IBM: BrassRing and Onboard

BrassRing and Onboard Release Notes March 2020

Note

Before using this information and the product it supports, read the information in "Notices" on page 27.

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, March 2020

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

Training and Enablement Sessions:

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

eLearning and User Documentation:

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

Browser and Language Support:

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

Badge and Training Courses:

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

Downloadable Release Notes:

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

BrassRing

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

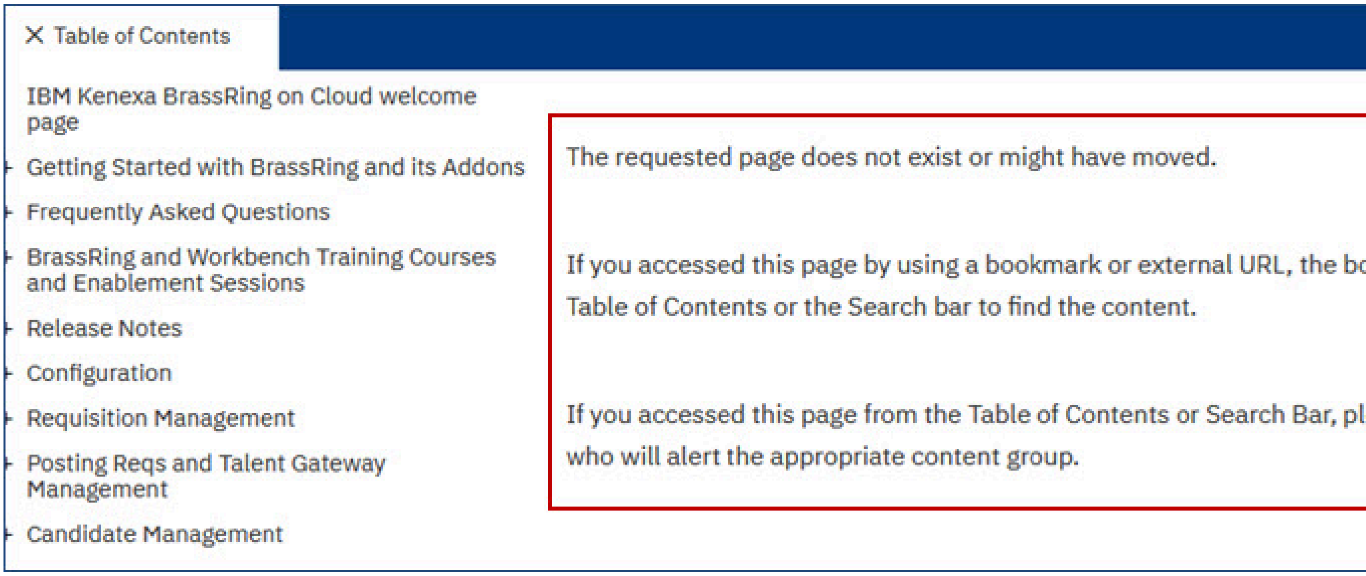
Refer to the BrassRing Welcome page on the IBM Knowledge Center for a **Pre-Release** version of the BrassRing Release Notes.

Client Reminders

The **Client Reminders** section reminds clients of recently distributed important notices and links to comprehensive documentation and training for the special features recently introduced.

IBM Knowledge Center - Broken Links

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



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

End of Support for Classic Talent Gateways

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

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

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

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

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

Support has been discontinued for:

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

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

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

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

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

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

Action May Be Required:

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

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

Client Training and Enablement Sessions

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

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

Enhancements - You Asked We Listened

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

Requests For Enhancement (RFEs)

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

- Add merge tokens directly to communication subject line.
- Referral availability indicator is changed on the Social referral Talent Gateways. Instead of indicating non-referable jobs, a star is prefixed to the jobs that can accept referrals.
- Clients can configure the Save as new Req feature to avoid display of field responses based on user types.
- Lead Manager pagination now has a text box. Users can key in the page number to navigate to the page directly.
- Last access date is a new column added to the User Export report in the Workbench. This column's data allows differentiation between System users and non-system users of BrassRing.

