

IBM: BrassRing and Onboard

*BrassRing and Onboard Release Notes  
July 2019*



**Note**

Before using this information and the product it supports, read the information in [“Notices” on page 43.](#)

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, July 2019

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

## **Training and Documentation:**

To access training and 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 Add-on [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](#).

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## 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 resource is not found** displays.

Home > IBM Kenexa BrassRing on Cloud > Next

# Resource not found

✕ Table of contents
Print PDF

IBM Kenexa BrassRing on Cloud welcome page

- + Getting Started with BrassRing and its Addons
- + Frequently Asked Questions
- + BrassRing and Workbench Training Certification and Badges

The requested resource is not found: /support/knowledgecenter/SSEUFV/Hiring\_Users\_Help\_Admin/restricting\_documents\_to\_members\_of\_the\_req\_team.html

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

#### 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 present 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]).

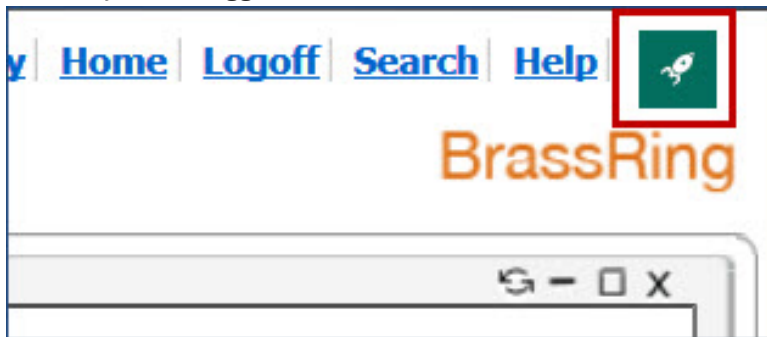
Want to get started on the IBM Responsive Candidate Experiences but don't know where to start? Watch our [Responsive Apply Overview and Configuration Webinars](#) to understand who should be involved, an example project timeline, configuration instructions, and much more! IBM has also hosted multiple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

Starting 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.

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!

### **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**.



- Use communication template for Form Approval routing emails.
- Rules Automation Manager (RAM) - Send Communication Updates
- BrassRing home page - New All Open Reqs Tab
- BrassRing Home Page - My Tasks - HR Status Aging

## 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.

### BrassRing home page - New All Open Reqs Tab

**Note:** This feature is deployed to **Staging environment - Only** with this release. This feature **will NOT be released to Production on July 22nd**. A Production date is to be determined.

Starting this release, based on client request, a new tab is available to BrassRing users to be added to their BrassRing home page. The **All Open Reqs** tab provides users visibility into a list of all open requisitions without having to go further into the BrassRing system to view them. This tab provides users with a grid view and a card view.

How do **existing** users get this new tab?

On the BrassRing home page

1. Select **Edit Tabs**
2. Select **All Open Reqs**
3. Move it to the selected tabs
4. Submit

Home Metrics Dashboard

# Hello, [Name]!

My Open Reqs (1)

Filters (1)

Filter name: Not Saved

Save Filter | Manage Saved

Refine Results

Search within

Req Template

## Edit Tabs

Available Tabs

- All Open Reqs

Selected Tabs

- My Open Reqs
- My Tasks
- My Candidates
- My Reqs Pending Approval
- My Approved Reqs

Submit Cancel

Home Metrics Dashboard

# Hello, [Name]!

Search Candidates

All Open Reqs (18) My Open Reqs (18) My Tasks (0) My Candidates My Reqs Pending Approval (8) More

Filters Actions

| Auto req ID | Title                                     | Positions Remaining | Total | New | 0-Filed |
|-------------|---|---------------------|-------|-----|---------|
| 3BR         | Solutions Expert                          | 6                   | 3     |     |         |
| 4BR         | Solutions Expert - Assess RAM Test        | 2                   | 1     |     |         |
| 5BR         | Solutions Expert                          | 0                   | 0     |     |         |
| 6BR         | Executive Partner                         | 1                   | 1     |     |         |
| 7BR         | Global Support Center Agent               | 3                   | 2     |     |         |
| 8BR         | Executive Partner                         | 7                   | 4     |     |         |
| 9BR         | Global Support Center (GSC) Level 2 Agent | 6                   | 3     |     |         |
| 11BR        | Consultant Info Dev                       | 7                   | 5     |     |         |

Home | Metrics Dashboard

Hello, [Name]!

Search Candidates

All Open Reqs (18) | My Open Reqs (18) | My Tasks (0) | My Candidates | My Reqs Pending Approval (8) | More

Filters | Sort: Auto req ID | Actions

Refresh | Settings | Charts | Lists

| Requisition ID | Title                              | Location/Division | Manager | New | Total |
|----------------|------------------------------------|-------------------|---------|-----|-------|
| 3BR            | Solutions Expert                   | Sample Location 1 | [Name]  | 3   | 6     |
| 4BR            | Solutions Expert - Assess RAM Test | Sample Location 1 | [Name]  | 1   | 2     |
| 5BR            | Solutions Expert                   | Sample Location 1 | [Name]  | 0   | 0     |
| 6BR            | Executive Partner                  | N/A               |         |     |       |
| 7BR            | Global Support Center Agent        | [Location]        |         |     |       |
| 8BR            | Executive Partner                  | N/A               |         |     |       |

**Note:**

- Users see the My Approved Reqs tab only if the user type has the privilege to view their Approved requisitions.
- Admins cannot add the tab automatically for existing users. New users see this tab automatically on their home page if the user type has the privilege to view their reqs in Approved status.

RTC internal reference # 119664.

**Visible Changes**

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

**LinkedIn - API Key Updates**

Clients configure BrassRing LinkedIn integration by adding API keys in Workbench. When candidates log in to Talent Gateways by using LinkedIn, a unique ID is created and mapped by using which their Talent Gateway account is connected to their LinkedIn profile. In order for these candidates to log in to the Talent Gateways by using their LinkedIn profile continuously, this unique ID must not be changed. It was observed that, if clients update their API key in Workbench for any reason, the candidates that were accessing the Talent Gateways by using their LinkedIn credentials, get affected. This happens because, the unique IDs created for these candidates and their mapping is disturbed. Therefore, if clients are required to update their LinkedIn keys for any reason, they are requested to contact their BrassRing representative before attempting the update. In this way, they can obtain information about the number of candidates that might be impacted by updating the API keys.

**BrassRing home page - My Tasks - HR Status Aging**

Starting this release, the My Tasks tab available on the BrassRing home page provides access to the HR Status aging panel. This feature is available to users that have appropriate user type privileges.

To access this pane, users go to the My Tasks tab, select Task type drop-down, and select HR Status Aging.

Task Type: HR Status Aging

Actions

- Approvals
- ✓ HR Status Aging

| Day    | NameCUS | Next Step            | Candidate ref num | Folder |
|--------|---------|----------------------|-------------------|--------|
| ! 5344 |         | Initial Screen       |                   |        |
| ! 5344 |         | Interview (Category) |                   |        |
| ! 4571 |         | Initial Screen       |                   |        |
| ! 4551 |         | Initial Screen       |                   |        |
| ! 3677 |         | Initial Screen       |                   |        |
| ! 3677 |         | Initial Screen       |                   |        |

RTC internal reference # 119877, 121317.

### Communications - Field Length

It was observed that some fields in the Communication templates are shorter than the actual maximum field length. The short field length impacts user experience when they add or edit the communication templates. To enhance user experience, the field sizes of the following fields are enhanced to match the maximum field size.

Path: **Admin > Communication Templates > Add New or [select existing template] > Edit**

- Template Name
- Email Subject line
- Merge fields sidebar
  - Merge fields source
  - Merge fields available from selected source
  - Link to Jobs on Gateway - TG Source
  - Link to Jobs on Gateway - available jobs from selected source
  - Include forms to complete
  - Include forms to view

Communication templates screen before this change:

**Edit communications template**

\*Template name

---

E-mail subject line

Return e-mail address  (optional)

Added by: Support (ualla), BrassRing  
 Added on: 21-May-2015  
 Last edited by:  
 Edited on:

**\*MESSAGE BODY**

Top/Bottom margin

Left/Right margin

HTML Plain text

**Text Editing Area**

Font Name and Size: Arial 13

Font style: **B** *I* U

Lists:

Indenting:

Alignment:

Insert Item:

Colors:

SpellCheck:  English (US)

test

**Merge fields**

Select variable group

<< Add

<< Add numeric field with fo

<< Add candidate form appr

<< Add candidate form appr

[Link to job\(s\) on Gateway](#)

Select a Gateway

Communication templates screen after this change:

**Edit communications template**

\*Template name [Auto] Application Form Completed

**SMS template**

Message

Merge fields

- Candidate first name
- Candidate last name
- Candidate reference number
- E-mail
- Employee ID
- Home phone
- Other phone
- Auto req ID

<< Add

**E-mail template**

To e-mail address Add

E-mail subject line Candidate Application Form Completed

Return e-mail address (optional)

Added by: Tr  
Added on: 20  
Last edited by:  
Edited on:

**MESSAGE BODY**

Top/Bottom margin None

Left/Right margin None

HTML Plain text

Format Font Size

Source

Dear [#RequisitionStd.Manager#],

[#Contact-info.FirstName#] [#Contact-info.LastName#] has completed the Employment Application.

