation. The *BrassRing: New User Fundamentals* badge course is also in the Responsive UI, so your users can take that course (for free) to learn how to user the Responsive UI. Details about the badge can be found on the IBM Knowledge Center here: https://www.ibm.com/support/knowledgecenter/SSEUFV/14_Training/4_BrassRingAndWBTraining.html

IBM strongly urges and recommends that your organization transitions to use of the new UI as soon as possible if you haven't already! The new UI:·

- Provides a smoother recruiter experience while being away from the office/work space.
- Offers a clean and fast approach to BrassRing functions.
- Has the ability to brand the pages and set defaults per persona.
- **MOST IMPORTANT!** All new features and functionality improvements, such as the Advanced Search feature and the Metrics Dashboard, are **only available in the new UI**.

Not sure where to start? Our Training and Enablement Team offers a wealth of resources regarding the new UI on the BrassRing Knowledge Center (KC).

Please feel free to cascade these useful tools to your team! Training and Enablement Session: BrassRing New UI (Scroll down to 2018 sessions to find this recording from July 17th)

e-Learning:

- Navigating BrassRing
- Creating Requisitions
- Post to Talent Gateways
- Searching BrassRing
- Updating HR Statuses
- Reviewing Talent Record
- Working with Candidate Forms
- Sending Communications

Thank you for your support and partnership as we look to the future of BrassRing and your Recruiter Experience!

Discussion: We Want Your Feedback About Upcoming Features
The IBM BrassRing team has adopted a Dark Launch release process for high-impact features. This entails having select features rolled out to the **Staging-environment-only** for an undetermined amount of time. This process allows you to test and provide feedback on those select features. The Production release date is then determined based on feedback collected, testing, additional development required, etc.

How do you provide feedback about the features released to Staging only?

A new discussion link is included in the feature description of the Release Notes document. (Only select features will have this discussion link included.) The link directs you to the Sales Force Support Community and it requires you to have an IBM ID to post your feedback.

Note: Please note, this discussion link is to be used to provide feedback on the new feature. For questions about functionality not answered via the release notes, please reach out to the Product Consulting team for additional details.

Benefits Include:

- Releasing specific features to Staging only allows you to test the feature and complete any change management activities required within your recruitment team.
- A quick and easy way to submit your valuable feedback about an upcoming feature.
- Monitored by the IBM Offering Management team, meaning your feedback is getting directly to the team responsible for the future direction of the BrassRing product.
- Ability to view feedback provided by other clients

We look forward to your participation and feedback!

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**.

- **Starting this release, BrassRing Workbench is compatible with the Google Chrome web browser.**
- Configure a delay in the HR status update on Talent Gateway Application details screen.
- Enhanced two factor authentication for resetting a forgotten password to BrassRing Talent Gateways.
- A new Panel Standard field **Days Open** is available to add to My Open Reqs and All Open Reqs panels.

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.

Work Opportunity Tax Credits (WOTC) - Enhancements

Note: This feature is deployed to Staging environment - Only with this release. This feature **will NOT be released to Production on January 20th, 2020**. A Production date is yet to be determined. Visit the upcoming release notes for status updates on this feature.

The stand-alone WOTC Form has the following enhancements:

- Starting this release, the stand-alone WOTC is enhanced to provide responsive user experience.
- The back button and progress bar are removed.
- The header and footer of Responsive Gateway Questionnaire are emulated in the stand-alone WOTC screen.

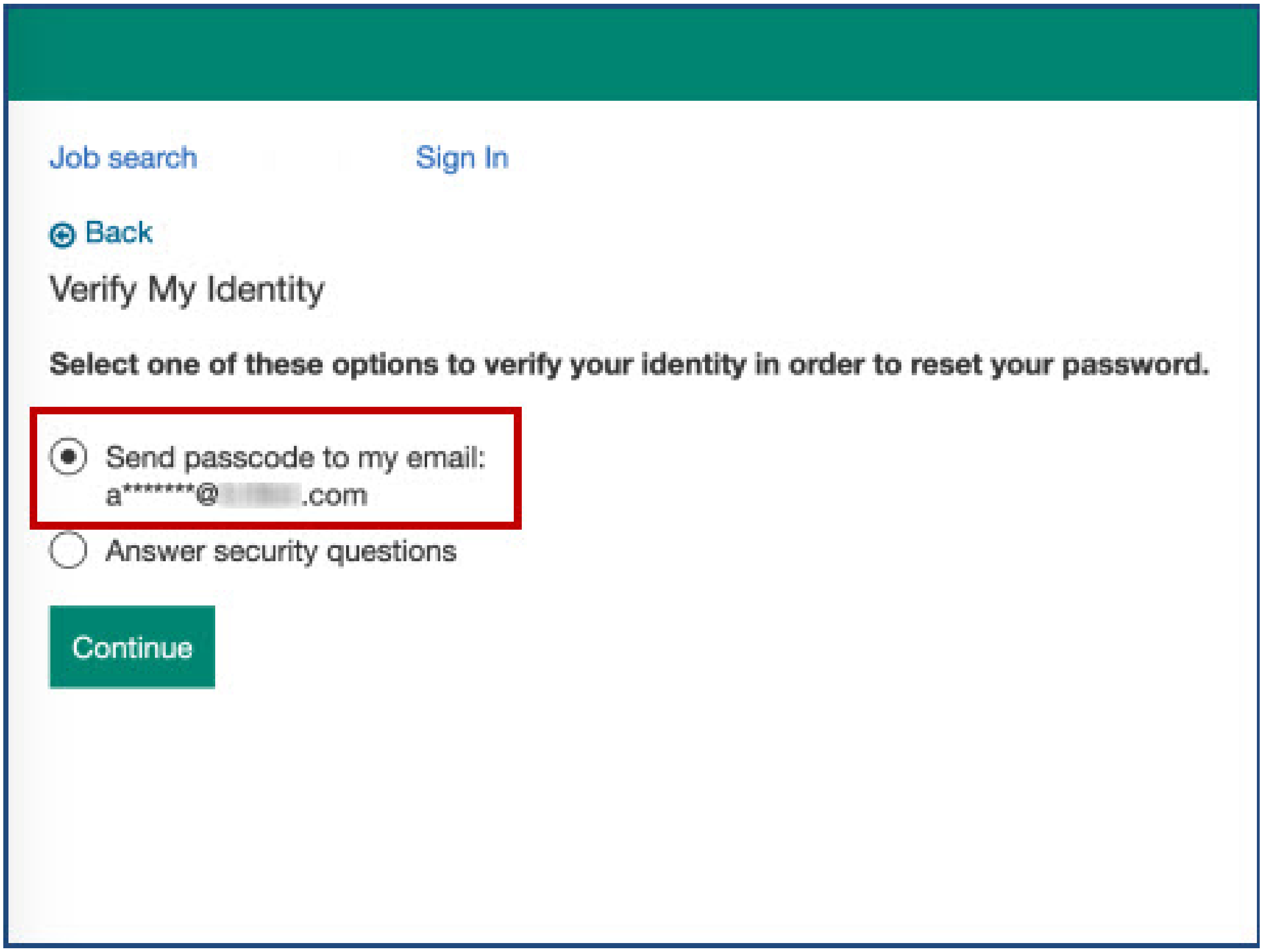
RTC internal reference # 121374.

Visible Changes

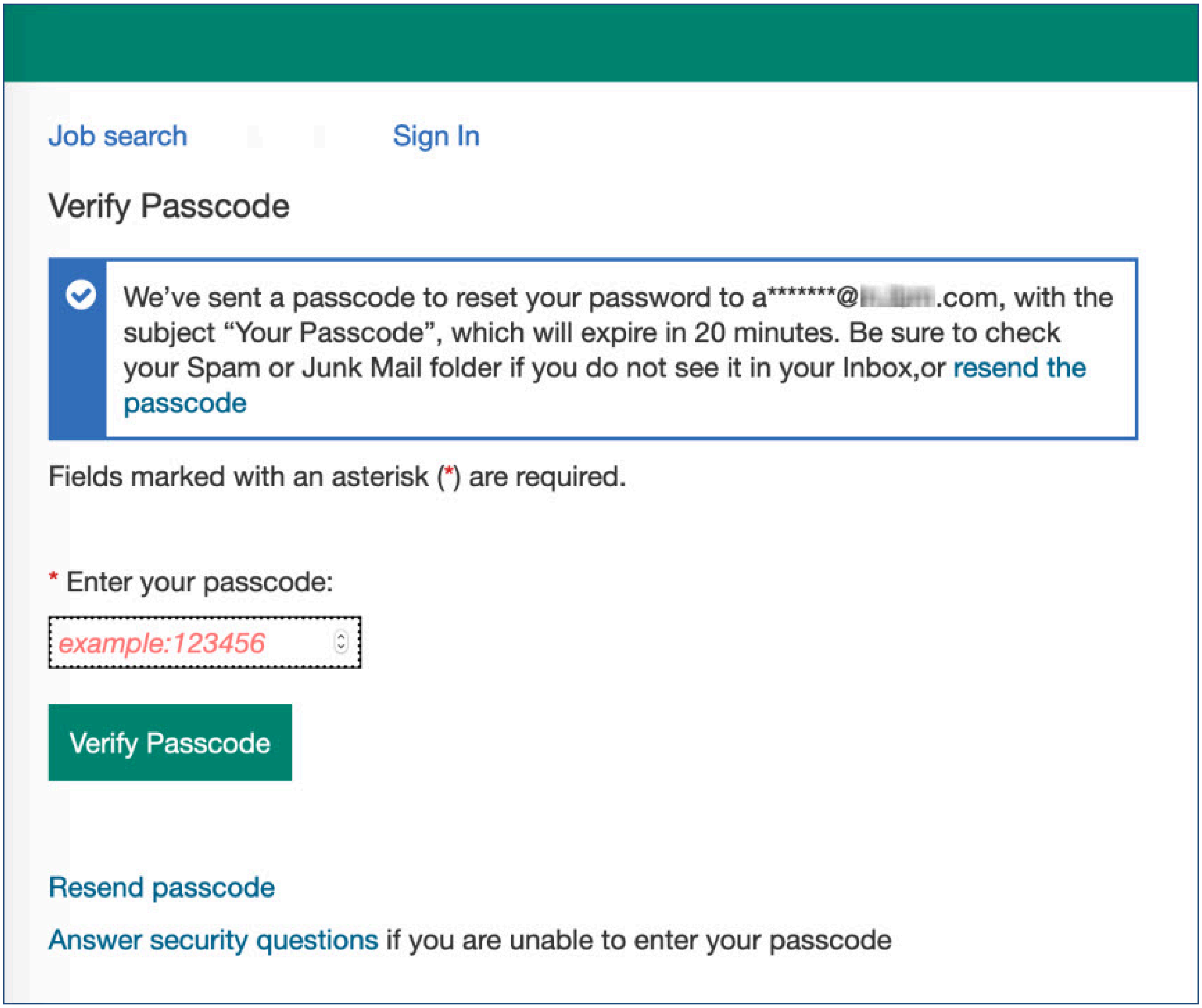
The current release of IBM Kenexa BrassRing on Cloud includes the following visible changes for BrassRing and IBM Kenexa Lead Manager.

Talent Gateways - Forgot Password - Two Factor Authentication

Previously, when candidates forgot their Talent Gateway profile password, they had to answer security questions before they could reset the password. Starting this release, an alternative way is available for candidates as a choice to reset a forgotten password. If the candidate has an email address on their profile, they can choose to have a passcode to be sent to their email address.