- While adding or editing a req, the sections that have at least one mandatory field are open by default.
- Starting this release, BrassRing administrators can add merge tokens to the subject line of communications in templates.
- Speed browse features for candidate forms is available as dark launch in this release.
- Talent Gateway job search facets are enhanced. When there are more than three options in a facet; Text boxes are displayed to key in search criteria and facets can be collapsed.

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.

Speed Browse - Forms

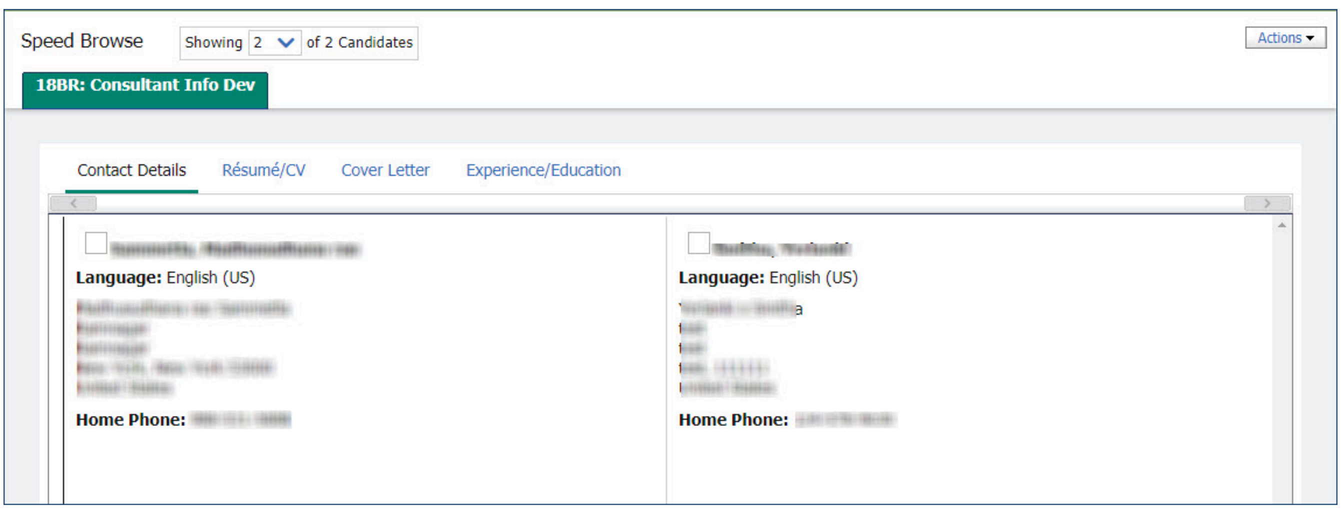
Note: This feature is deployed to Staging environment - Only with this release. This feature **will NOT be released to Production on March 16th, 2020**. A Production date is yet to be determined. Visit the upcoming release notes for status updates on this feature.

The Speed Browse feature in BrassRing allows users to compare candidate Talent Records and taking various actions while going through different sections of the Talent Record. Starting this release, the Candidate forms are available under the Speed Browse feature. Using this feature, BrassRing users with appropriate privileges can take actions on the forms.