Merge fields

Select variable group

<< Add

<< Add numeric fields

<< Add additional fields

RTC internal reference # 113403.

### Send Candidate Communication - Field Length

When users send candidate communication in various work flows, it was observed that some fields are shorter than the actual maximum length of the field. The short fields results in bad user experience. Starting this release, to enhance user experience the field sizes of the following fields are enhanced to match the maximum field size.

- From
- CC: (non-system users)
- BCC: (non-system users)
- Subject
- Candidate and merge information email box



Send communication screen before this change:

# Send communication

## Email Message

\*From

\*Send to

Candidates  Other recipients

Cc: (system users)

List >>

Cc: (non-system users)

*Separate multiple users by comma (,); this field may not contain spaces*

Bcc: (system users)

List >>

Bcc: (non-system users)

*Separate multiple users by comma (,); this field may not contain spaces*

Subject

## \*MESSAGE BODY

HTML

Plain text

### Text Editing Area


Font Name and Size

Arial 13

Font style

**B** *I* U

Lists

Indenting

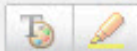
Alignment

Insert Item



Colors



SpellCheck

English (US)

test

Send communication screen before this change:

# Send communication

## Email Message

\*From

\*Send to

Candidates

Other recipients

Cc: (system users)

List >>

Cc: (non-system users)

*Separate multiple users by comma (,); this field may not contain s*

Bcc: (system users)

List >>

Bcc: (non-system users)

*Separate multiple users by comma (,); this field may not contain s*

Subject

Your candidate has accepted an offer for employment

## \*MESSAGE BODY

HTML

Plain text

Format

Font

Size



Source

RTC internal reference # 113404.

### **Document Templates - Field Length**

It was observed that some fields in the Document templates are shorter than the actual maximum field length. The short field length impacts the user experience when users add or edit the document templates. To enhance user experience the field sizes of the following fields are enhanced to match the maximum field size.

- Template name
- Preconfigured document name
- Merge fields sidebar

Documentation templates screen before this change:

**+ Add document template**

**\*Template name**

**Pre-configured document name**

---

**\*DOCUMENT CONTENT**

Top/Bottom margin   
Left/Right margin

HTML Plain text

**Text Editing Area**

Font Name and Size: Arial 13  
Font style: **B** *I* U  
Lists:   
Indenting:   
Alignment:

Insert Item:   
Colors:   
SpellCheck:  English (US)

Documentation template screen after this release:

**+ Add document template**


\***Template name**

**Pre-configured document name**

---

**DOCUMENT CONTENT**  Restricted Offer Letter

HTML Plain text

Format  Font  Size  

Source

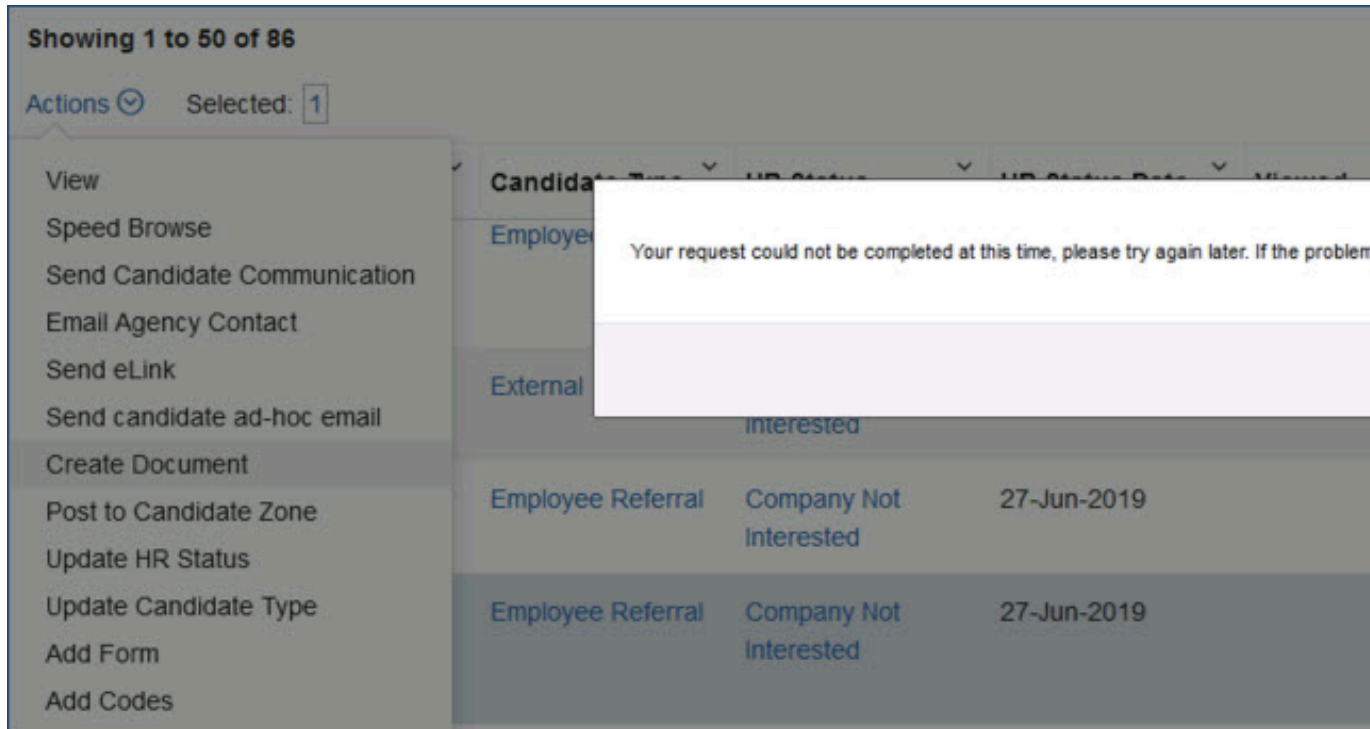
Press ALT 0 for help

RTC internal reference #113405.

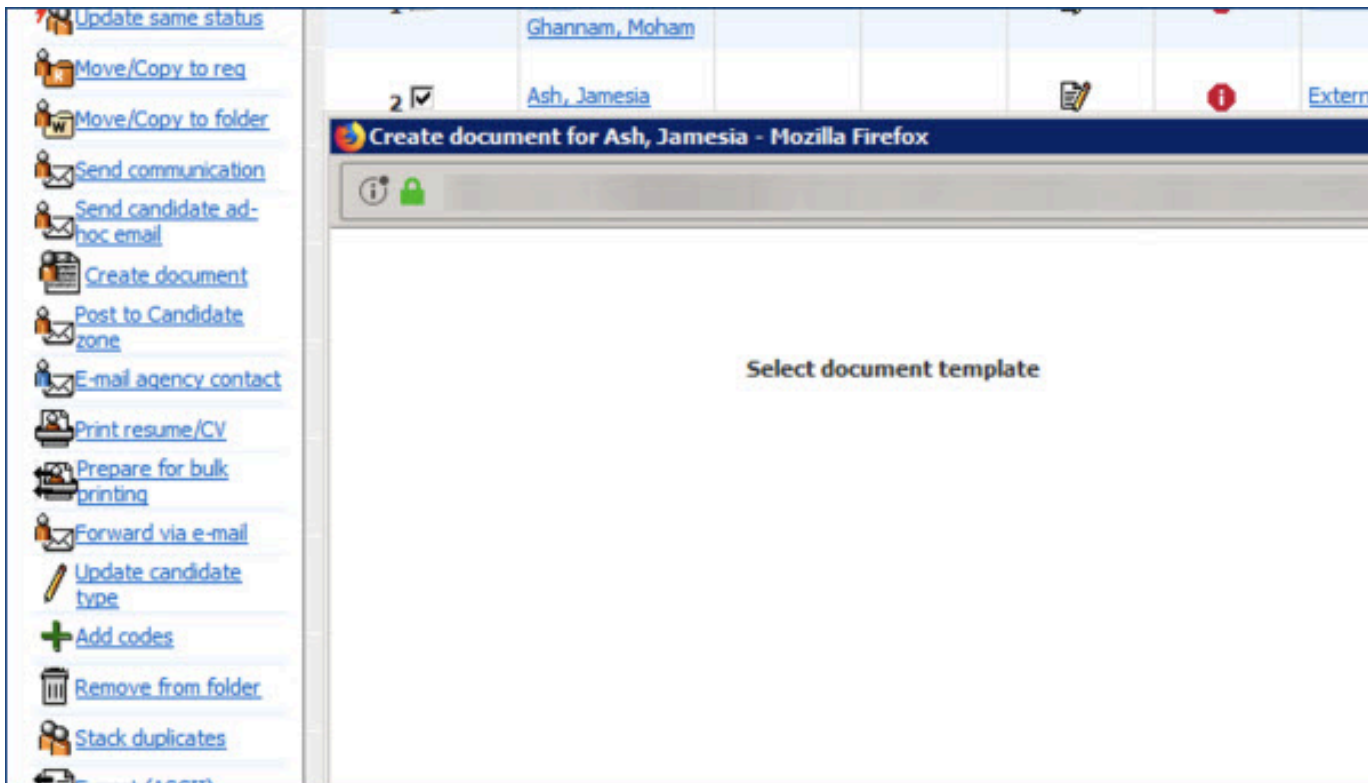
### Document Templates - Workflow Enhancement