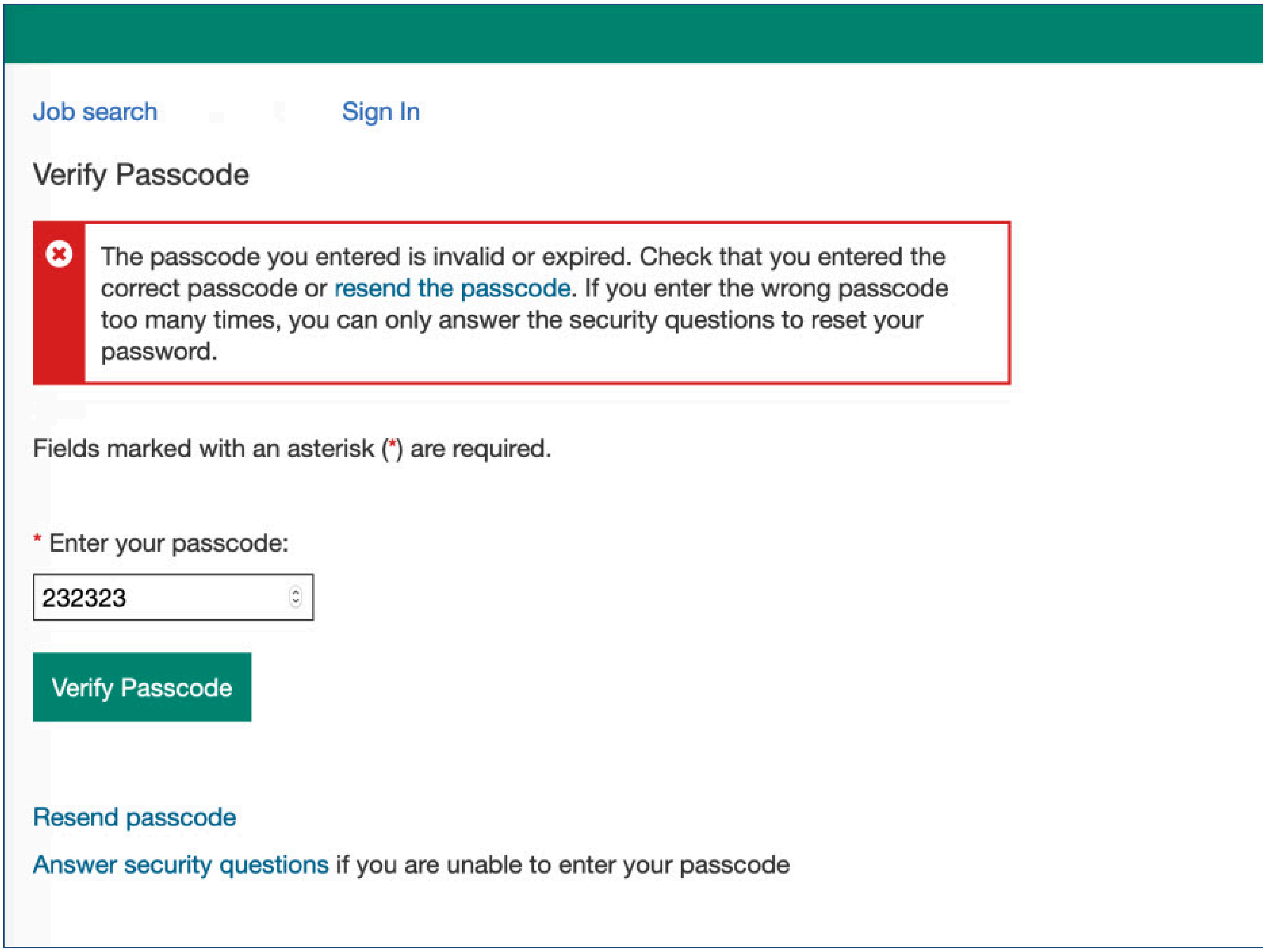


Candidates then enter the correct passcode in the designated field on the Forgot password page of the Talent Gateway and then reset their password. A six-digit passcode is sent to the candidate's communication email address. If the candidate does not have a communication email address on their profile, the passcode is sent to their login email address.

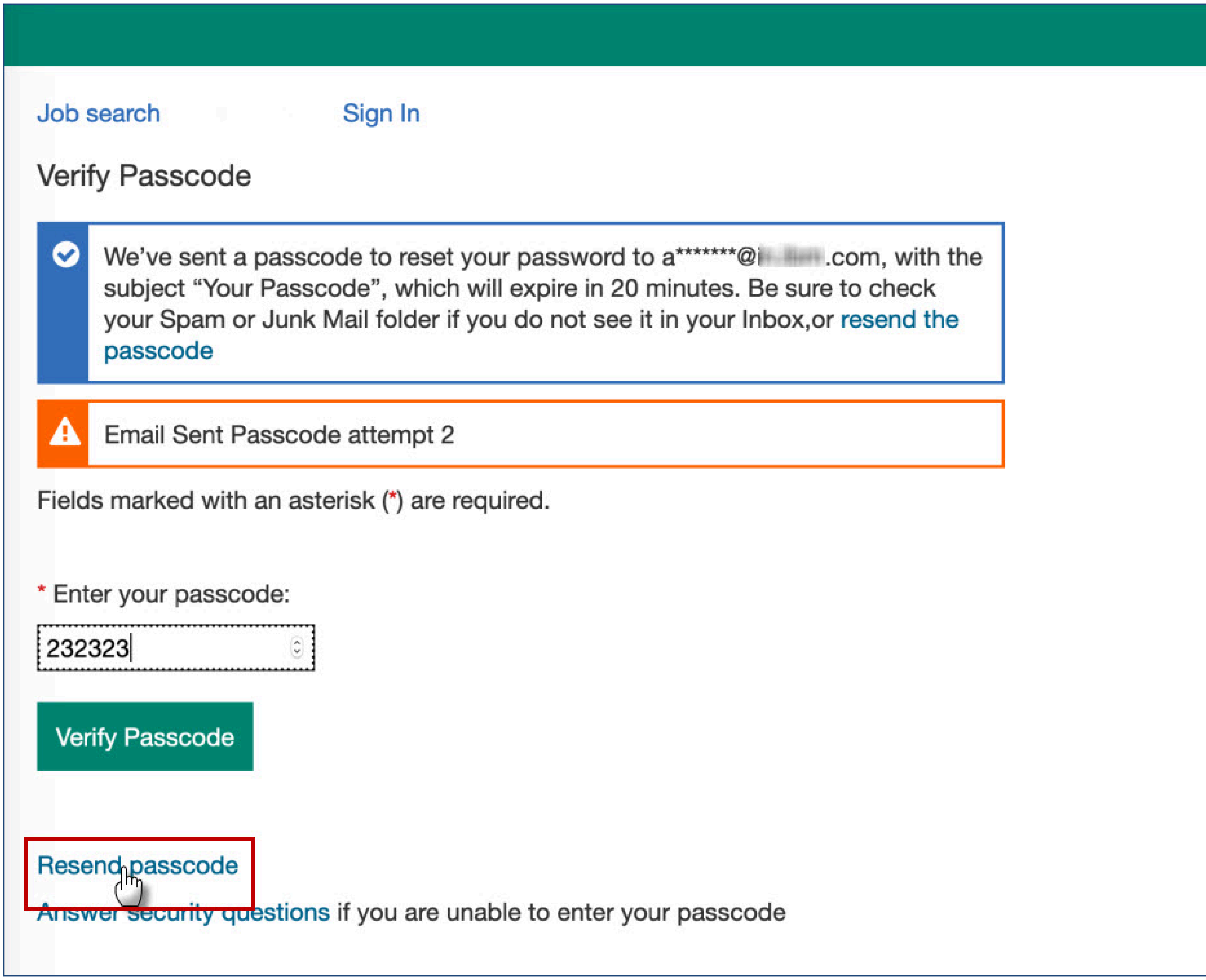


The email address to which the passcode is sent is displayed to the candidate in a secure format. If the candidate does not have any email address on their profile, by default, the only choice available for the candidate is to answer security questions to reset their password.

When the candidates choose to reset their password by using the passcode option, they receive an email with a six-digit passcode. The Talent Gateway page must not be closed during this time. If the candidate inputs the correct passcode, they proceed to the next step of resetting their password. If an inaccurate passcode is provided, an error message is displayed.



If a candidate does not receive a passcode, a **Resend Passcode** link is available on the same page by using which candidates can resend a passcode to their email up to five times in 60 minutes.



Note:

- Entering an incorrect passcode in five consecutive attempts within 60 minutes invalidates the latest passcode. The candidate is then redirected to the security questions page to complete the password reset process.
- The passcode expires after 20 minutes of receipt of the email.

RTC internal reference # 125327.

BrassRing - Words with Accents and Accessibility

Various modules in BrassRing have the word Resume without the required French language accents - Résumé. To meet accessibility standards and allow screen readers to read **Resume/CV** with the correct sense, Resume/CV is replaced with **Résumé/CV**. This change is going to be made across all the modules of BrassRing.

The English locale version of the Lead Manager Web user interface is also a part of this update. On all the screens of Lead Manager, where the word Resume or resume occurs, this word is replaced with the word with correct accents.

Note: This change was already made in most of the screens of the Talent Gateways during release 19.02.11. Refer the IBM Knowledge Center page here for information from that release.

RTC internal reference # 124774, 125782, 125784, 125867, 126023.

Candidate Import - Blank or Inconsistent Resumes in Talent Record

It was observed that when candidates are imported via the candidate import integration, the resume in Talent Record is found to be blank or not up to date. This is because, the column in the database table that stores the resume information does not contain any information when the candidate is imported. In such cases, if that column is marked as null, the information is fetched by the system from a different column. Starting this release, the resume column is marked as null so that when a user accesses a Talent Record, it gets the resume information from a different column and does not return blank.

RTC internal reference # 125923.

Candidates - Add Contact

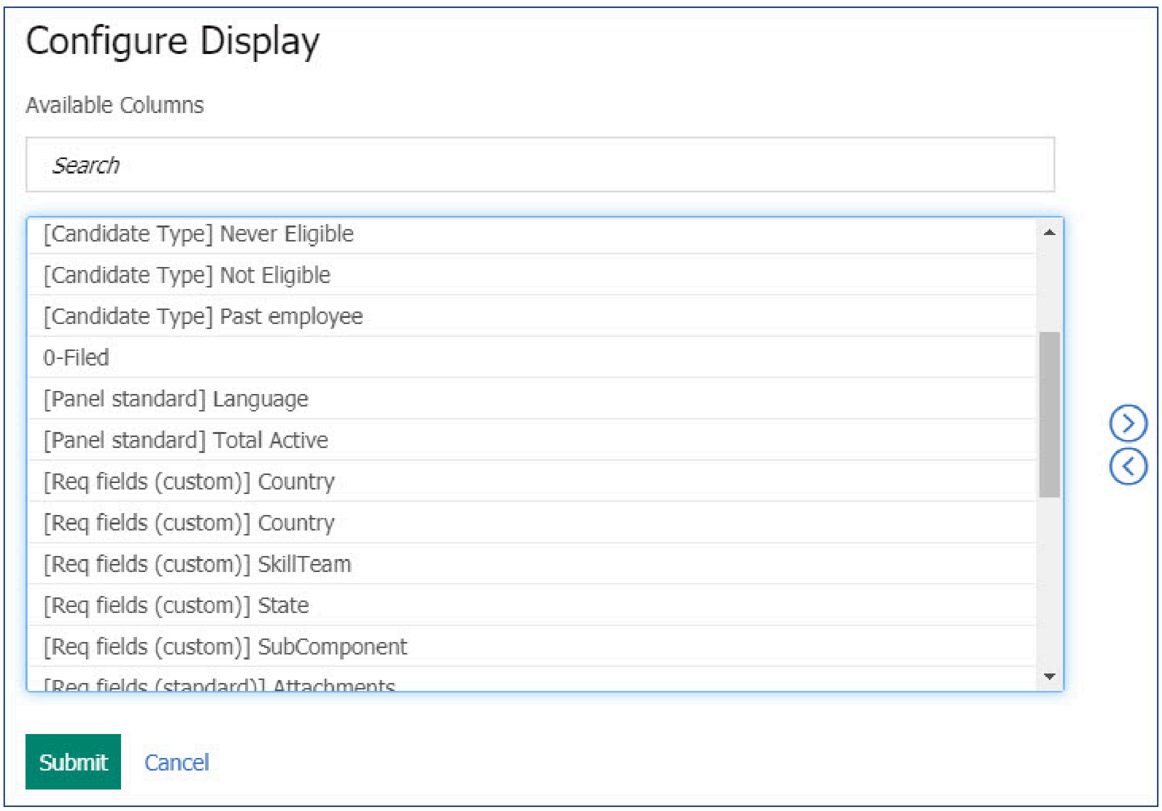
Starting the release 19.11.11, the Add Contact functionality is not available in BrassRing. This is in keeping with the process of retiring the Classic Talent Gateways. This functionality is removed from every existing workflow for all the user types.

RTC internal reference # 118705.

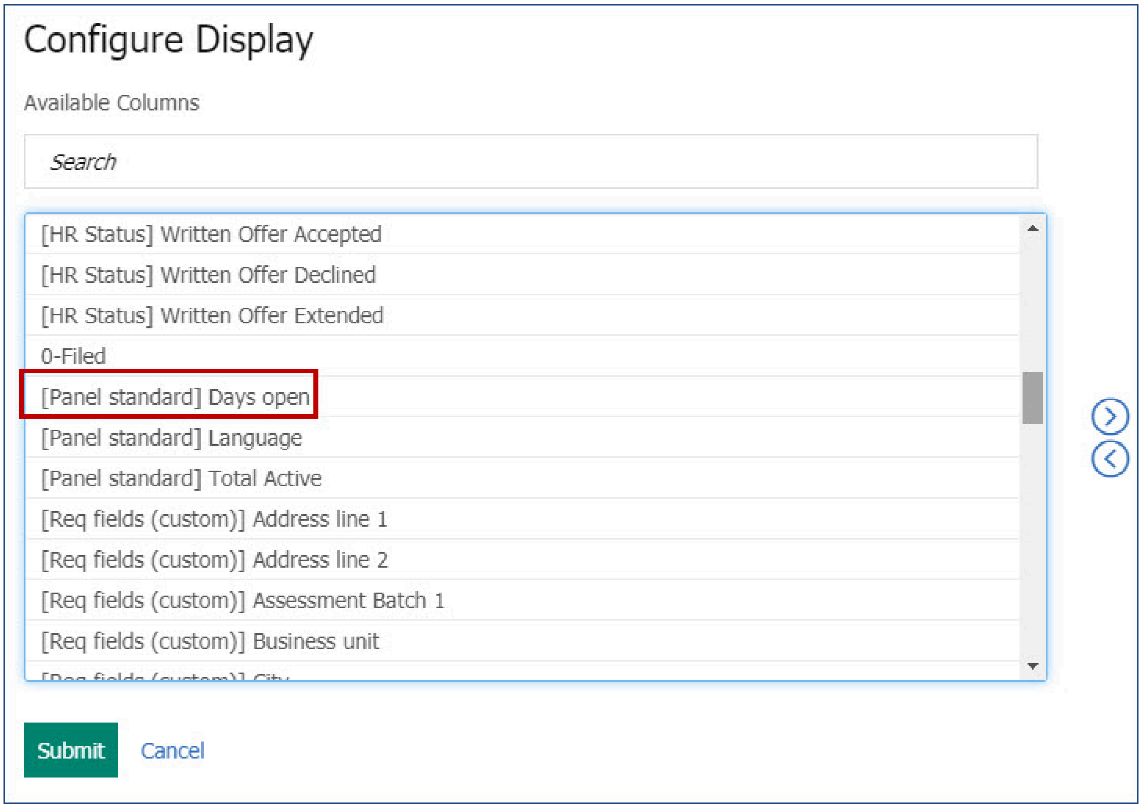
BrassRing Homepage - New Panel Standard Field

A new panel standard field **Days Open** is available to be added to the My Open Reqs and All Open Reqs panels. This column when added to the grid, the number of days for which the requisition was open.