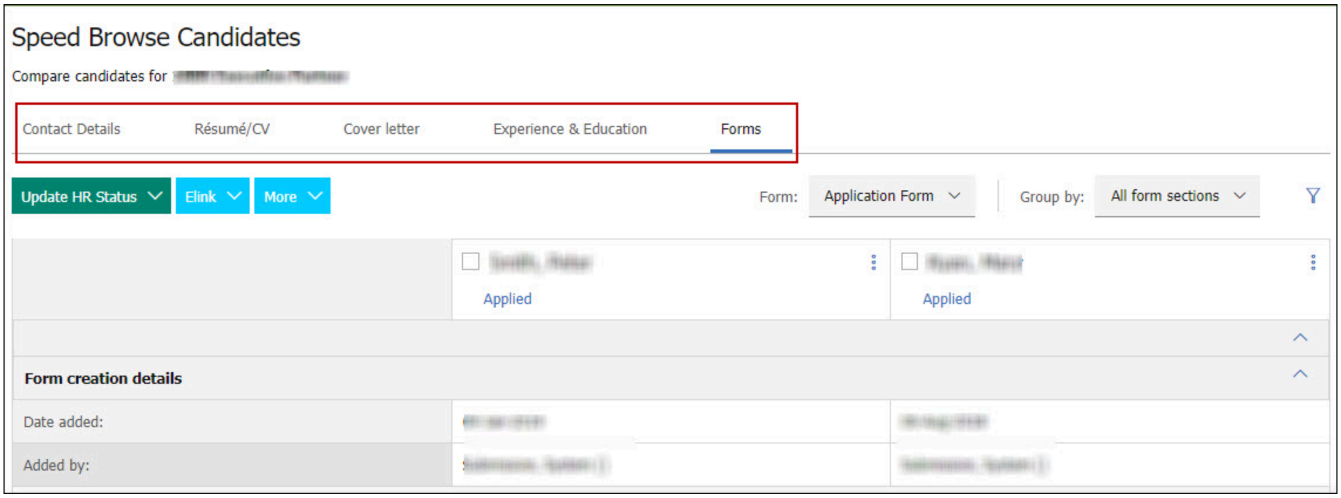
If the selected candidate does not have the required forms, the candidate is excluded from Speed Browse.

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

Before this release:



After this release:



RTC internal reference # 125398.

Visible Changes

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

BrassRing - Interview Manager

Note: This feature was deployed to Staging environment - Only during release 20.02.10. This feature is going to be deployed to the production environment during the current release.

IBM announces a smart, intuitive and efficient way of creating, scheduling and managing interviews between interviewers and candidates from within the BrassRing application.

The **Interview Manager** is a feature in the BrassRing application that allows users to perform various interviewing related activities. Following are a few of the activities that can be performed by BrassRing users with appropriate user type privileges using Interview Manager.

- Adding and managing interviewers.
- Managing interviewer schedules.
- Verifying availability of candidates for interviews.
- Creating various types of interviews.
- Sending candidate and interviewer communication.

Various aspects of the Interview Manager feature can be configured from the BrassRing Workbench by the workbench users with appropriate privileges. The Interview Manager calendar can be integrated with Outlook 365, a part of Microsoft Office 365 Suite.

Detailed documentation regarding various features of the Interview Manager, their configuration, and frequently asked questions is available on the IBM Knowledge Center at the following pages:

- Interview Manager - Features
- Interview Manager - Frequently Asked Questions (FAQs)
- Interview Manager - Configuration