When a user tries to send a document to a candidate and there is no appropriate document template that is found for this purpose, in the BrassRing new UI, user sees a transaction message. To improve the user experience, the classic BrassRing behavior of displaying an empty drop-down is brought over to the new UI starting this release. Therefore, starting this release, when users try to send a document to a candidate and there is no document that matches the criteria, an empty drop-down is displayed instead of a transaction message.

Before this release:



After this release:



RTC internal reference # 122133.

### Social Referral email - Accessibility Enhancements

Based on the accessibility testing and guidelines, the following enhancements are made to the Social Referral email feature:

- The View and Apply link that is presented in the body of the email must not be actionable in this screen. Therefore, it is removed from the navigation list and the focus indicator does not focus here.
- When a valid email is entered, users were able to remove the rendered email that uses keyboard navigation. Focus indicator is added here. The X icon to remove the email address is listed in navigation.
- Email address is a required field. There was no indication for required fields. A red asterisk and required text are added now.
- Move input box to be below the field label to be consistent with the rest of the fields in the Responsive Talent Gateways. Help text is added.

RTC internal reference # 120672.

### Social Referral Email - Field Alignment

It was observed that the To field (email address field) and the field in which the email is present are misaligned. Another observation is that when a long email address is entered, the X icon that is used to remove the email address is not displayed. These issues are fixed during this release. Starting this release, the email field is displayed in proper alignment and to full size in screens of all sizes.

RTC internal reference # 121129.

### Translations - State of Odisha

The Indian state of Orissa was renamed to Odisha. This change is already updated in BrassRing. Starting this release, translations for the name of this state are made available.

RTC internal reference # 119859.

### Right to Left Language Translations - Country and State

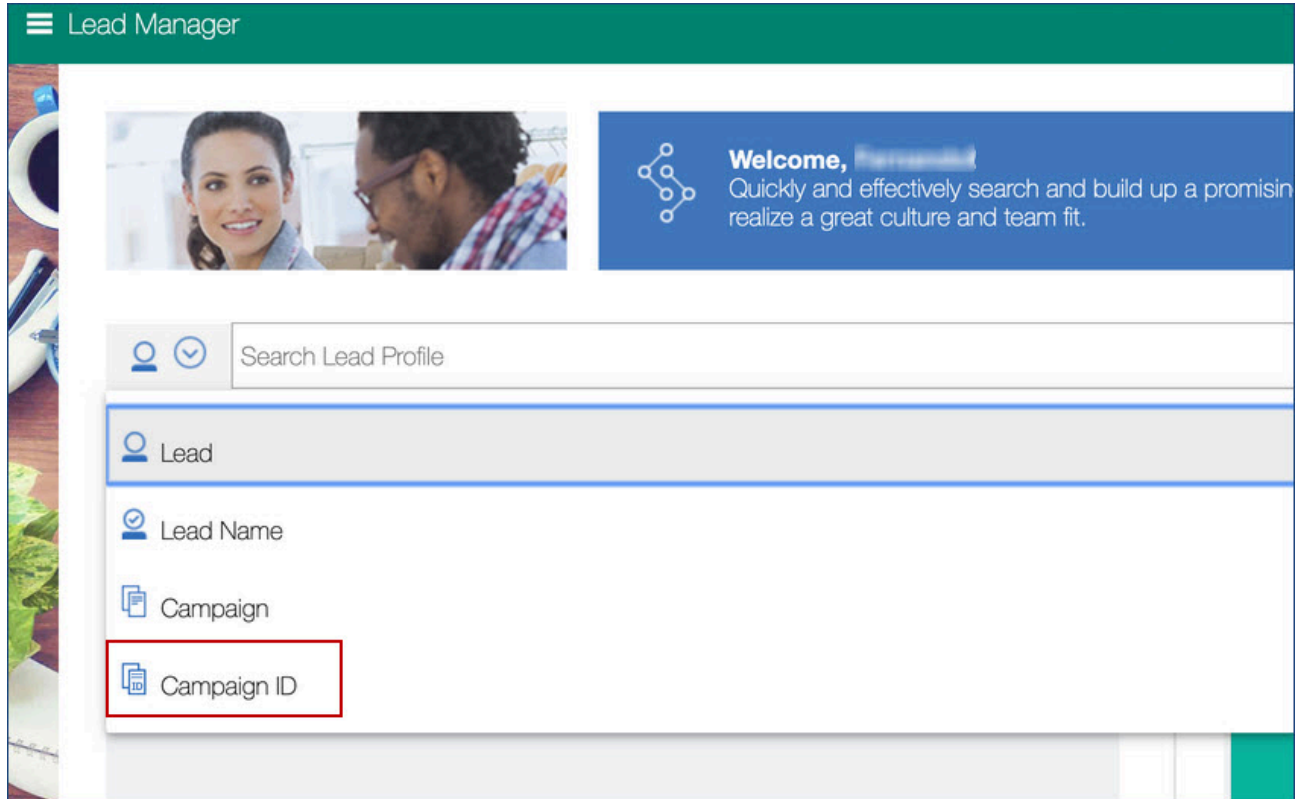
When users access the Talent Gateways with Right to Left locales, it was observed that South Sudan is not translated into Arabic, and the names of the states that are associated with the country of

Israel are not translated to Hebrew and Arabic. In addition, some values are showing in the state and country lists that start with ZZ. Starting this release, the translations for Arabic and Hebrew are displayed and incorrect values starting with ZZ are removed from the Talent Gateway fields.

RTC internal reference # 119792.

### Lead Manager - Search Campaign by using Campaign ID

Search for campaigns becomes difficult if there are multiple campaigns with similar names. To provide better user experience, starting this release, Campaign ID is added to the list of search criteria in the Lead Manager. Campaign ID being unique numeral, search becomes easier and quicker.



RTC internal reference # 115285.

### Lead Manager - Campaigns Created Without Saving

When BrassRing users select manage campaign from a req, a campaign is created and even if no fields are filled, the campaign is getting saved. This behavior creates campaigns with blank values unintentionally. To change this situation, the workflow is enhanced in the following way:

- In BrassRing, users select **Manage Campaign**
- User is then redirected to Lead Manager and an Add Campaign window is opened and filled with req information.
- If user fills the required fields and selects Save and View, a campaign is created.
- If user does not fill all required fields, and selects Save and View, error message is displayed in the existing workflow.
- If user selects cancel, campaign is not created and a message is displayed to that effect.

RTC internal reference # 116400.