Before this release:



After this release:

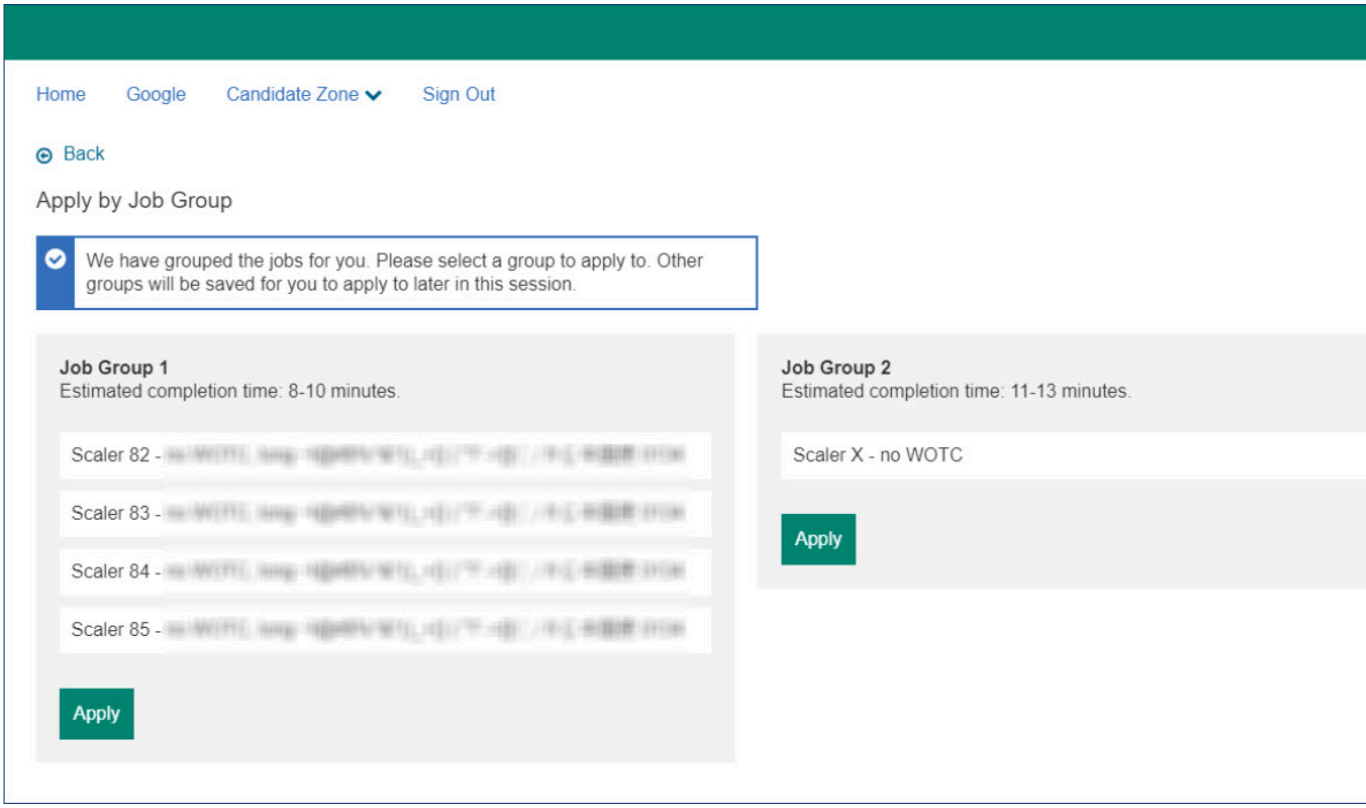


RTC internal reference #126468.

Talent Gateways - Accessibility Enhancements

Starting the release 19.11.11, the following enhancements and changes were made in the BrassRing Talent Gateways to ensure accessibility guidelines compliance -

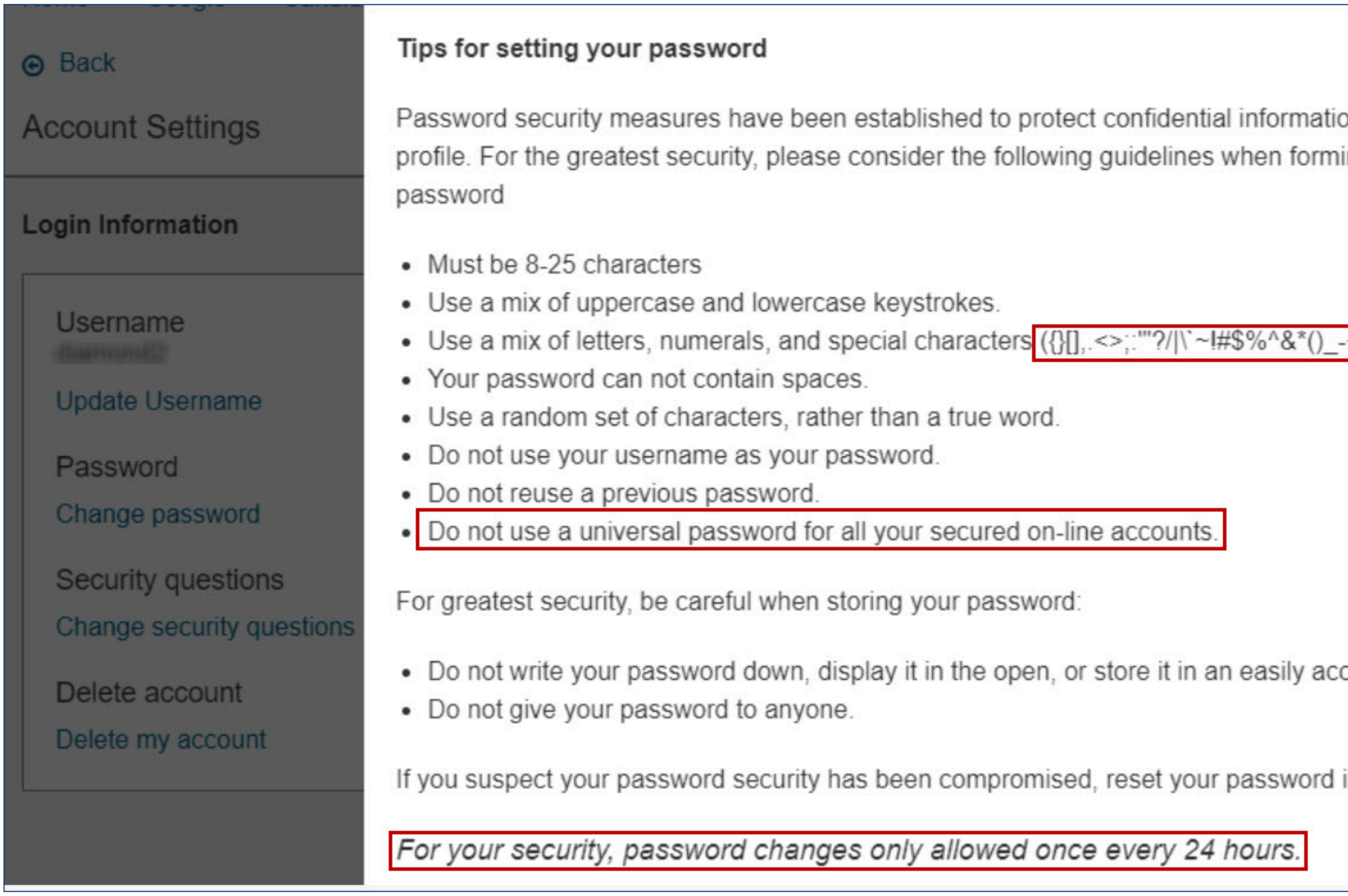
Apply to Job Groups - When a visually challenged candidate applies to a group of jobs, the header text previously did not alert about the grouping of jobs together. This is now changed. A new message is added informing the candidate that the jobs are grouped and this is read out when the candidate accesses this page using a screen reader.



RTC internal reference # 96919.

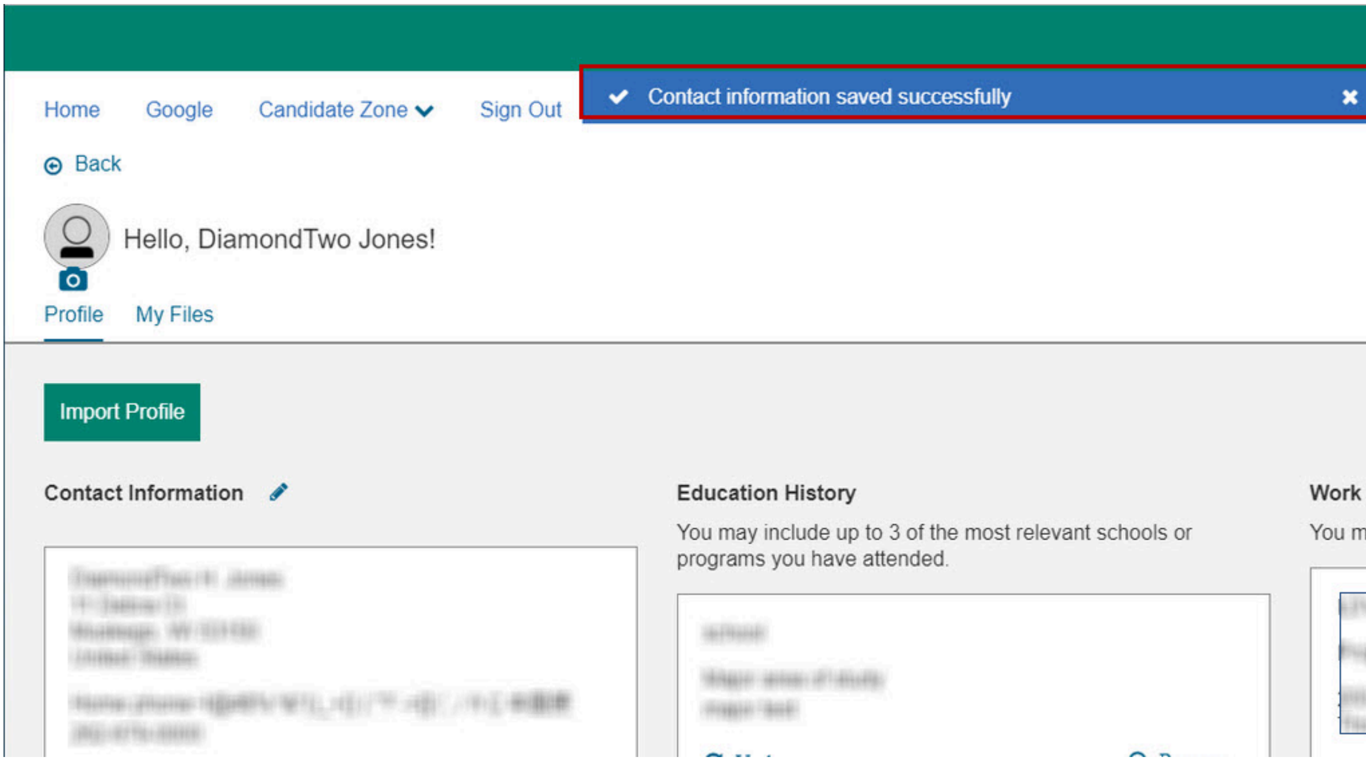
Updates to the Tips for Password Modal- The modal that lists suggestions for setting up a secure password had unnecessary characters or additional HTML code that was hindering the experience of a candidate that used a screen reader for navigating a Talent Gateway. To improve the candidate experience of the candidates that use screen readers, the following changes were made in the text.

- The list of special characters contained HTML code which resulted in the screen readers confusing the candidates. This is now replaced with all text.
- The word Universal had quotation marks which were not necessary. They were removed.
- The last sentence had asterisks to emphasize it's content. This sentence is now italicized to emphasize the content to everyone.



RTC internal reference #123793.

New confirmation message while saving contact information - When a candidate using a screen reader navigates to **Save**, the screen reader prompts they this button is for saving the contact information that the user entered. However, previously, this button was announcing the same information even after the save action was taking. This led to confusion about whether the information was saved or not. Starting this release, a new confirmation message was added to indicate that the information is saved for to candidates that use screen readers and candidates that do not.



RTC internal reference # 124224.

Data Insight Tool (DIT) - Data Based on User

Previously, when BrassRing users created DIT template, configured it to be public, and a different user ran a report by using that template, the data that is presented in the report was based on the access privileges of the user that created it and not based on the user that ran the report. Starting this release, the data that is presented in a report depends on the user type privileges and permissions of the user that schedules or runs the report and not on the user that creates the report.