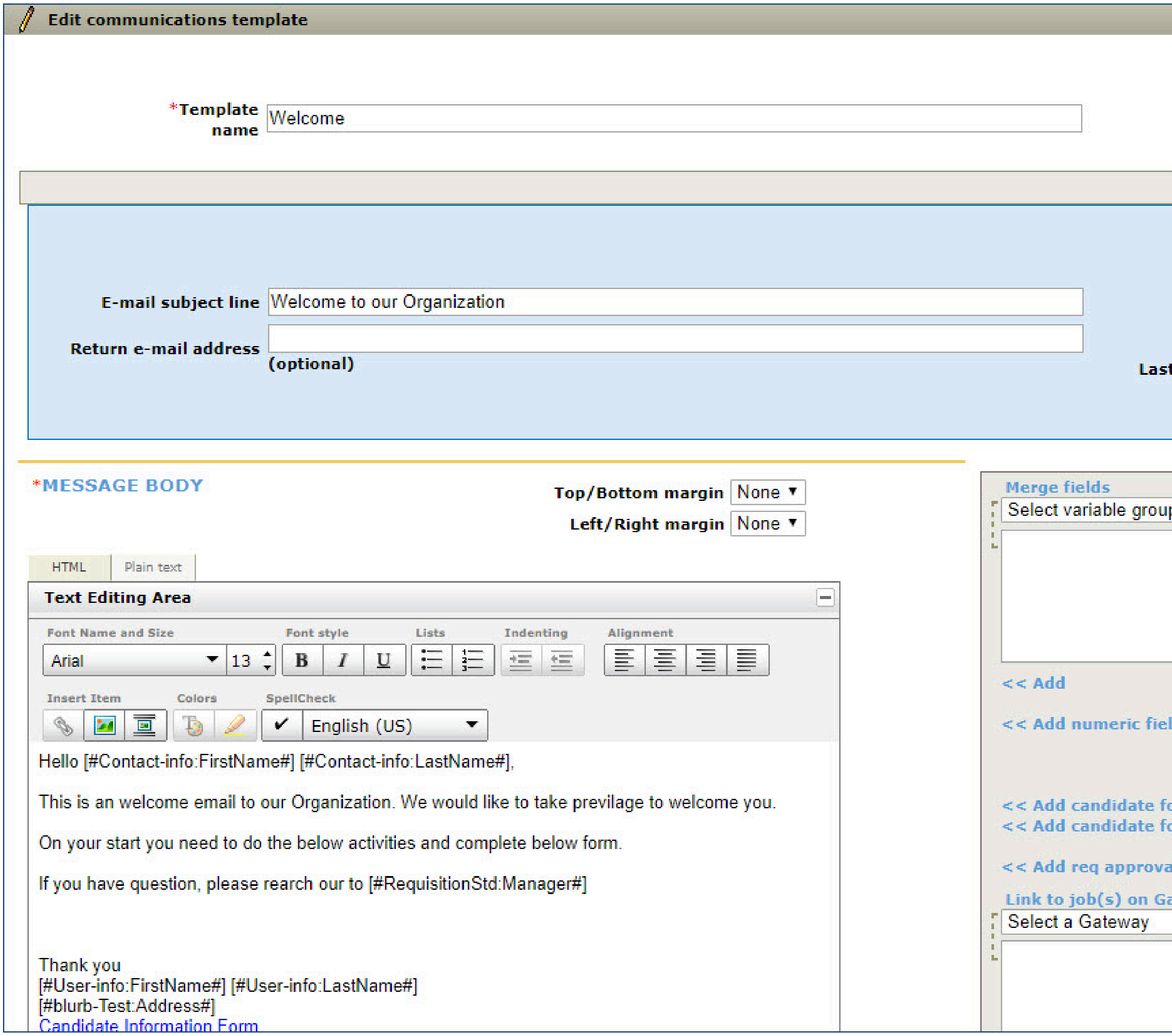
Communications - Add Merge Tokens to Subject Line of Communication Templates

Previously, addition of merge tokens to the Subject line in communication templates restricted to a few tokens. There was no option to select or add the tokens from the template screen. The work around to add tokens, was to add them in the body of the communication template and then cut-paste to the subject line.