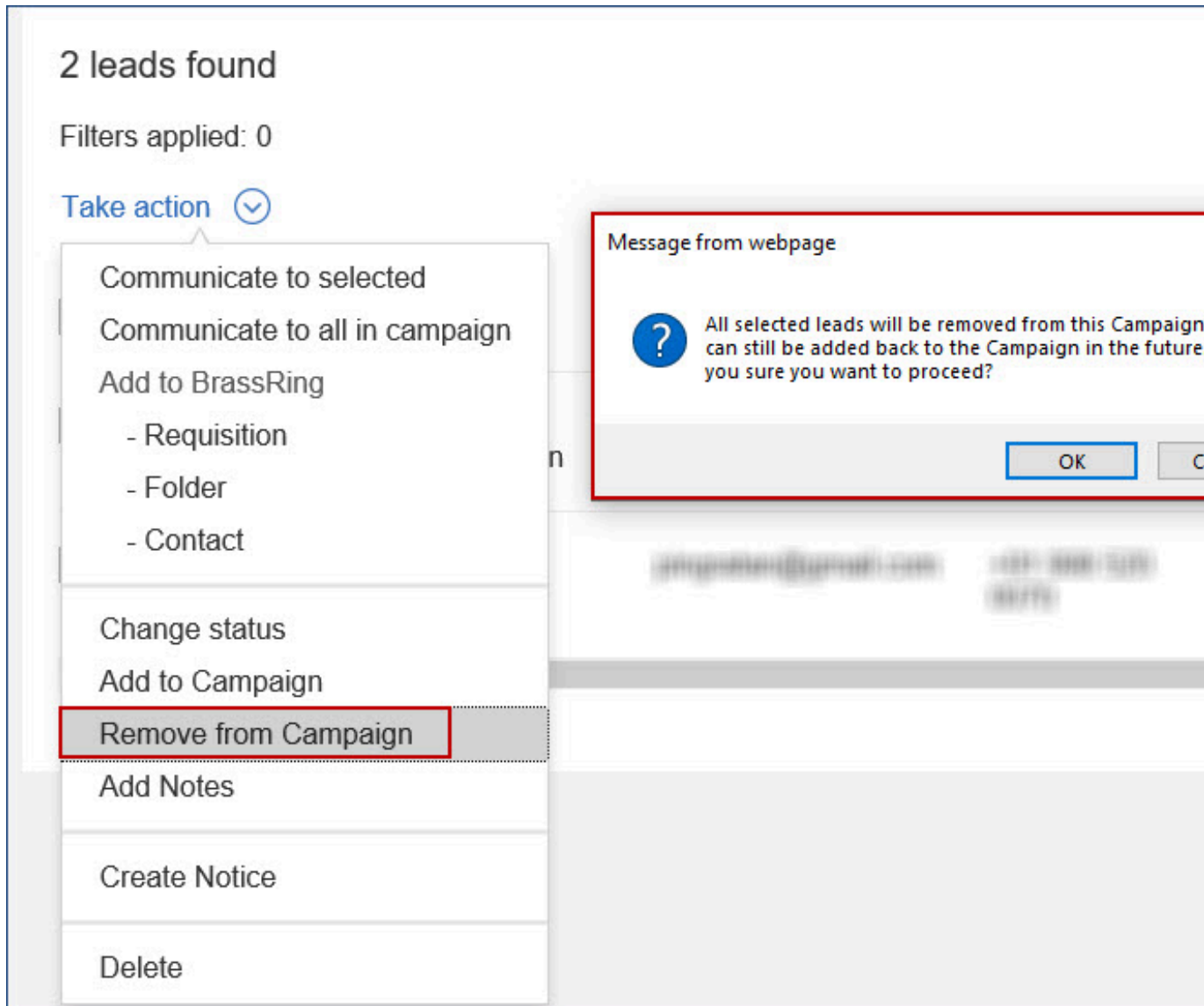
### Lead Manager - Remove Leads from Campaign

Based on client request, a new provision is added in Lead Manager campaigns. Lead Manager users can now remove leads from a campaign in the following steps:

- Users select one or more leads.
- Select Take Action and select Remove from Campaign.



- Alert message is displayed asking for confirmation.
- Select OK to confirm removal from Campaign.




RTC internal reference # 121628.

### **Lead Manager - Attachment Size and Type Enhancements**

#### **Display Uploaded File Size**

When users add or edit a lead in Lead manager, they attach different files that belong to the lead. When users attach files, it helps if the file size is displayed in the attachment screen. Starting this release, the maximum file size is displayed in the Attachments section.

**Attachments** ^



**Upload Attachments**

File size must not exceed 10MB per attachment ⓘ

[Add Attachment](#)

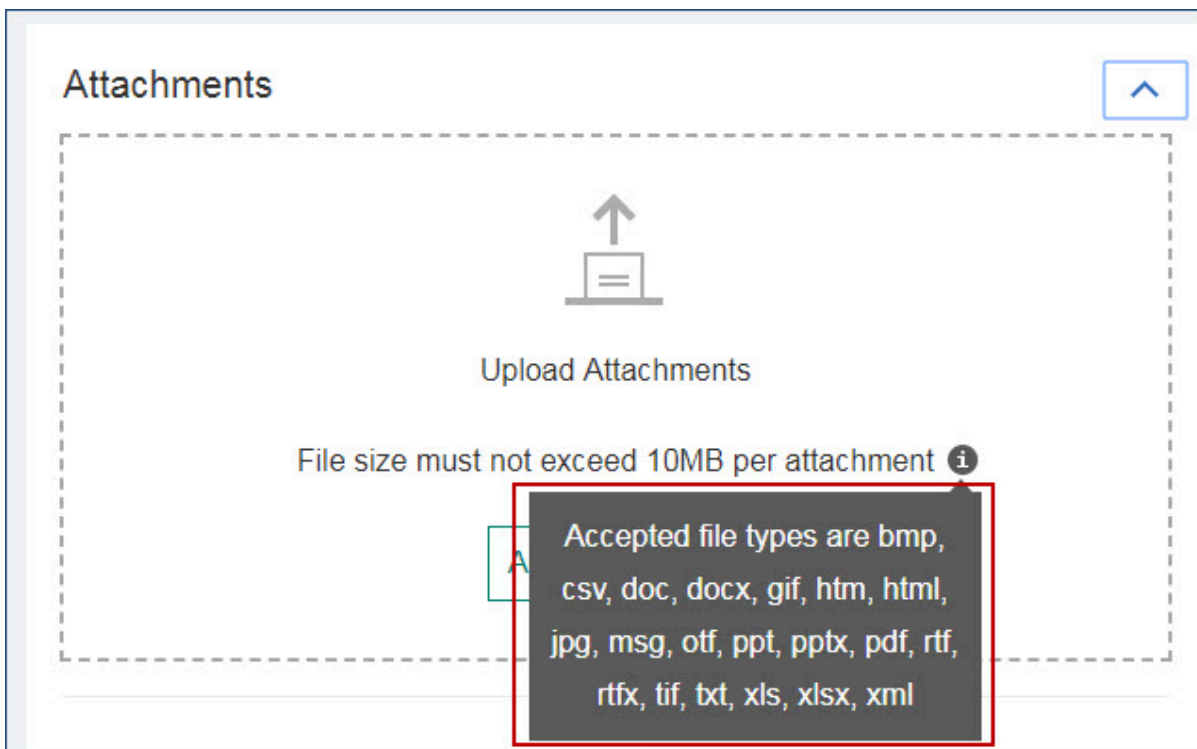
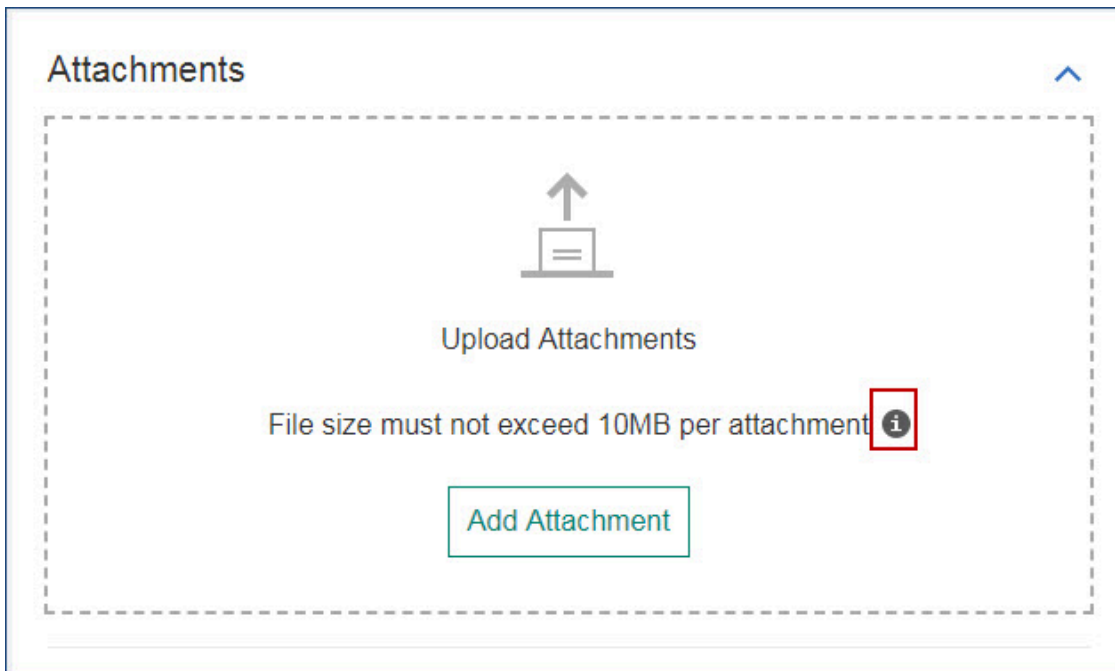
---

|                                |       |   |
|--------------------------------|-------|---|
| Licenses and Certificates.docx | 4 MB  | ✕ |
| List of References.docx        | 12 KB | ✕ |
| Assessment Results.pdf         | 99 KB | ✕ |

RTC internal reference # 92962.