RTC internal reference # 126230.

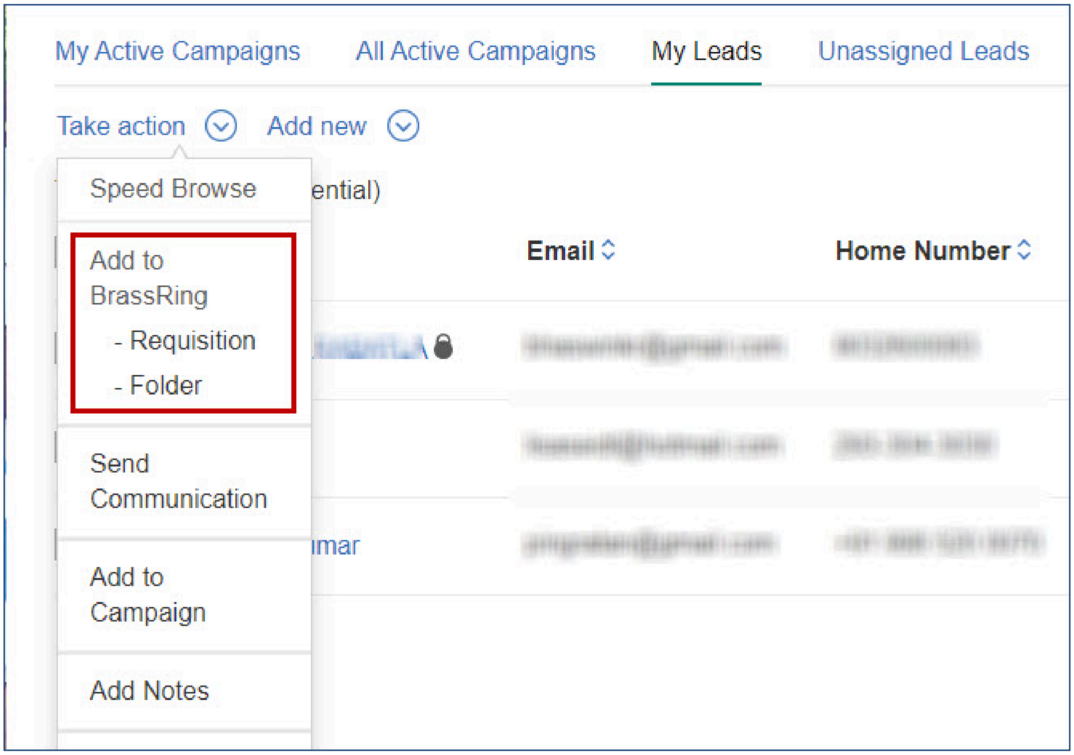
Integrations - Candidate Communication Spacing

When candidates apply on a Talent Gateway via the Skip Sign-on flow, an email is sent to the candidates with a candidate reference number along with static text. However, there was a spacing issue that was identified in the email. There is no space between the auto req ID and the static text that creates ambiguity. This spacing issue is addressed during the current release. Starting this release, the sentence of the static text is moved to the next line. This differentiates the req number, and the following sentence.

RTC internal reference # 126507.

Lead Manager - Remove Add to BrassRing as Contact

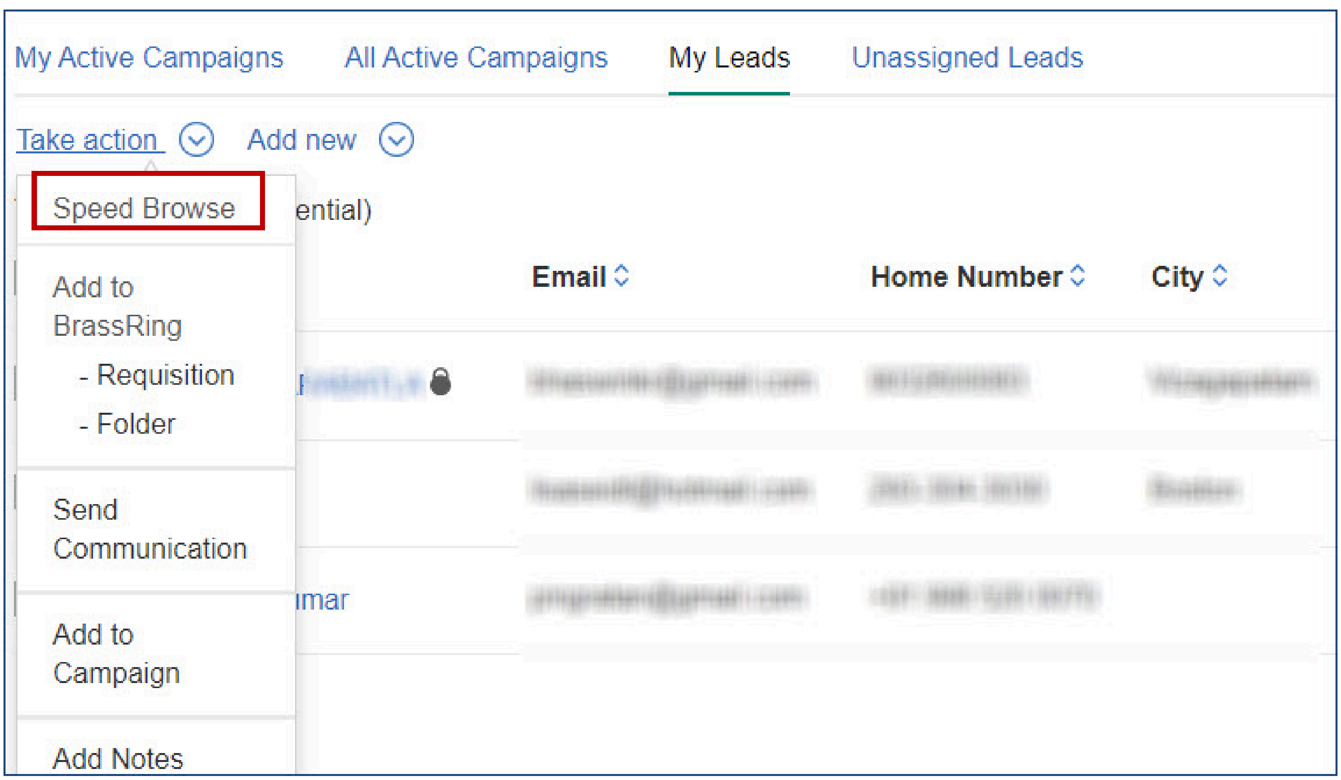
Based on changes in BrassRing functionality, the Add to BrassRing - Contact action in Lead Manager is not functional anymore. Therefore, starting this release, this functionality is being removed from the Lead manager actions.

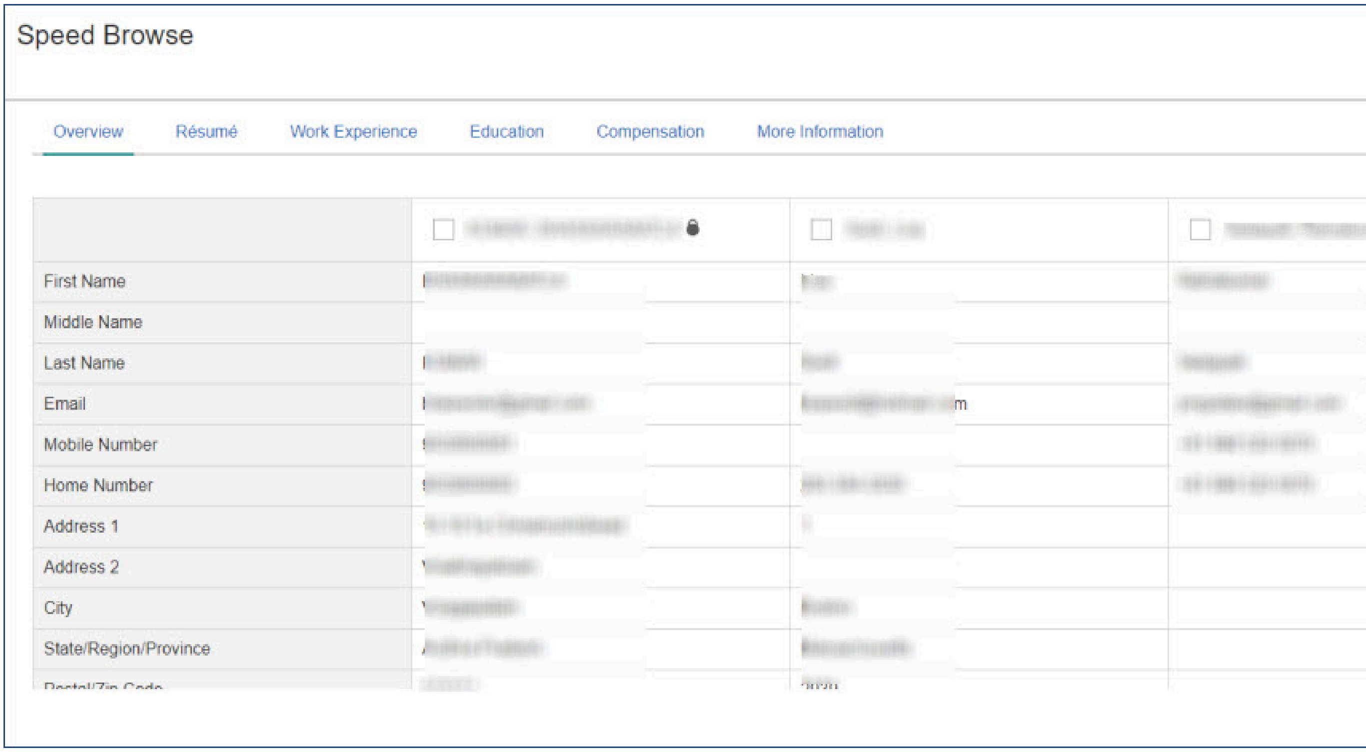


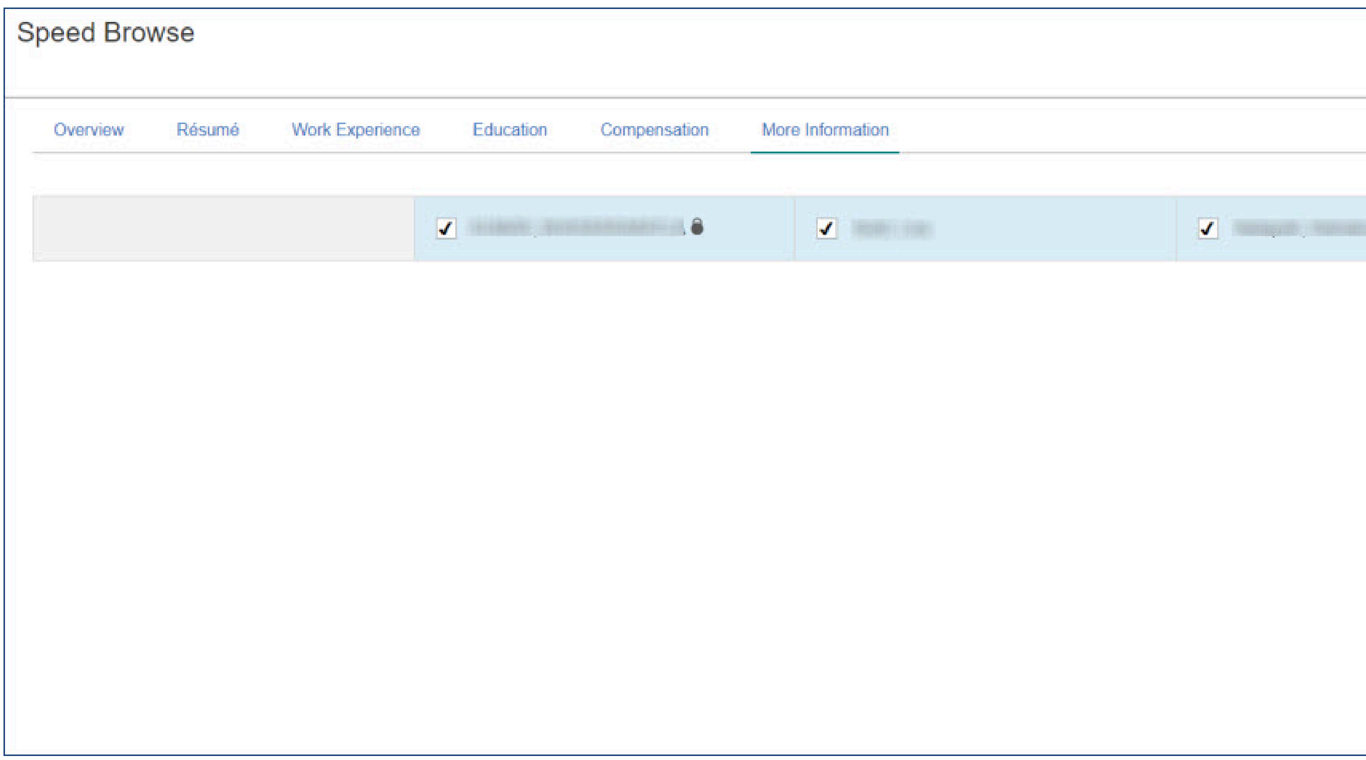
RTC internal reference # 106041.