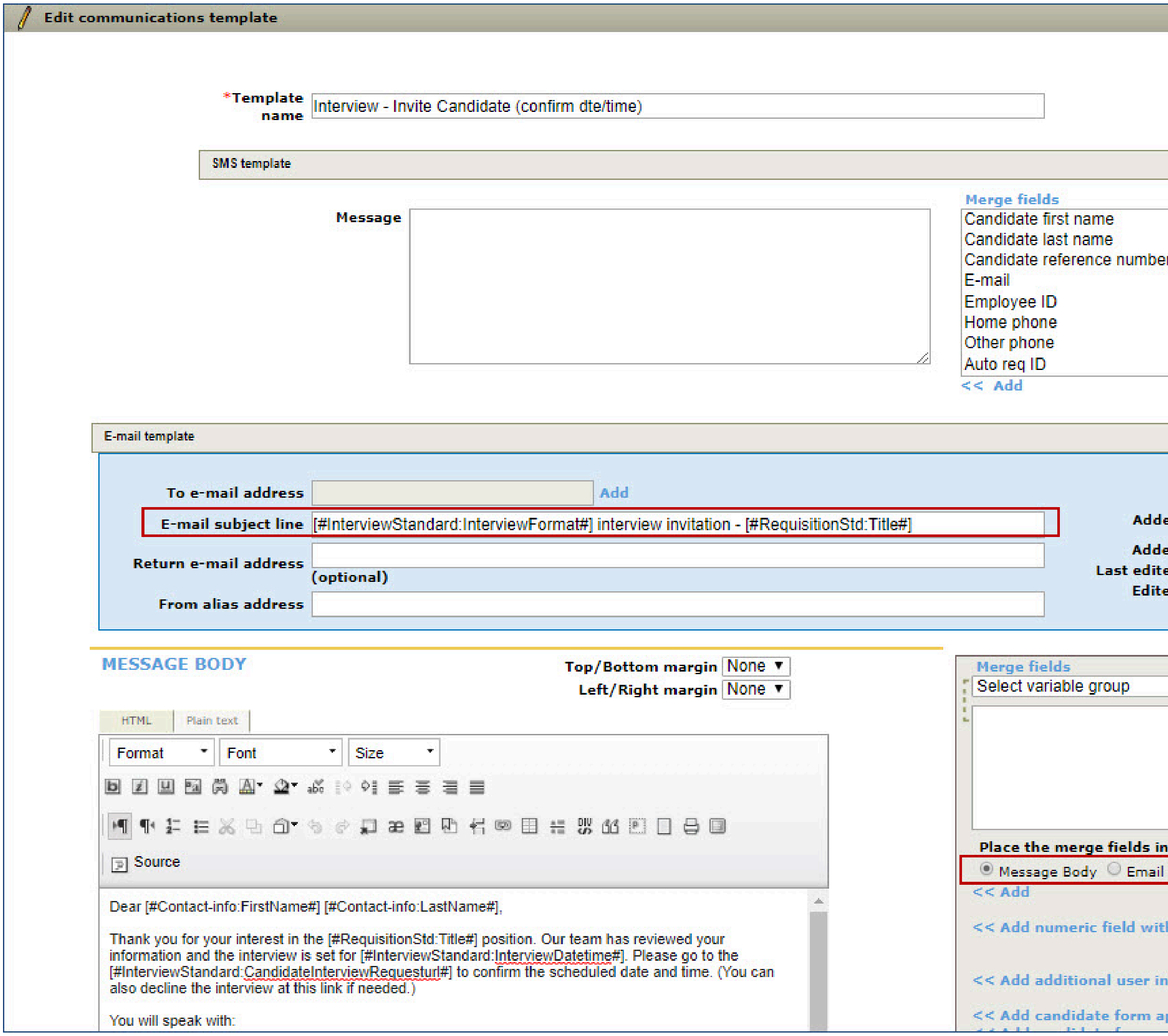
A new radio button is added in the add or edit communication templates page. The tokens that can be added in the subject line are now available in the Merge Field list. BrassRing administrators with appropriate user type privileges can now choose between the communication body or subject line while adding a merge token by using this radio button. By default, the option 'Message body' is selected. BrassRing administrators can select merge tokens from users, candidates and reqs to add to the subject line. The length of the subject line is restricted to 200 characters. An error message is displayed if the character limit is exceeded.

The same restrictions that apply to adding merge tokens to the message body are applied to the subject line as well.

Before this release:



After this release:



Talent Gateway - Job Search Enhancements

Starting this release, a new feature is available while candidates perform job search on the Talent Gateways. A search text box is added to the existing facets. When there are more than three options available in each facet:

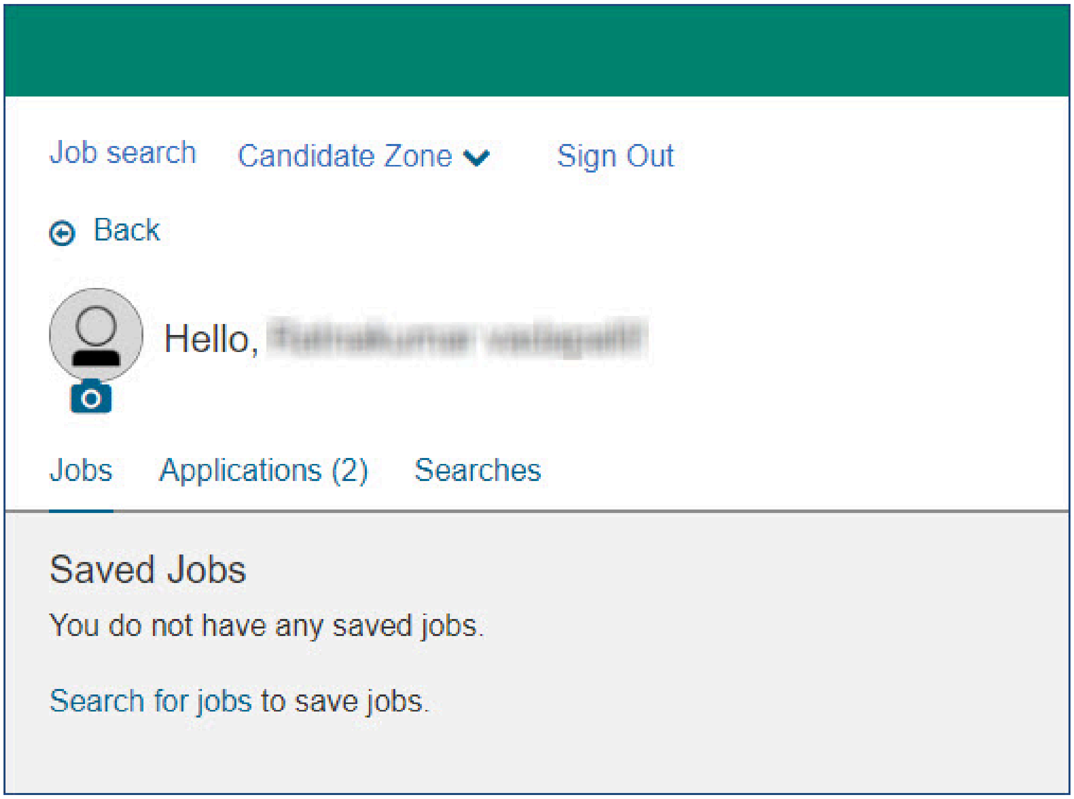
- A text box is displayed so that candidates can key-in text to narrow down the results
- The facets can be collapsed by the candidates to avoid seeing too many options while performing a search.

These enhancements reduce the time and work while performing a job search and improve candidate experience.