### Upload Additional Document Types

Starting this release, Lead Manager users can add the following additional types of documents from the View/Edit Lead screen - BMP, .CSV, .GIF, .HTM, .HTML, .JPG, .MSG, .OTF, .PPT, .PPTX, .RTFX, .TIF, .XLS, .XLSX, .XML. These files can be uploaded by using the drag and drop feature from this page. Upon hovering mouse over the **i** icon, a tool tip is displayed with the list of all the file formats that are supported for upload.



RTC internal reference # 110745.

### Lead Manager - New Fields in Campaign Profile

Starting this release, three new fields are added in the Campaign profile page. The following are the new fields added to the Campaign profile screen.

- Required Skills
- Preferred Skills
- Soft Skills

Type Company Description

Country:  
United States

Postal/Zip Code:  
Type Postal/Zip Code

State/Region/Province:  
Select option

City:  
Type City

Required Skills:  
Select required skills

Preferred Skills:  
Select preferred skills

Soft Skills:  
Select soft skills

Apply URL(s) ^


Type Apply URL

Type URL Label


Pay and Benefits ^

Benefits Description:  
Type Benefits Description

Overview 


 Email:  
mparsons@yahoo.com

Last Action Date:  
May 27, 2019

 Mobile Number:  
978-930-1237

Email Opt In:  
Agrees

[View lead's contact history](#)

 Cambridge, Massachusetts 02141  
United States

Social media:



Submission Type:  
Bulk Parsing

Required Skills:

Java  
Eclipse

Preferred Skills:

Scala  
NoSQL  
React

Soft Skills:

Problem solving  
Time management

Area of Interest:

RTC internal reference # 120871.

## 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.

### Candidate Form - Approval Process Improvement

**Note:** This feature was released to the Staging environment during Release 18.11.12. Based on client testing, reviews and recommendations, several changes were brought in and this feature is going to be released to Production environment during the current release.

Before this release, the standard sequential Candidate Form approval process would reroute the form for approval if the Approvers were updated or changed exclusively while the form approval was in flight. With this release, organizations can configure their Candidate Form approval process to allow edits to the Approvers without having to restart the whole approval process. This change enhances the user's ability to update approvers, giving them the ability to delegate the approval to another user if the original approver is not available.

- After a candidate form is sent for approval, a new approver can be added or removed from the list of pending approvers. The form need not be rerouted if there is a change in the approvers whose action is still pending.
- After a candidate form is sent for approvals for the first time, if any edits are made to the form, the button's label is changed. Save and Send for Approvals is to **Save and Resend for approval**.
- If the user wants to update the form and does not want to change the approval routing, they must select the Submit button. A warning message clearly mentioning this information is provided stating: **Original approval(s) status(es) will be reset. The form will be sent for new approval(s). If your intention is just to save changes, please cancel and use the submit button instead. Do you wish to continue?**

#### Note:

- This enhancement is only available for the standard sequential approval process only. This change does not impact the Custom Approval Workflow system.
- The form is NOT rerouted for approval if the new setting is enabled and if only approvers were updated or edited exclusively on the req.
- If the original reroute for approval fields is edited AND an approver is updated or edited, the reapproval routing takes precedence over the new setting.

#### How do clients get this feature in Staging?

Navigation to **Workbench > Tools > Forms > Candidate Forms > Edit Form Approvals for the Candidate Form** you would like to edit the approval process for.

- A new field that is called **Bypass rerouting for new approval on form approval changes?** is added.
  - The setting has the tooltip: **When set to “Yes”, form will NOT be rerouted for new approval when the user changes the form approval information. Field level edits made to the form would still trigger rerouting based on configuration set under the Re-approval routing section.**
- The field **Re-Approval Routing** is renamed to **Re-approval routing (excluding form approval section)**.

Before this release:



**⊕ Approve/Decline text area field label:**

Reason for selection [English]

**Approve/Decline text area field input value is:**

Required for Approve only

**Send approval notification?**

Yes  No

Users selected in req/form

Specific system user

**Send decline notification?**

Yes  No

**Re-approval routing**

Save button(s) reset current approval statuses and prompt to send for new approvals

Never

Change to any field (default)

Change to specific field(s)

Hourly\_Rate

RSU\_Value

Salary

Sign\_on\_Bonus

Select

**⊕ Approval routing instructions:**

[Empty text area for routing instructions]

*(This text will appear at the top of the approval pages.)*

**Approval routing order <Offer Form>**


| Approver       | Routing order |
|----------------|---------------|
| Comp Team      | 2             |
| Hiring Manager |               |
| Director       | 3             |
| VP             |               |
| Recruiter      | 1             |
| Finance        |               |

Save

Revert to Saved

Cancel

After this release:

 Edit form approvals

**⊕ Approve/Decline text area field label:**  [English]


**Approve/Decline text area field input value is:**  ▼

**Send approval notification?**  Yes  No

Users selected in req/form

Specific system user

**Send decline notification?**  Yes  No

**Bypass re-routing for new approval on form approval changes?**   Yes  No

**Re-approval routing (excluding form approval section)**  
Save button(s) reset current approval statuses and prompt to send for new approvals

Never

Change to any field (default)

Change to specific field(s)

**⊕ Approval routing instructions:**

*(This text will appear at the top of the approval pages.)*

**Approval routing order <Offer Form>**

| Approver   | Routing order |
|------------|---------------|
| Approval 1 | 1 ▼           |
| Approval 2 | 2 ▼           |
| Approval 3 | ▼             |



As a part of this feature and based on client feedback, the following updates were made:

RTC internal reference # 116383, 109917, 111563, 110400, 110313, 109917, 110403.

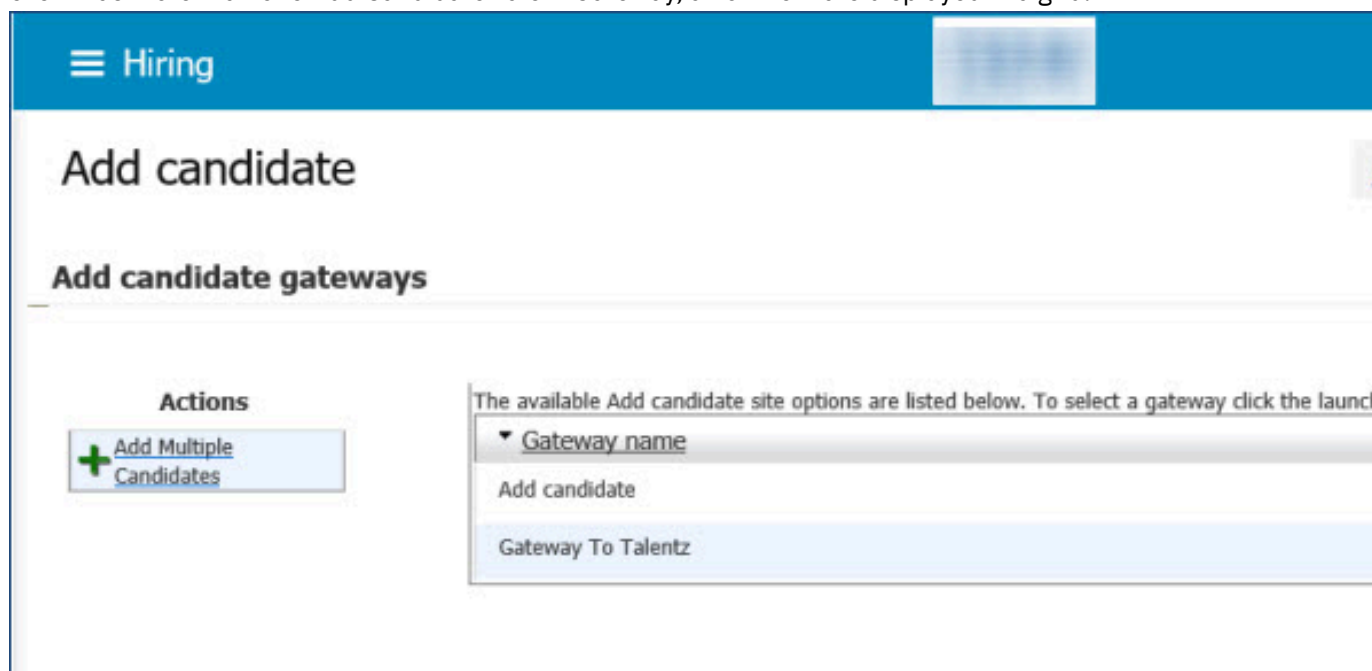
### Basic Talent Gateways - Replaced with stand-alone Gateway Questionnaire

**Note:** This feature was deployed to Staging environment - Only during Release 19.06.03. Starting the current release, this feature is going to be available in the Production environment.

In BrassRing's continuous endeavor to provide responsive user experience in all functional areas, the Add Candidate Talent Gateway experience is enhanced. Starting this release, clients can configure a responsive Talent Gateway to become an Add Candidate Gateway by using a stand-alone Gateway questionnaire. This feature replaces the Basic Talent Gateways soon. Recruiters that add candidates via the Add Candidate Gateway can perform the candidate addition function in a responsive environment starting this release.