Lead Manager - Speed Browse

Starting this release, the **Speed Browse** feature currently available in BrassRing is provided in Lead Manager. The speed browse feature enables Lead Manager users to match multiple candidates in the same screen. It also lets users select multiple candidates and take action simultaneously.



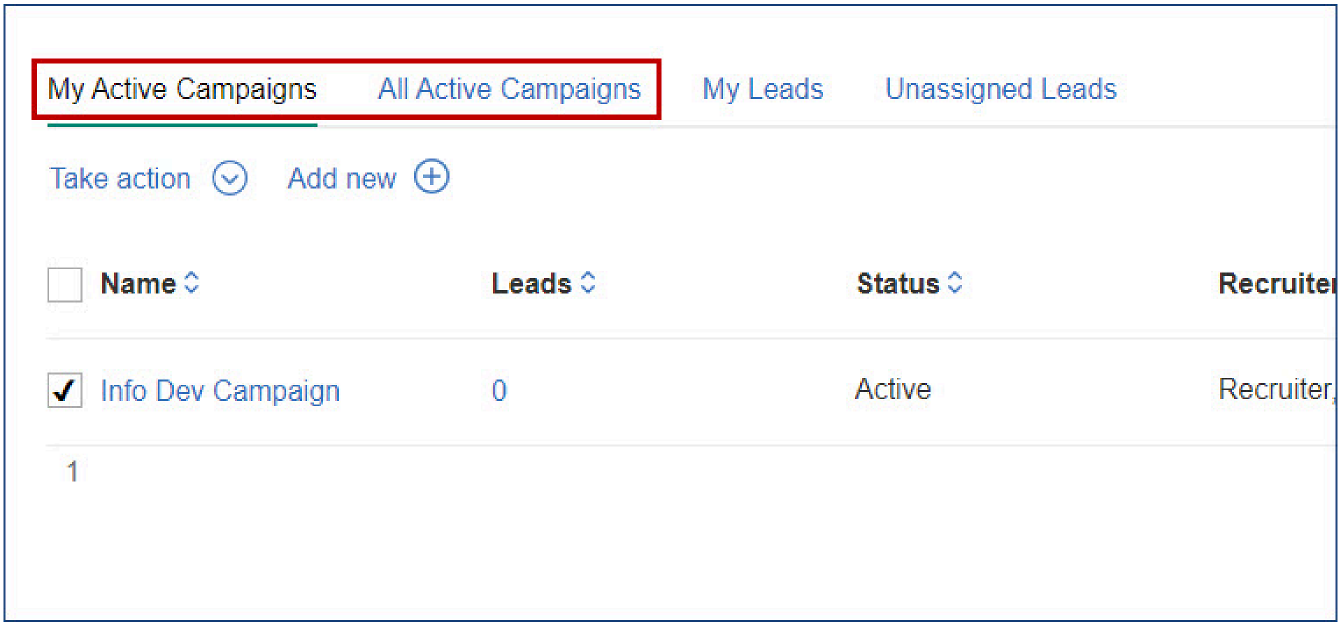




RTC internal reference # 110756.

Lead Manager - Show Active Campaigns

Lead Manager home page currently displays the list of all the campaigns that include inactive ones. To improve user experience, starting this release, the labels of the columns are updated from My Campaigns and All Campaigns to My Active Campaigns and All Active Campaigns. These columns display only those campaigns that are active.



RTC internal reference # 124798.

Lead Manager - Hide Talent Filter from External Search

As announced in the previous Release Notes, the External search feature based on the Talent Filter API is no longer available form December 28, 2019. Therefore, the Talent Filter feature is not displayed on the External Search screen. If the client does not have any other vendors associated apart from Talent Filter, the External search option is hidden for that client.

RTC internal reference # 126190.

Lead Manager - Bulk Parsing Communications

When bulk files were uploaded for parsing, and there were errors, email communication with information about the errors is sent. However, when the parsing was successful or a duplicate file was created, there was no communication about the created leads. Starting this release, the email communication includes detailed information about:

- Errors in conversion
- Successful conversion
- New Leads creation
- Converted but potential duplicates
- Failures due to corrupted files

RTC internal reference #127060.

Configurable Changes

The current release of IBM Kenexa BrassRing on Cloud does not include any configurable features for BrassRing and IBM Kenexa Lead Manager.

Talent Gateway - Delayed HR Status Display

Note: This feature was deployed to Staging environment - Only during release 19.11.11. It is going to be available in the Production environment starting this release.

Based on client request a new HR Status update delay feature is introduced in the responsive Talent Gateways. Clients can now configure a delay between when a final HR Status update in BrassRing happens and when is it going to be visible on the **Application Details** page in a candidate's Talent Gateway profile. Following are the Talent Gateway screens where this feature is available:

- **Candidate Zone** > **Dashboard** > **Applications** > **Submitted Applications** > **Candidate then selects a submitted application card.** > **Application Details**

- **Candidate Zone** > **Referrals** > **Active Referrals**

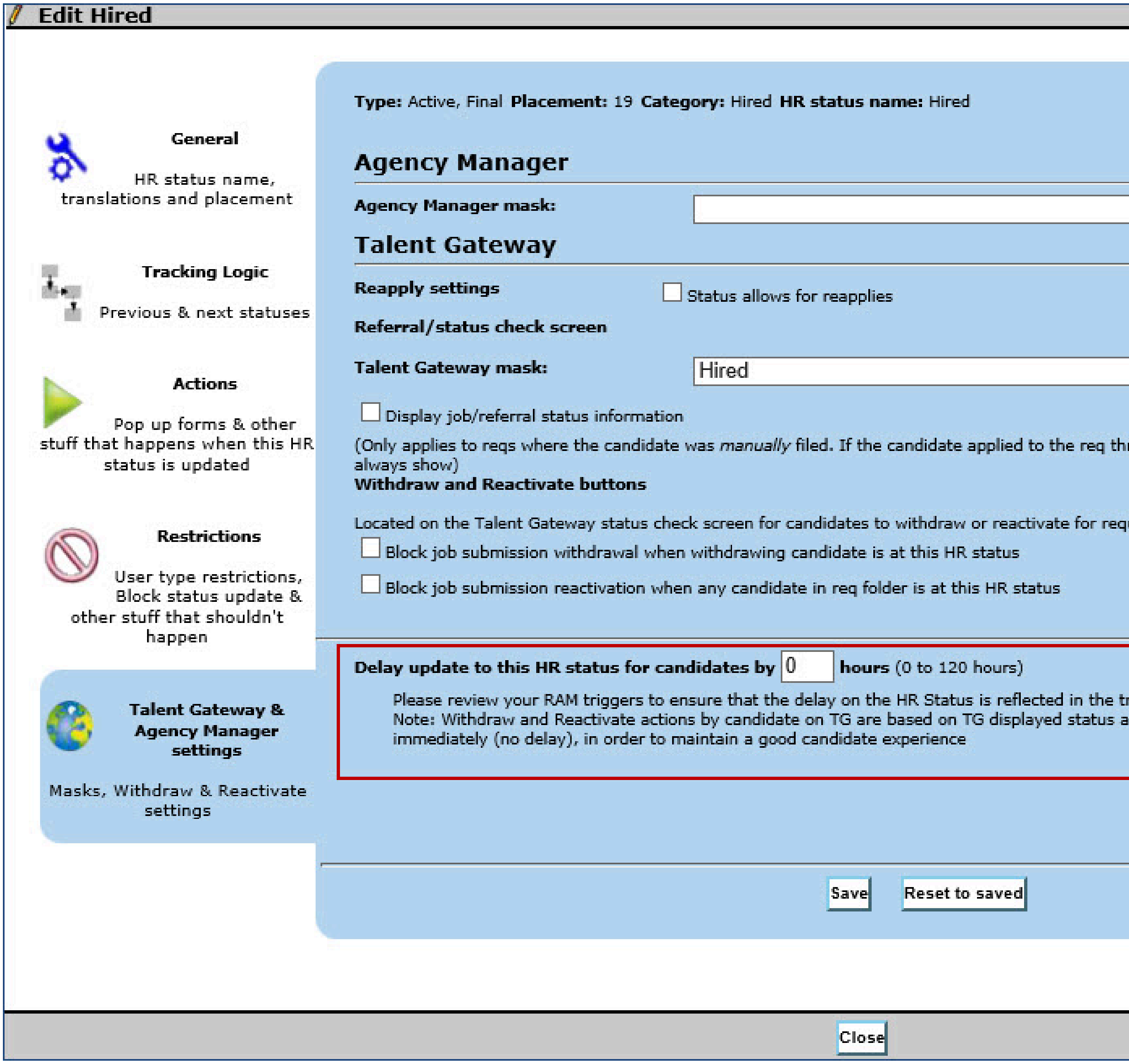
Following are the details for this feature:

- This feature is available only for Final HR status categories.
- A candidate logs in to their Talent Gateway profile, and goes to the Application Details section. If a delay is configured, the previous HR status category is displayed.
- After the delay period is elapsed, the updated HR Status Category is displayed based on current HR Status.
- Withdrawal of application is allowed based on the HR Status that is displayed. (Only if the displayed HR status allows withdrawal.)
- When a candidate withdraws application, the withdrawal status is displayed immediately. A delay cannot be configured in this case.
- Reactivation of an application is allowed based on the HR status that is displayed on the Talent Gateway.

Note: Withdraw and Reactivate features work based on HR status that is displayed on the Talent Gateway (even if different in Recruiter Experience, due to the configured delay) and update to "next" HR status is immediate (disregarding any configured delay). This change is to ensure a good candidate experience based on the HR Status Category they see at the time of such actions. The resulting HR status change (based on Withdraw or Reactivate) might potentially override the "delayed update" that was previously in place. If clients would like to avoid this situation, they can block Withdraw and Reactivate for all final statuses or else do not use this delay feature.

How do clients get this feature?

A new setting **Delay update to this HR status for candidates by ___ hours** is added. This setting is added to the Talent Gateways and Agency Manager settings in Add/Edit HR status page of all the final HR status categories. By default, this setting is blank. The number of hours can be configured in the range 0-120. If a user tries to save the configuration with any other value, an error message is displayed.

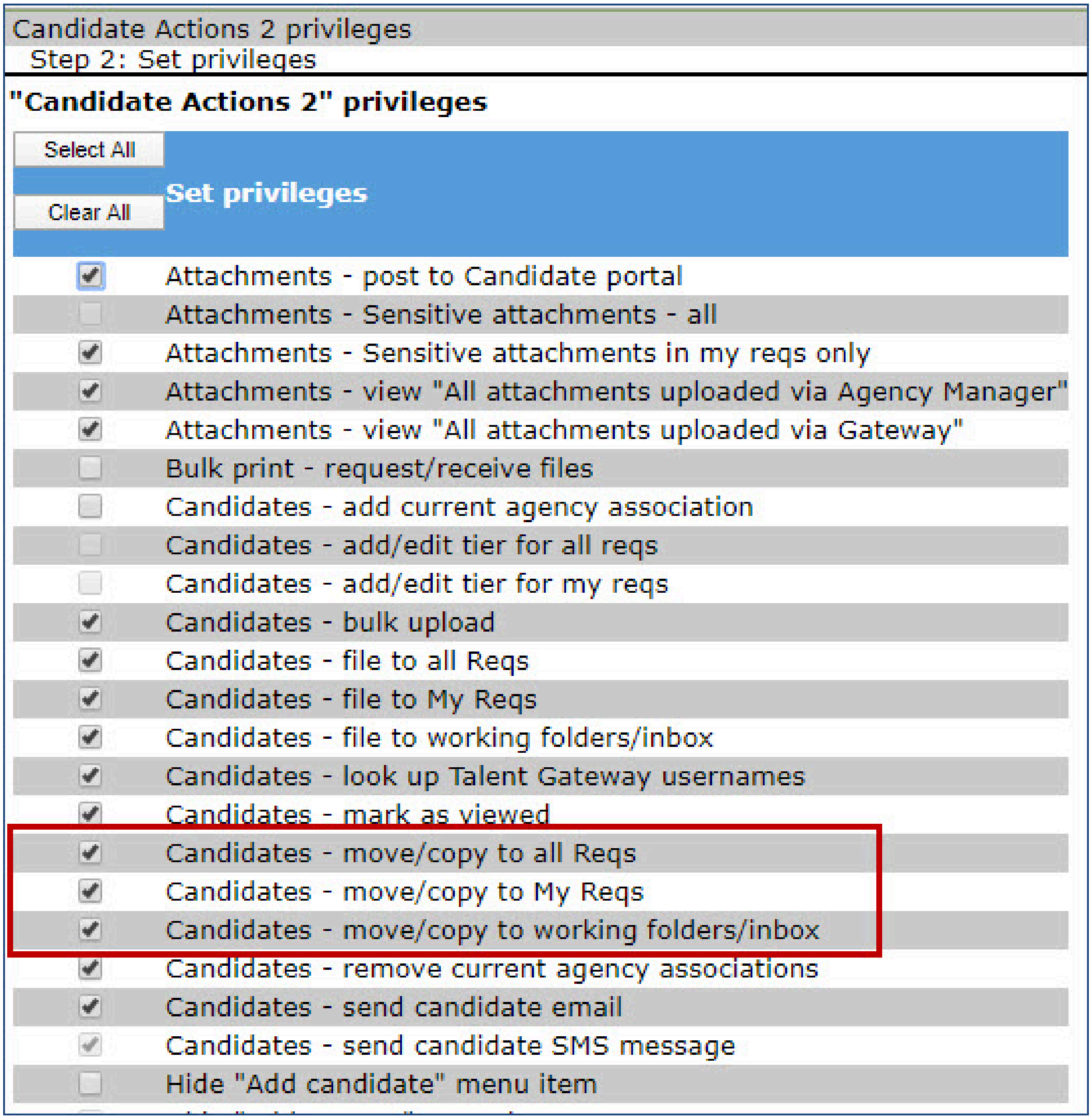


RTC internal reference # 122911, 122912.