Duplicity Check: The system checks on the profile page of the Gateway Questionnaire if the new candidate exists. If the candidate exists, an error message is displayed so that recruiter does not submit a candidate that they already have Talent Record for. Duplicity check uses the Stacking logic that is configured for the respective Talent Gateway. For duplicity check to work, the Talent Gateway setting **Add Candidate** needs to be checked.

BrassRing users with appropriate user type privileges can access the Add candidate Gateway. If the client has more than one Add Candidate Talent Gateway, all of them are displayed in a grid.



### How do clients get this feature?

Workbench Path: **Tools > Talent Gateways > [select a Talent Gateway] > [select Responsive Layout details]**

Two new settings are added in the General section of Responsive Layout details page. **Designate as "Add Candidate" to be launched from Recruiter Experience** and **Perform duplicity check before allowing candidate submission** are the new settings with check boxes. These settings are displayed only when the setting **Sign in availability for candidates** is set to **Disable sign in (disables all sign in related features on this TG)** and a Gateway questionnaire is selected in the **Use as stand-alone Gateway Questionnaire**. By default, these settings are cleared. When either one of these settings is checked, **Sign in availability for candidates** becomes inactive.

## General

### User sign in and session handling

#### Sign in availability for candidates

Disable sign in (disables all sign in related features on this TG) ▼

User inactivity time-out period (in seconds)

### Standalone Apply

#### Use as standalone Gateway Questionnaire

US Internal\_v1.2 ▼

- Designate as "Add candidate" to be launched from Recruiter Experience
- Perform duplicity check before allowing candidate submission

### Embed TG in other sites

[Allow this site to be embedded in other sites](#)

Following is the ideal way to configure a Talent Gateway as an Add Candidate Talent gateway:

1. Create a new responsive Gateway Questionnaire as follows:
  - a. The Gateway Questionnaire must include contact, education, experience, resume or CV, codes, and question widgets oriented towards the "Add Candidate" recruiter experience.
  - b. Ensure that, in this Gateway Questionnaire, as many widgets as possible are optional.
  - c. Ensure that the text widgets provide recruiter-oriented instructions and information.
  - d. Ensure that all text and question widgets are translated for each of your recruiter languages or locales.
2. Create new Full Talent Gateway.
3. In the Responsive Layout details section:
  - a. Set **Sign in availability for candidates** to **Disable sign in (Disables all sign in in related features on this TG)**.
  - b. Select the new stand-alone Gateway Questionnaire.
  - c. Select the check box for the setting **Designate as "Add Candidate" to be launched from Recruiter Experience**
  - d. Depending on your organization's preference, select the check box for **Perform duplicity check before allowing candidate submission**
  - e. Complete the rest of the Full Talent Gateway related configuration settings.
4. After configuring Full Talent Gateway, remove "Designate as" settings from all existing Basic Talent Gateways if any.

#### Note:

- Clients might have many "Add candidate" Talent Gateways configured. However, for best recruiter experience, it is recommended to have only one "Add candidate" Full TG, per locale.
- This feature is not available for Global Talent Gateways. However, clients can configure multiple Full Talent Gateways to have one Add candidate gateway for each locale.

- As of this release, the Basic Talent Gateway remains unchanged. However, it is going to be retired in a phased manner.

RTC internal reference # 96411, 96412, 118407.

### Candidate Forms - Communication Templates for Approval Routing

**Note:** This feature was deployed to Staging environment - Only during Release 19.06.03. Starting the current release, this feature is going to be available in the Production environment.

Previously, when candidate form approval emails were sent, they were simple emails that sought approval and did not have any information. To help approvers approve or reject a candidate form based on information, starting this release, Communication Templates can be configured for candidate form approval emails. Based on configuration, when users send a candidate form for approval, they can edit the communication and can send additional information to the approvers. Depending on the communication template configured, attachments, resume/CVs, and other related information can be added to the email. Based on this communication, the approver can take an informed decision.

Starting this release, when BrassRing users add a candidate form, after they select **Save and send for approval**, the communication template that is configured for the form is displayed. Users can then edit the communication, and send it for approval.

#### How do clients get this feature?

Workbench Path: **Tools > Forms > Candidate forms > [select a Form] > Edit form approvals**

A new section **Select Communication Template** is added in the **Edit form approval** screen. Workbench user can configure a communication template specific to each locale for a form from the Select communication template section.

**Edit form approvals**

Change to any field (default)

Change to specific field(s)

**Approval routing instructions:**

(This text will appear at the top of the approval pages.)

| Client Locale        | Select Communication Template |
|----------------------|-------------------------------|
| English (US)         | None                          |
| Chinese (Simplified) | None                          |
| French (Canadian)    | None                          |
| German               | None                          |
| Italian              | None                          |
| Spanish              | None                          |

**Approval routing order <Interview Feedback Form7>**

**Note:**

- This feature is available in sequential approval process only.
- When a form is configured with Communication Templates in multiple locales, the communication that is sent is in the locale of the first approver. All subsequent approvers receive the communication in the locale of the first approver irrespective of their locales.

RTC internal reference # 112228.

**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.

**Rules Automation Manager (RAM) - Send Communication Updates**

Previously when a Workbench user edited a RAM trigger to add recipient to send a communication, they have difficulty in selecting the correct users. The following changes are made starting this release to improve user experience.

Path: **Tools > Automation manager > Admin > [select a trigger] > Edit rule > Actions > Send Communication > Select users**

- Starting this release, the user selection list does not display Inactive users.
- Starting this release, the user selection list displays a name differentiator that is configured for this client along with the names of the users.

**Note:** Name differentiator can be configured in the client settings section of Workbench. This section is available only for IBM team members.

**Responsive Talent Gateway - Privacy Policy Header**

A new text area is added in the Responsive Talent Gateway configuration screen. **Privacy Policy Header** is added with default value **Privacy Policy**. This field is unavailable and text is removed if the Placement of Privacy policy setting has Disable privacy policy that is selected. When either of the rest of the options are selected, this field is enabled and required.

Path: **Tools > Talent Gateways > [select Talent Gateway] > Responsive Layout**

**Responsive Layout Details - Gateway To Talentz**

You have received an offer.

Reset to default

**Link text - Review document with subsidiary form (e.g., offer)**

Review Offer.

Reset to default

**Privacy Policy for new account creation**

**Placement of privacy policy**

- Disable privacy policy (note: privacy policy / candidate consent is required per EU GDPR)
- As first step in "create account" flow
- Following the qualifying question (as step 2) in "create account" flow

**Privacy policy header**

Privacy policy

**Privacy policy statement which asks consent**

**Privacy policy non-consent message**

Save   Revert To Saved   Cancel

RTC internal reference # 121380.

**Gateway Questionnaire Deactivation - Number of Talent Gateway Associations**

When a Gateway questionnaire deactivation is attempted, if the questionnaire has any associations with either Talent Gateways, or req postings, a message is displayed. This message provides information about the number of req associations, Talent Gateway associations, email associations and so on, the Gateway Questionnaire has. It was found that the number of Talent Gateway associations mentioned in this message is inaccurate. Starting this release, the number of Talent Gateway associations is a sum of the total number of full Talent Gateways and the total number of member Talent Gateways of a Global Talent Gateway.

The screenshot shows the 'Gateway Questionnaires' management interface. On the left, there are action links: 'Add new Gateway Questionnaire', 'Save Gateway Questionnaire as new', 'Update Gateway Questionnaire associations', 'Inactivate Gateway Questionnaire', and 'Publish Gateway Questionnaires'. The main area displays a table with 7 questionnaires. The 'Jobless Submission GQ v1.1' is selected. A modal dialog is open, showing an error message: 'This Gateway Questionnaire cannot be inactivated for 4 full or member Talent Gateway(s), the Questionnaire(s) as a Mobile GQ. Please'.

RTC internal reference # 117983.

### Communication Templates for Approval Routing - Publish

When Workbench administrators publish the forms that use communication templates for approval routing, the following changes happen in the target environment:

- Communication templates that are existing with same name have no changes.
- Communication templates that are not existing in the target environment are created with basic details.

The Difference report or the Publish report provides information about the templates that are created based on the Publish activity.

RTC internal reference # 120228.

### Add New Clients - Stop Automatically Adding new Basic Talent Gateways

Previously, when Workbench administrators with appropriate access added a client, two basic Talent Gateways were added automatically. The Add Candidate and Add Contact Talent Gateways were two basic, classic Talent Gateways that were automatically added when adding a client. Starting this release, in line with the ongoing work to phase out the classic Talent Gateways and Basic Talent Gateways, the automatic creation of these Talent Gateways does not continue.

RTC internal reference # 117776.

## 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 **July 2019 release of Onboard on Cloud:**

- Staging - July 11, 2019
- US Production - July 20, 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.

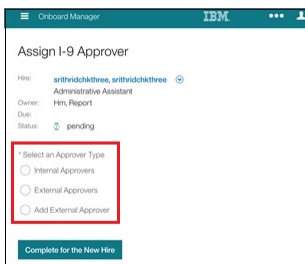
#### USE IN ONBOARD NEW HIRE

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.

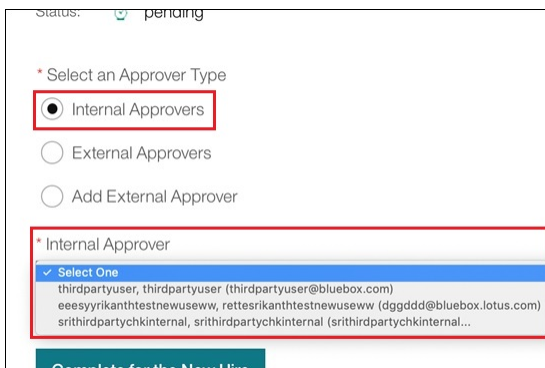
#### USE IN ONBOARD MANAGER

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 next completion

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

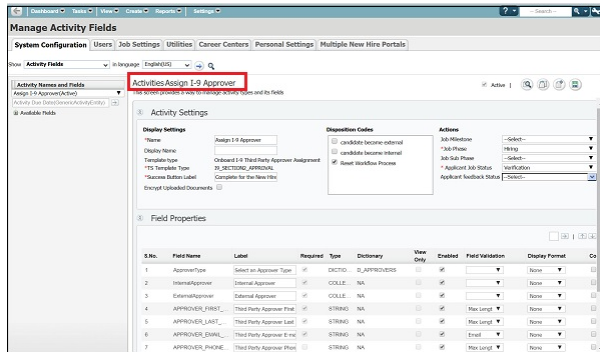
| Task Title            | Task Owner             | Due Date | Status      | Job Application   |                             |
|-----------------------|------------------------|----------|-------------|-------------------|-----------------------------|
| I-9 Section 2         | User, BWSHiringManager |          | pending     | Software Engineer | Re-Open Assign I-9 Approver |
| 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 | Reopen Task                 |

## 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.



- 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.

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 - 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.

### Manage New Hires Page: Add Up to 25 Columns

In Onboard Manager, there is a change to the number of columns that can display on the Manage New Hires page.

Previously, onboarding managers could add up to **7 columns** in the Manage New Hires page.

Now, onboarding managers can add up to **25 columns**.

There is only horizontal scrolling. Known issue: During horizontal scrolling, the check box may disappear from the view. To select it, a user must reverse the horizontal scroll.

### Onboard Manager: New Public Filters

**Public filters** are standard filters that are marked with **IS\_PUBLIC**. They allow onboarding managers to more easily manage new hires.

USE IN ONBOARD MANAGER

There are new **Public filters** that allow onboarding managers to easily manage:

- New Hire Reverification
- New Hire Document Revalidation

With private filters:

- Users can now customize the columns in the table display for each private filter.
- Previously, the column view was standard across the different filters.

### Manage New Hires Pages: New Hire Reverification Public Filter

A new **public filter** allows onboarding managers to easily manage **new hire reverification**.

USE IN ONBOARD MANAGER

On the **Manage New Hires** page:

- The view is set to the **Due Date** standard filter.
- There is a **filtered list** of new hires who have a **due date coming up in the next 90 days** (does not include receipt data). This includes both workflow and standalone data, as well as I-9 Section 2 and I-9 Section 3.
- The **columns** on the page are: New hire name, Working Title, i9ReverificationDate, I-9.
- Selecting a **link in the I-9 column** displays a pop-up with the details of the various I-9 sections and their corresponding statuses:

| i9: Watson Venus <span>ⓧ</span>              |                |           |           |
|--|----------------|-----------|-----------|
| Task name                                    | Task Owner     | Due Date  | Status    |
| <a href="#">I-9 Section 2_ Standalone</a>    | Hiring Manager | 5/30/2025 | Pending   |
| <a href="#">I-9 Section 1</a>                | Watson, Venus  |           | Completed |
| <a href="#">I-9 Section 2</a> <span>⌵</span> | Hiring Manager |           | Completed |

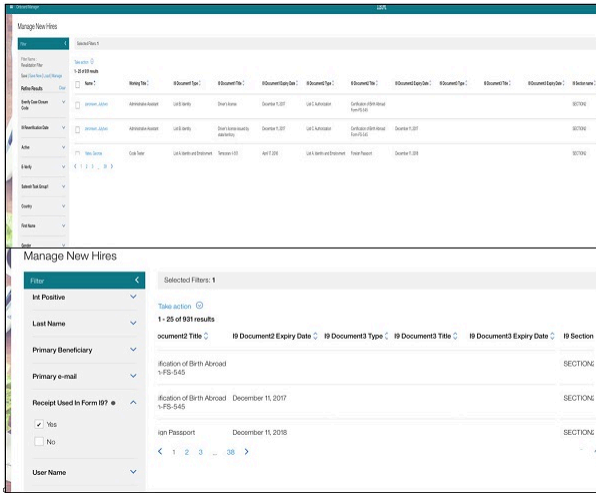
### Manage New Hires Pages: New Hire Document Revalidation Public Filter

A new **public filter** allows onboarding managers to easily manage **new hire document revalidation**.

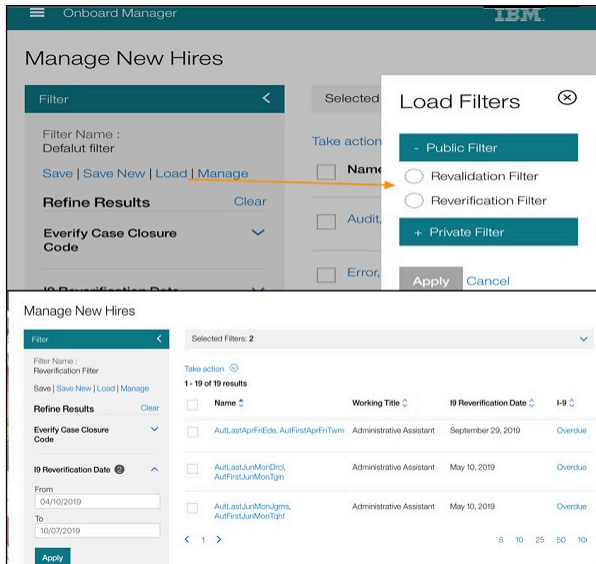
On the **Manage New Hires** page

- There is a **filtered list** of new hires who have not revalidated documents after previously providing a receipt (I-9 Section 2 or I-9 Section 3). This includes both workflow and standalone data.
- The **columns** on the page are: New hire name, Working Title, I9 Document1 Type, I9 Document1 Title, I9 Document1 Expiry Date, I9 Document2 Type, I9 Document2 Title, I9 Document2 Expiry Date, I9 Document3 Type, I9 Document3 Title, I9 Document3 Expiry Date, I9 Section name.

The filter displays the list of new hires who have not revalidated documents after previously providing a receipt (Section 2 or Section 3):



List of new hires who have a due date in the next 90 days (does not include receipt data). This includes both workflow and standalone data, as well as Section 2 and Section 3:



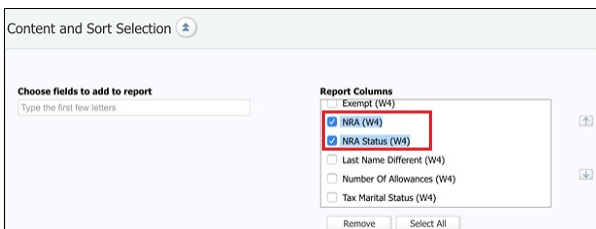
#### W-4: New Entities for Reporting

There are changes to the W-4 for reporting.

USE IN ONBOARD NEW HIRE

Two new W-4 entities were added to the 2019 W-4 form for reporting:

- Non-Resident Alien (NRA)
- Non-Resident Alien Status (NRA Status)



| Employee First Name | Employee ID | Employee Last Name | Employee Middle Initial | Exempt | NRA  | NRA Status |
|---------------------|-------------|--------------------|-------------------------|--------|------|------------|
| Sangevhyer          | 4493966     | rallhjjkewrew      |                         | No     | true | NRAAss     |

## Reports: Up to 75 Columns Are Allowed

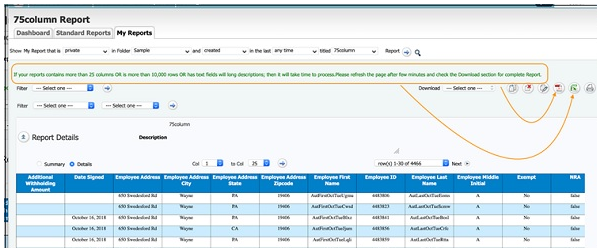
There are changes to reports.