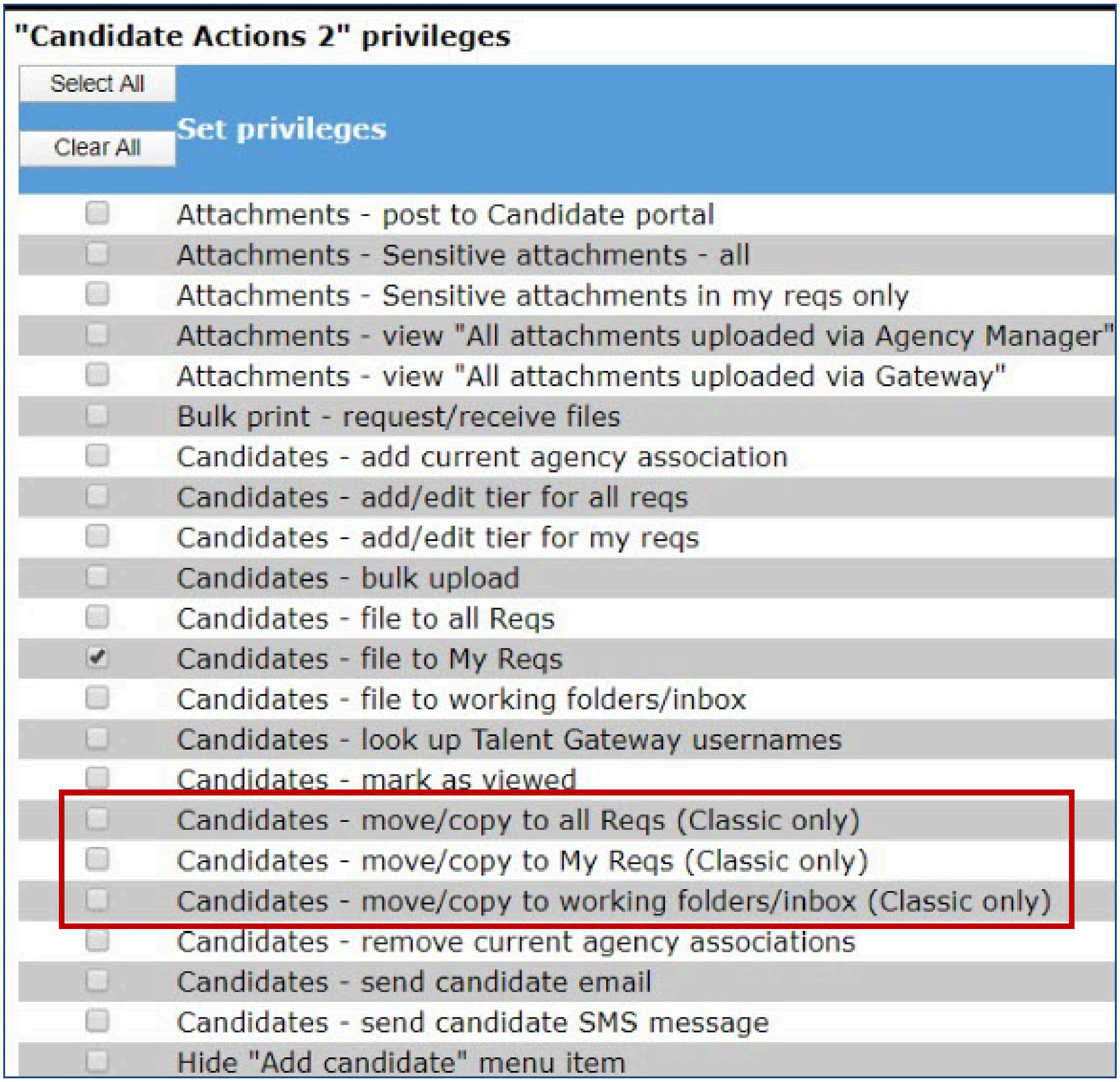
Candidates - Separate Privileges for Move and Copy to Requisitions

Copying and Moving candidates from one requisition to another in BrassRing depends on the users' user type privileges. Previously, the same set of privileges was used for both Move and Copy operations. Based on client request, starting this release, a separate set of privileges is provided for move and copy operations in Responsive BrassRing. A new set of privileges is added in the Workbench User Types - Candidate Actions 3 section. The existing set of privileges in the Candidate Actions 2 section is now available for use with Classic BrassRing only. Therefore, the existing user type privileges for move and copy are relabeled indicating that they are for use with Classic BrassRing only.

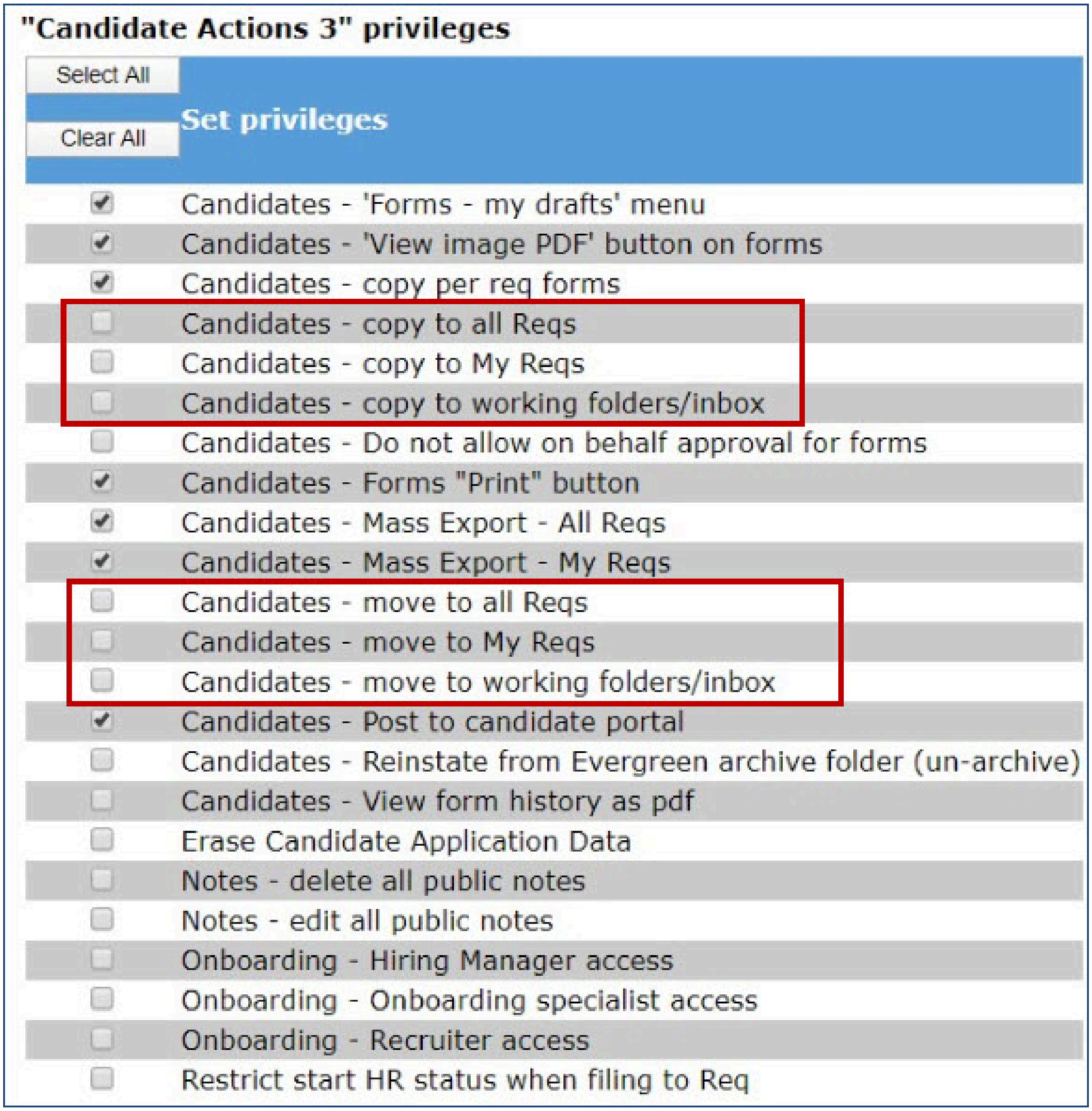
Before this release:



After this release:



New user type privileges path: **Tools** > **Users** > **User types** > **[select user type]** > **Edit type permissions** > **Candidate Actions 3**



The candidate actions menu in Responsive BrassRing remains the same. The Move/Copy to Req action is available as a single action item in the menu. However, the pop-up screen that is displayed for the move or copy to req action works differently starting this release. The move and copy buttons are enabled for users based on their user type privileges. If the user type has neither My Reqs nor All Reqs available for Move, then the corresponding button is disabled in the pop-up screen. Similarly, if neither My Reqs nor All Reqs is available for Copy operation, then the corresponding button is disabled in the pop-up screen.

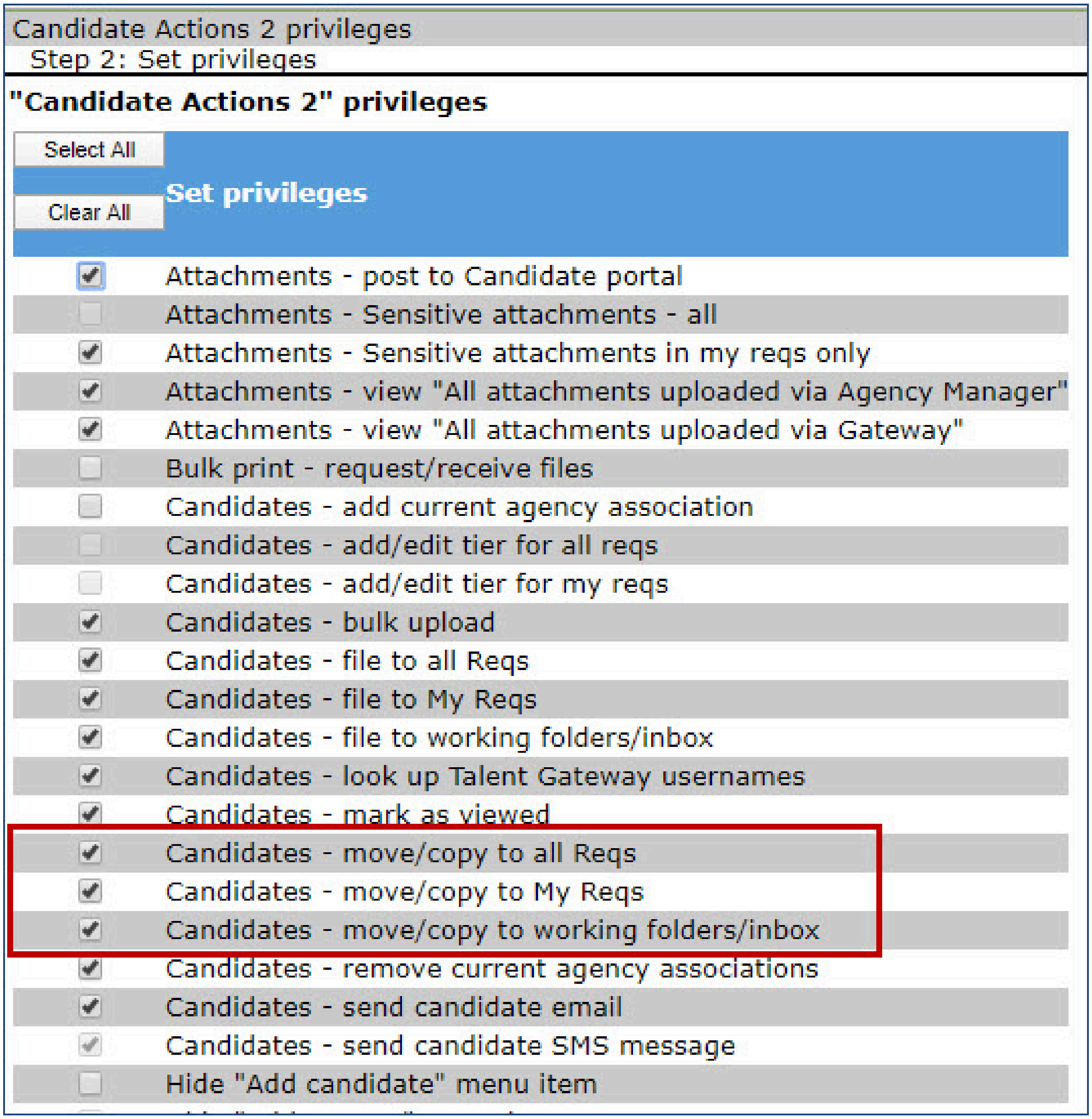
When a user type has Copy to My Reqs only enabled, and the user tries to copy a candidate to a req with which they do not have a My req relationship, an error message is displayed. The error message **Candidates could not be copied to the following reqs due to insufficient privileges <Req ID>** is displayed to the user when an action is attempted without required privileges. A similar message is displayed when users attempt to move a candidate from one requisition to another if they do not have sufficient privileges. **Candidates could not be moved to the following reqs due to insufficient privileges**

RTC internal reference # 120958, 125550.

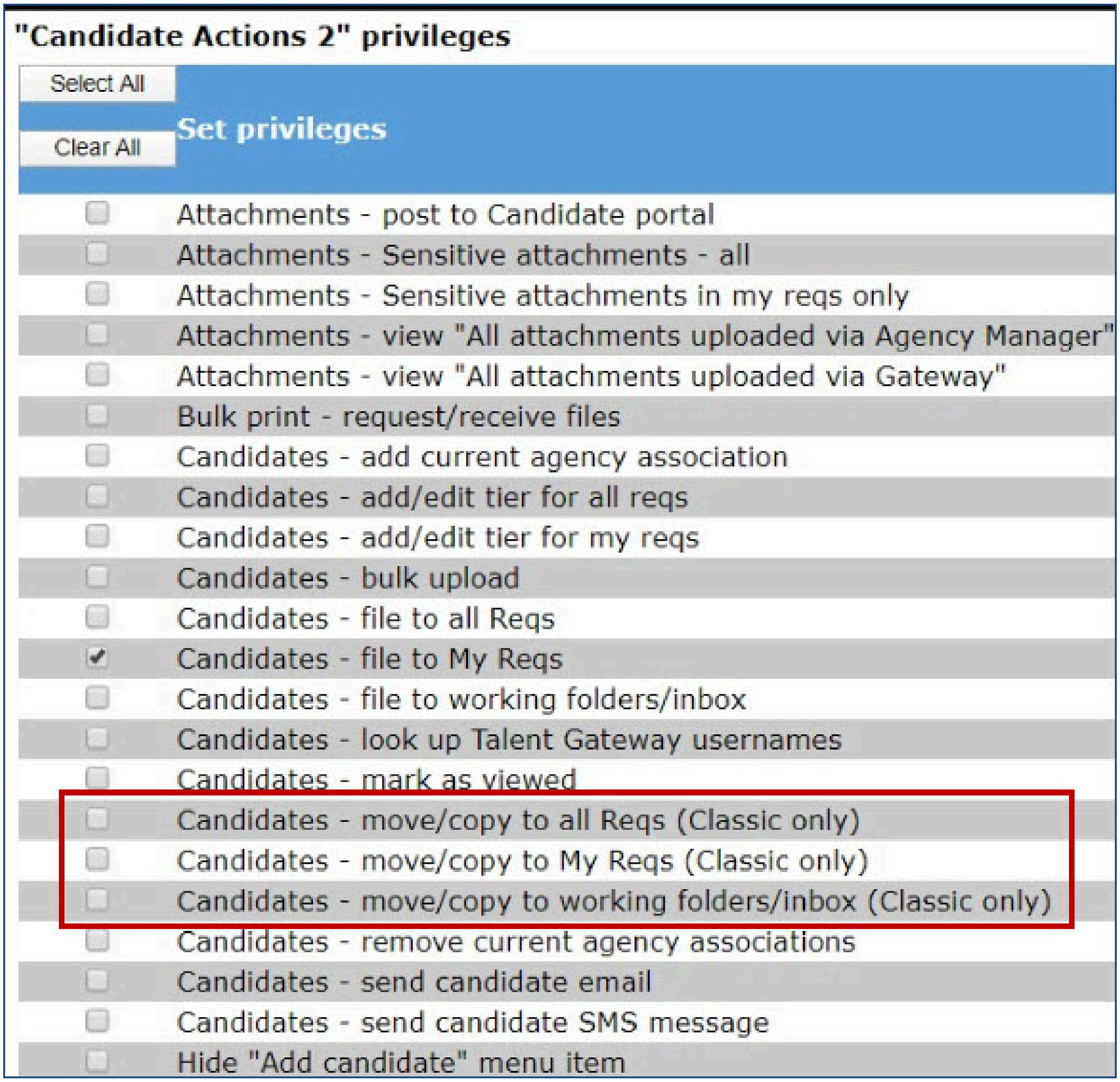
Candidates - Separate Privileges for Move and Copy to Working Folders

Copying and Moving candidates from one folder to another in BrassRing depends on the users' user type privileges. Previously, the same set of privileges was used for both Move and Copy operations in folders. Based on client request, starting this release, a separate set of privileges is provided for move and copy operations in Responsive BrassRing. A new set of privileges is added in the Workbench User Types - Candidate Actions 3 section. The existing set of privileges in the Candidate Actions 2 section is now available for use with Classic BrassRing only. Therefore, these existing user type privileges for move and copy are relabeled indicating that they are for use with Classic BrassRing only.

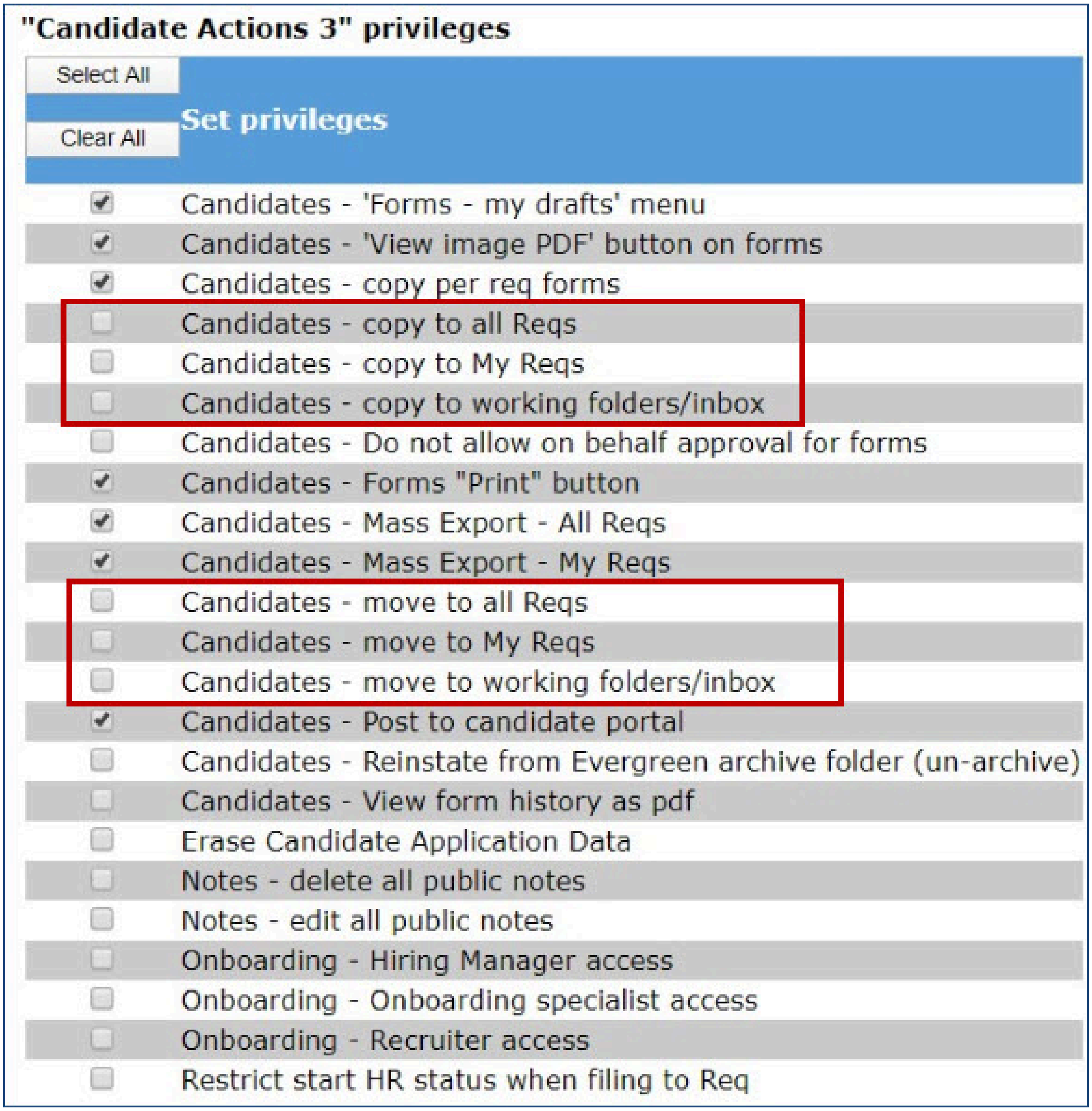
Before this release:



After this release:



New user type privileges path: **Tools** > **Users** > **User types** > **[select user type]** > **Edit type permissions** > **Candidate Actions 3**



The candidate actions menu in Responsive BrassRing remains the same. The Move/Copy to Folder action is available as a single action item in the menu. However, the pop-up screen that is displayed for the move or copy to Folder action works differently starting this release. The move and copy buttons are enabled for users based on their user type privileges. If the user type does not have "Candidates - copy to working folders/inbox" privilege, then the corresponding button is disabled in the pop-up screen. Similarly, if "Candidate - move to working folder/inbox" is not available, then the corresponding button is disabled in the pop-up screen.

RTC internal reference # 125497, 125982.

Req Form Approval - Process Improvement - Communication Template Token

As a part of the Req form approval process improvement, a new place holder token **[#ReqFormApprovalReminder_URL#]** is added in the communications template. This token is replaced by a Req form approval reminder URL as a link when a RAM Trigger is processed to send an approval reminder communication.

RTC internal reference # 125143.

BrassRing Workbench

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

Workbench - Compatibility with Google Chrome

Starting this release, based on client requests, BrassRing Workbench is compatible with the Google Chrome web browser. Workbench can now be accessed using Google Chrome from version 75.0.3770.100 or a later version of the same browser.

RTC internal reference # 122177.

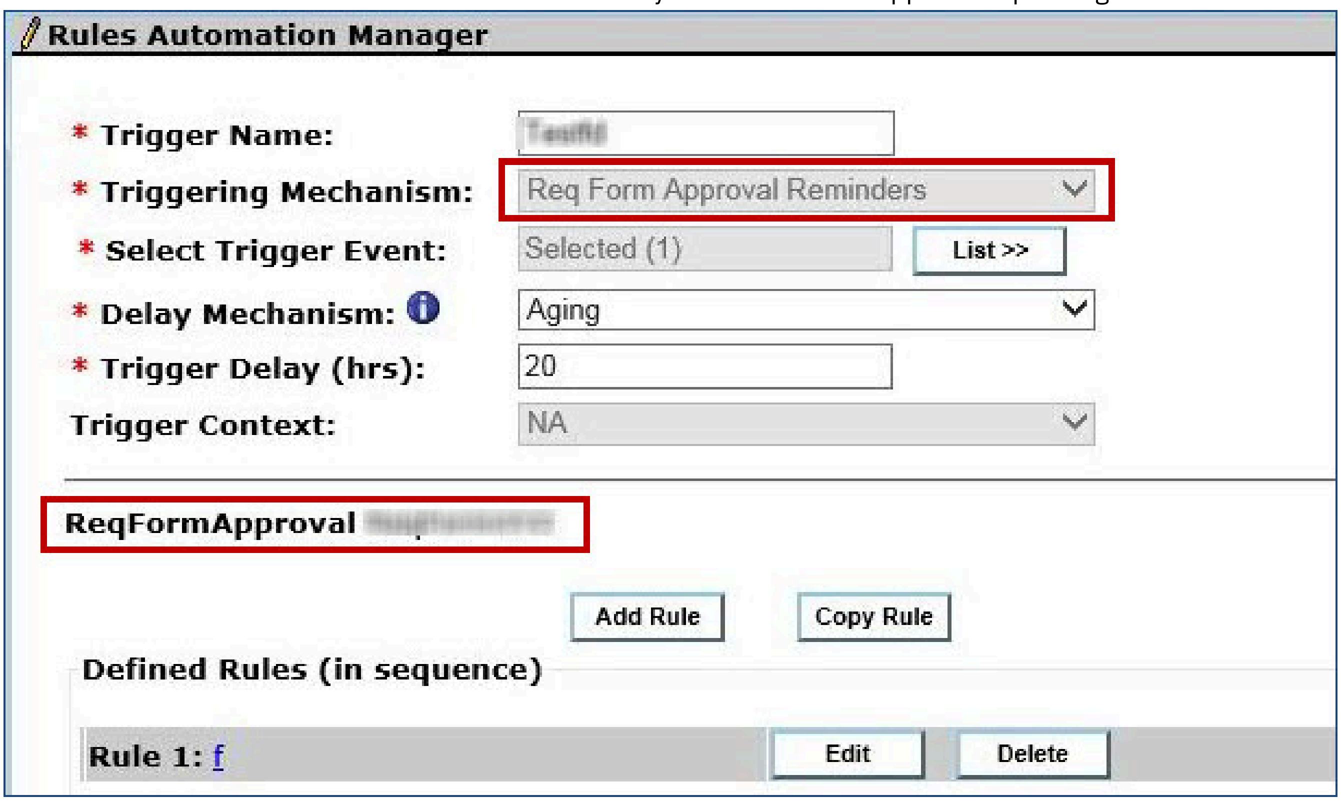
Basic Talent Gateways - Remove Ability to Save Add Contacts

Starting this release, Workbench users cannot save a new Basic Talent Gateway as an Add Contact gateway. The feature of Add contact is no longer available in BrassRing application starting this release.