USE IN ONBOARD MANAGER / ONBOARD CONFIGURATION

In **Onboard Manager**, onboarding managers can select **Report** from the **navigation menu** to reach the **Reports** capability in the **Onboard Configuration** application.

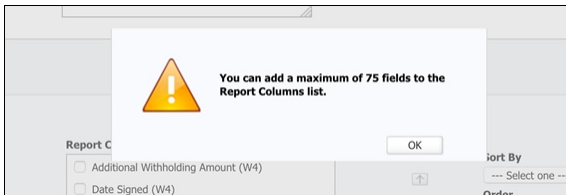
- Onboarding managers can download reports having up to 75 columns in a spreadsheet format.
- If an onboarding manager configures a report with more than 25 columns, then the report is automatically scheduled. The preview of 75 columns will not be available.
- Any report that either has a result set of over 10,000 rows or more than 25 columns will be scheduled for export.

My Reports tab:



| Additional Withholding Amount | Date Signed      | Employee Address City | Employee Address State | Employee Address Zip | Employee First Name | Employee ID | Employee Last Name | Employee Middle Initial | Exempt | IRA |
|-------------------------------|------------------|-----------------------|------------------------|----------------------|---------------------|-------------|--------------------|-------------------------|--------|-----|
|                               |                  | AKV Incorporated NJ   | Newjer                 | 07000                | AufandofTadLynn     | 4483504     | AufandofTadLynn    | A                       | No     | Yes |
|                               | October 16, 2018 | AKV Incorporated NJ   | Newjer                 | 07000                | AufandofTadLynn     | 4483501     | AufandofTadLynn    | A                       | No     | Yes |
|                               | October 16, 2018 | AKV Incorporated NJ   | Newjer                 | 07000                | AufandofTadLynn     | 4483502     | AufandofTadLynn    | A                       | No     | Yes |
|                               | October 16, 2018 | AKV Incorporated NJ   | Newjer                 | 07000                | AufandofTadLynn     | 4483503     | AufandofTadLynn    | A                       | No     | Yes |

Message: You can add a maximum of 75 fields to the Report Columns list.



## Updates to State and Federal Forms

There are updates to maintained forms.

### Form Updates

West Virginia Form WV IT-104 was updated:

- For the non-residence section of the form, instead of text values, there is a drop-down with the following two-letter codes for the following states: KY, MD, OH, PA, and VA. This is for the *am not a resident of West Virginia* field.
- For the four exemption fields, they are now as required.
- If a user tries to save without a valid numeric value or blank, the following error message displays: *Field cannot be blank, please enter a numeric value.*

## Coming Soon!

The following will be available in the August release.

Georgia G-4

North Carolina NC-4

Pennsylvania Rev 419

Rhode Island W-4

Vermont W-4

Wisconsin WT-4A

Wisconsin WT-4

## Configurable Changes

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

### Activity Field Name Configuration: HTML Coding Now Allowed

There is a new client setting that allows users to add **HTML tags** to **field names** for **state forms** and **generic activities**.

USE IN ONBOARD MANAGER AND ONBOARD NEW HIRE

The use of HTML tags provides a more user friendly experience when a user is accessing state forms and generic activities.

## CONFIGURATION

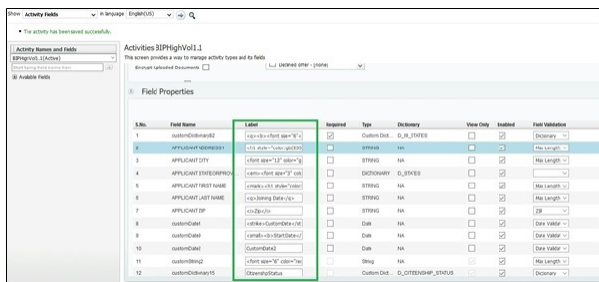
For state forms and generic activities, on the **Manage Activity Fields** screen, there is a new setting: **Allow HTML Coding** check box.

By default, this setting is disabled. When this setting is enabled, the following warning/error message displays: *Using HTML codes can make your activity or site vulnerable to security breaches. Do you want to continue? - Yes/No.*

Only the following list of HTML codes and colors are supported when the new setting is enabled:

- Supported HTML codes:
  - <body> Defines the document's body.
  - <br> Defines a single line break.
  - <style> Defines style information for a document.
  - <div> Defines a section in a document.
  - <span> Defines a section in a document.
  - <header> Defines a header for a document or section.
  - <footer> Defines a footer for a document or section.
  - <main> Specifies the main content of a document.
  - <section> Defines a section in a document.
  - <h1> to <h6> Defines HTML headings.
  - <font> Defines font, color, and size for text.
  - <title> Defines a title for the document.
  - <!--...--> Defines a comment.
  - <p> Defines a paragraph.
  - <b> Defines bold text.
  - <i> Defines a part of text in an alternate voice or mood.
  - <em> Defines emphasized text.
  - <mark> Defines marked/highlighted text.
  - <q> Defines a short quotation.
  - <small> Defines smaller text.
  - <strike> Defines strikethrough text.
  - <strong> Defines important text.
  - <sub> Defines subscripted text.
  - <sup> Defines superscripted text.
- Supported colors: [https://www.w3schools.com/tags/ref\\_colornames.asp](https://www.w3schools.com/tags/ref_colornames.asp)

**Manage Activity Fields** screen: Label Column:



**Onboarding Tasks: Tax Credit Check Confirmation Enhancements**

Work Opportunity Tax Credit (WOTC) Ernst & Young Survey are a part of a new hire’s onboard tasks while onboarding in the Talent Suite. Tax credits are provided to employers for promoting hiring of individuals from certain target groups who might face barriers to fair employment. WOTC checks are therefore required by employers to get federal tax credit and secondly to promote workplace diversity.

**USE IN ONBOARD MANAGER**

On the **Onboarding Tasks** page, enhancements were made for **Tax Credit Check Confirmation** when the task owner is a Recruiter.

| Task Title                                | Task Owner     | Due Date | Status       | Job Application          | Job Application Status | Requisition Number |
|---|----------------|----------|--------------|--------------------------|------------------------|--------------------|
| Onboard End                               | Hiring Manager |          | pending      | Administrative Assistant | Active                 | 507704954770133    |
| Onboard Start                             | Hiring Manager |          | SCOT-plotted | Administrative Assistant | Active                 | 507704954770133    |
| Tax Credit Check Confirmation_ Standalone | Recruiter      |          | SCOT-plotted | Administrative Assistant | Active                 | 507704954770133    |

## CONFIGURATION

**Manage Activity Fields** screen: Responsible User Type is **Recruiter**:

- Reminder E-mail
- Escalation E-mail

**System Configuration** > Users > Job Settings > Defaults > Career Centers > Personal Settings > Manage New Hire Defaults

**Activity Fields**

Activities Tax Credit Check Confirmation

This screen provides a way to manage activity types and fields.

**Activity Settings**

Activity Settings

Display Name: Tax Credit Check Conf. | Template Type: Tax Credit Check Confirmation | Template Type: Tax Credit Check Confirmation | Success Button Label: Success

Employment Status:  Applicant Request |  candidate become external |  candidate become internal |  external offer (strong) |  Declined offer - compensation

Accounts: Job Machine: -Select- | Job Phase: Hiring | Job Sub Phase: -Select- | Applicant Job Status: -Select- | Applicant Feedback Status: -Select-

Forward Uploaded Documents:

**Stand Alone Activity Settings**

Responsible User Type: Recruiter

Reminder E-mail  
The reminder should be sent: 1 days before the due date.

Escalation E-mail  
The escalation should be sent: 1 days after the due date.

Additional Recipients: CC: -Select- | User Type(s): -Select- | Notify: -Select- | Notify Manager: -Select-

Globalize: Globalize: -Select- | Globalize: -Select- | Globalize: -Select- | Globalize: -Select-

## Fixed Defects

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

| RTC Jazz Number | Defect Description  |
|-----------------|---|
| 218358          | TS002319530 - Escalated - Errors occurring in Onboarding for I-9 Administrator user type.   |
| 218582          | Able to reopen Assign I-9 Approver when we reopen Section 2.  |
| 219795          | Skill Case #TS002390562 - Prod US - Tasks still showing as pending in Currently Onboarding view in View Onboard Tasks (Skill Case #TS002397111 - Skill Case #TS002395150) |
| 219891          | Skill Case #TS002395150 - Prod US - New hire onboarding activities show as pending though all the activities are completed.   |
| 219919          | The validation message is wrong after adding the 76th column to the report.   |
| 220306          | Export is not working when the results are more than 2000 records even if the setting in misc is set to 10000 for Report export limit.                                    |
| 220385          | Sorting not working as expected for newly added columns in Manage New Hires page.   |



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