RTC internal reference # 125189.

Rules Automation Manager - New Trigger Mechanism

As a part of improving the req form approval work flow, a new trigger mechanism is added in the Rules Automation Manager. This trigger mechanism when configured, identifies the user with whom the approval is pending and sends them an email communication after a preset delay. A req form approval link is added in the communication that is sent to the system user whose approval is pending.



RTC internal reference #123690.

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 **January 2020 release of Onboard on Cloud**:

- Staging - January 9, 2020
- US Production - January 16, 2020

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.

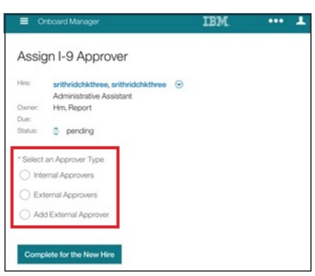
USE IN ONBOARD NEW HIRE

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.

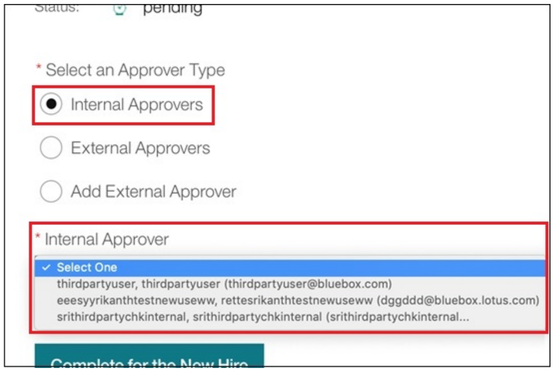
USE IN ONBOARD MANAGER

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.



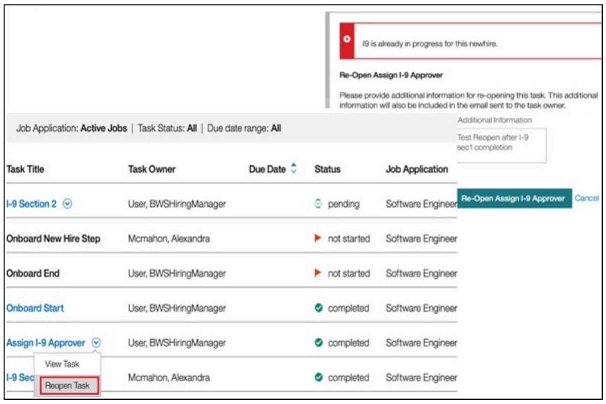
Select an Approver Type: Internal Approvers:



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.

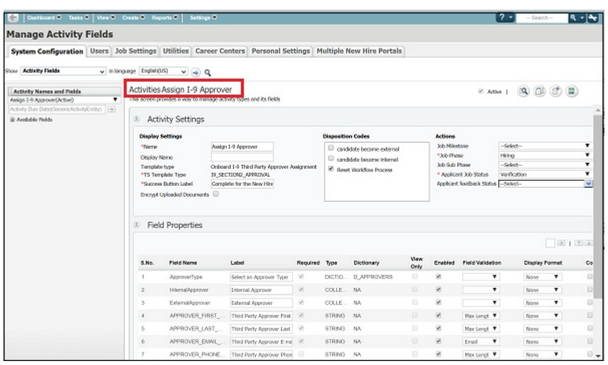
Add External Approver:

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.



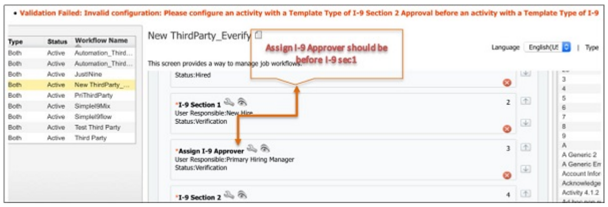
4. On the **Manage Job Workflow** screen, add a new workflow activity called **Assign I-9 Approver** into the workflow. This activity allows clients to configure who the third-party approver for the respective new hire should be.

   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.

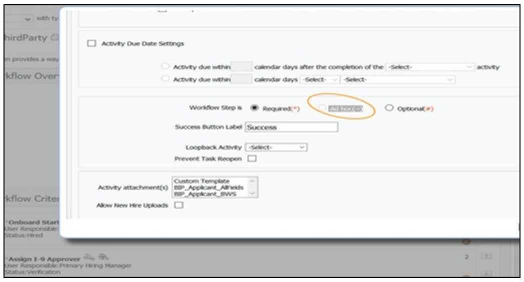
6. Add two new markers to the third-party approval communication template:

- <%=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.

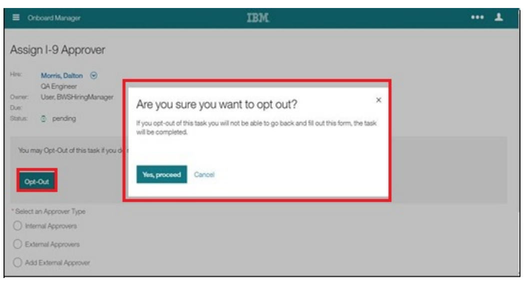
Third-Party Approval - August Enhancements

There are enhancements to Third-Party Approval.

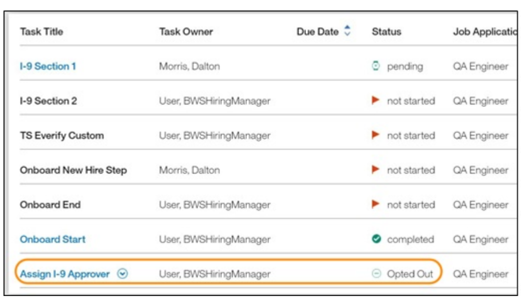
- For **Assign I-9 Approver** task:
  - The **Adhoc** workflow step option is disabled for the Assign I-9 Approver task.



  - 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 Applicatic
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 Task**s page is disabled. Once the approval activity is completed, the link is again enabled.

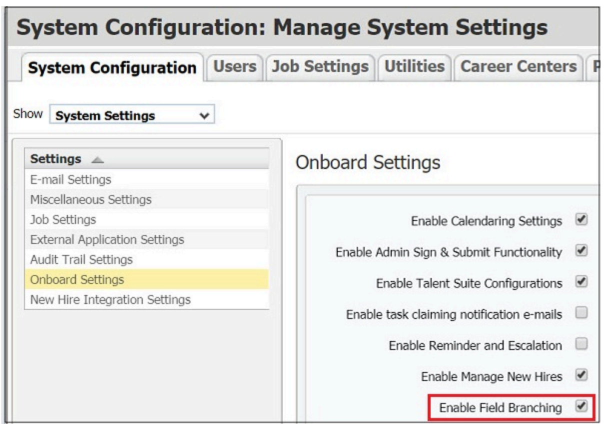
- When the user tries to complete I-9 Section 2, the system checks the **status** of the approval activity:
  - If approval activity exists (in the workflow) and is complete, then I-9 Section 2 is marked as complete.
  - If the approval activity exists and is not complete, then the following error message 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*.

Third-Party Approval - 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.



Third-Party Approval - 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.

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.

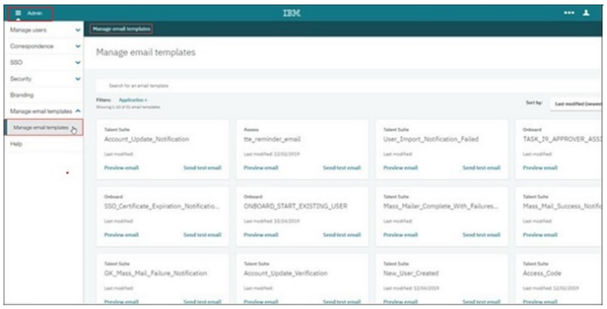
New Manage Email Templates Feature

Manage Email Templates (now available in the **Admin application**) is a new self-service feature that allows the user to manage their own **correspondence email templates**.

This feature was delivered in response to **Request for Enhancements** (**RFEs**). You asked - we listened!

The user can preview, edit, test, and publish correspondence emails using the Manage Email Templates self-service feature. It is available for use by Talent Management Solution products (Talent Suite, Assess, and Onboard).

On the Manage Email Templates landing page, you can change the email template view, add additional templates to the email template view, search email templates, sort templates, filter by application, access the email template to edit the template, preview email, and send a test email.

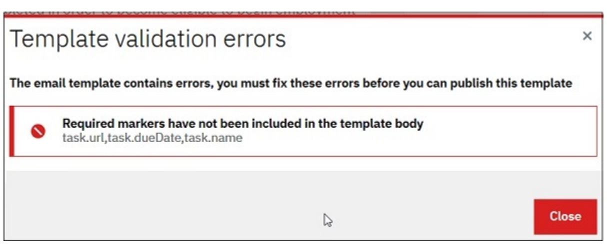


Preview Email is a read-only display that allows the user to preview the details of the email template and confirm it is the one to be edited. It includes all markers that have been selected for the email template. The user can then determine if this is the email template they wish to edit. The different supported languages for the email template are displayed in the Language section. The user can view the Language drop-down list to view the supported languages included with the email template.

Edit Email allows the user to make changes to their email templates as needed for various business needs. Fields in the email template are required or optional.

Test Email allows the user to view how the email would appear to the recipient in read-only format. Marker fields that require an update can be updated in real time (if applicable). A test email is sent to applicable recipients to determine if everything is as needed in the email template.

Note: In some cases, there are **markers that were previously optional, but the product teams have chosen to make them required**. If the following Template Validation Errors message displays, along with the message *Required markers have not been included in the template body*, you need to add newly required fields to your email:



W-4: Reporting Newly Added Fields

The **redesigned 2020 W-4 form has new fields**. These new fields display in W-4 report columns.

New fields for Reporting:

@Column(name = "**HAS_TWO_JOBS**")

private Boolean hasTwoJobs = false;

@Column(name = "**CLAIM_UNDER_17**")

private BigDecimal claimUnder17;

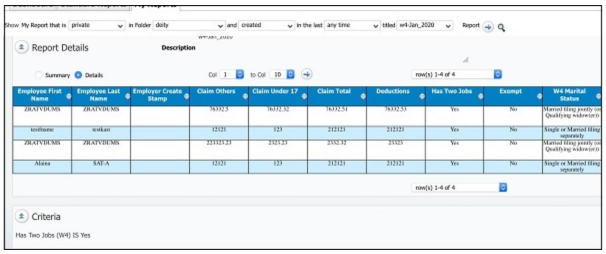
```
@Column(name = "CLAIM_OTHERS")
private BigDecimal claimOthers;

@Column(name = "CLAIM_TOTAL")
private BigDecimal claimTotal;

@Column(name = "OTHER_INCOME")
private BigDecimal otherIncome;

@Column(name = "DEDUCTIONS")
private BigDecimal deductions;
```

Sample report with newly added fields/columns and updated value for W4 Marital Status from Tax Marital Status to W4 Marital Status:



E-Verify: Notification With Use of Employee Email Address

We recently found via testing and client feedback that there was an issue with sending and storing email data as part of the E-Verify calls between IBM and DHS.

We have since then fixed the issue and released this fix as part of the **December release**. This will ensure that **cases will now get created with the email address**. To fix the historical data, we have requested DHS to update the email addresses of all the cases created since the issue began, and they concluded that they cannot add any information to a completed case and that will not affect our overall compliance with the program.

Note: The Onboard application UI/DB has the email displayed since the implementation did not impact the integrations and reports.

US Staging Data Center Relocation

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

Only the US Staging environment will be impacted; US Production will not be impacted.

We are currently targeting April 2nd-6th to complete the relocation and set up. During this time, the Talent Suite, Onboard, and Assess US Staging only environments will be unavailable. Again, production will not be impacted.

Note: Although BrassRing will not be impacted by this move, Talent Suite will, so if your organization accesses BrassRing via the Talent Suite, you will be unable access BrassRing Staging during this downtime.

Action may be required.

Updates to State and Federal Forms

There are updates to maintained forms.

Redesigned W-4 2020 Form Has Inclusions and Exclusions of Fields

Clients who have an **active W-4 integration %integration name%** should have already received a communication from IBM about W-4 updates and related integrations, and the **actions needed**.

Any existing integrations that you may have configured to fetch W-4 data and share with your HRIS and/or payroll systems will be impacted.

Form Updates

UNITED STATES

W-4 2020. Released to US Production on January 2, 2020.

Indiana WH-4

Iowa 44-016

Maine W-4ME

Massachusetts M-4

Michigan W-4 MI

Minnesota W-4MN

Nebraska W-4N

Wisconsin W-220

Wisconsin WT-4

CANADA

Canada TD1X (FR-CAN)

Canada TD1X (English)

Quebec TP10153 (FR-CAN)

Quebec TP10153 (English)

Configurable Changes

The current Onboard release does not include configurable changes. Configurable features must be configured or enabled to be visible and available to users.

Fixed Defects

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

RTC Jazz Number	Defect Description
230450	ESCALATION - TS003067415 - Internal third-party approver list type ahead feature.
230895	TS003102879 - E-Verify Missing Email - Compliance Issue. Note: This was fixed in the December release.
231247	Enable/Disable Hide App Tile along with enable/ disable license for third-party user.
231835	Create Stamp value showing as blank in W-4 task entity in W-4 report.

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