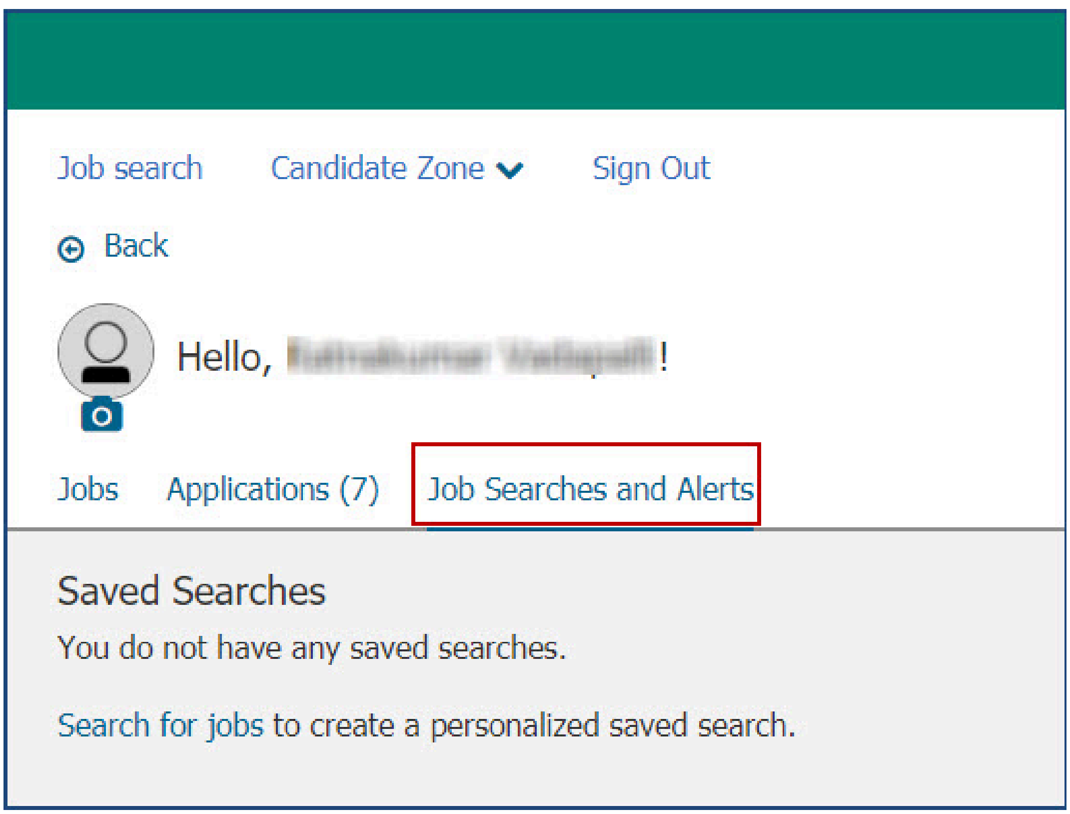
Dashboard - Searches Label

Starting this release, the label for the Searches tab in the Dashboard of the Candidate Zone is updated to Job Searches and Alerts. This change is to ensure clarity about where can the candidates find alerts about the jobs and their searches.

Before this Release:



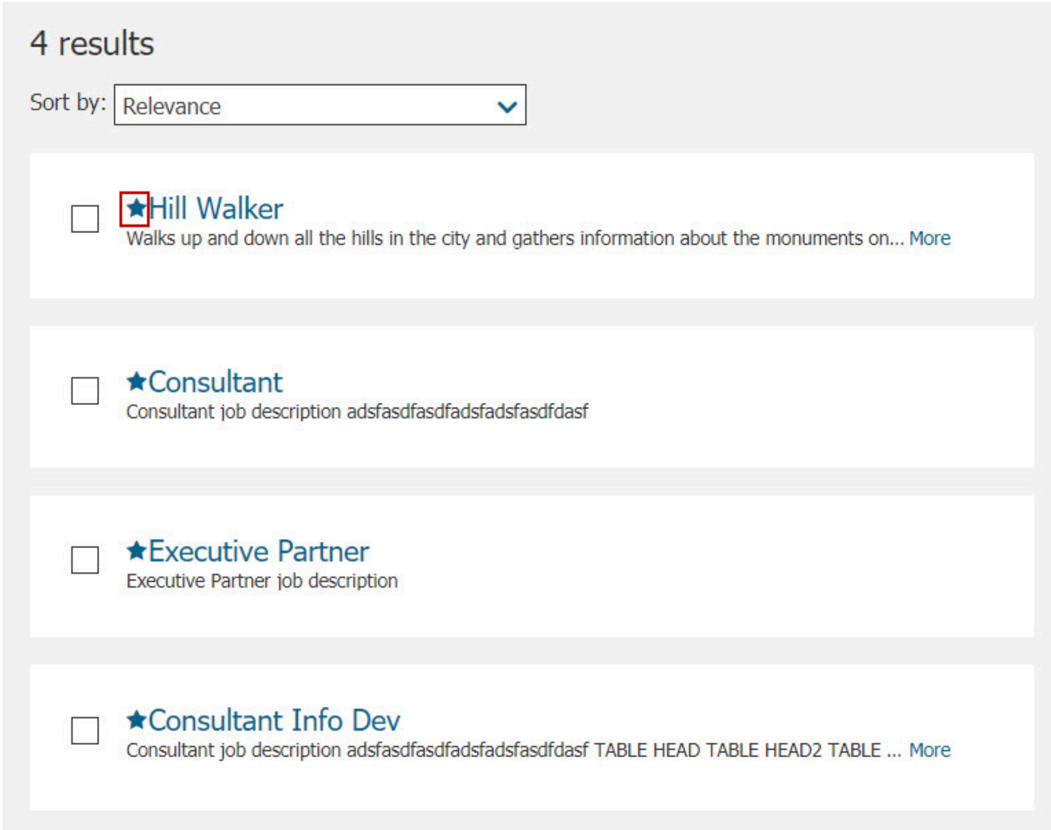
After this Release:



RTC internal reference # 127394.

Talent Gateways - Social Referral Indicator

Starting this release, on Social Referral Enabled Talent Gateways, all jobs that are available for referral display an indicator. A star is prefixed to all the job titles that can accept referrals. When hovered with mouse cursor over the star, the text **Allows Referral** is displayed.

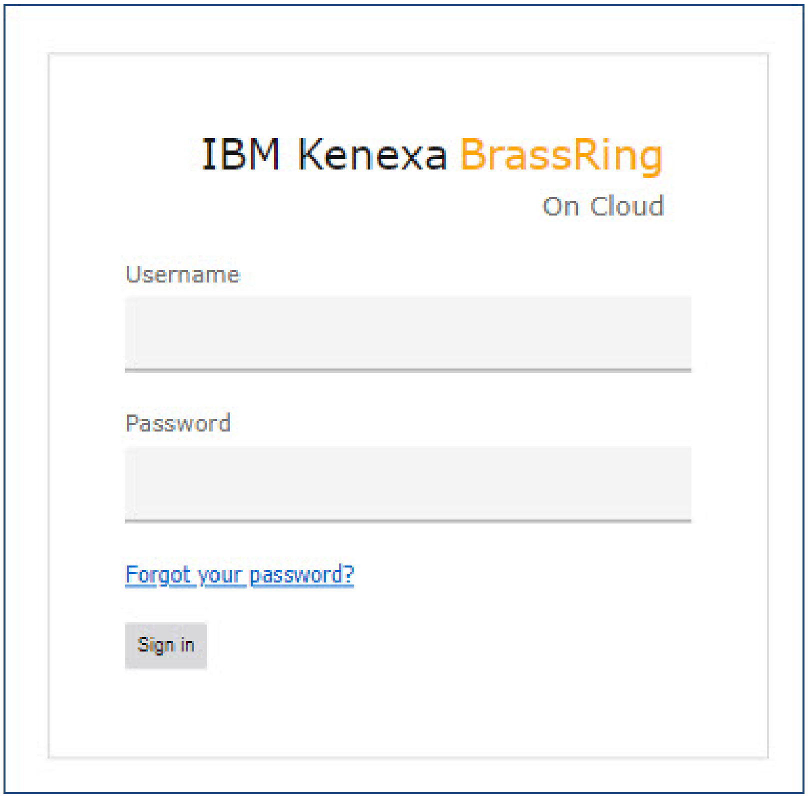


As a part of this change the circle slash icon, that used to be prefixed to a req when the req is not available for social referral is removed.

RTC internal reference #127397.

BrassRing Log In Screen - Enhancement

Starting this release, for stand-alone BrassRing, the log in page is enhanced to be mobile responsive. The fields can be easily filled even while being accessed from a mobile screen. This is not applicable for clients that access BrassRing via the Talent Suite application or single sign-on.



RTC internal reference # 122745.

BrassRing - Home Button Enhancement

Previously, when users were working with BrassRing on multiple windows or tabs, selecting the home button in one tab closed the rest of the BrassRing windows.

To improve user experience, this issue is addressed. Starting this release, when the home button is selected in one window, the rest of the tabs or windows remain on the same screen of BrassRing. The current screen moves to the home screen.

RTC internal reference # 127774.

Talent Gateways - New User Navigation

Previously when a new user logged into the Talent Gateways after creating their account, they were redirected to the Dashboard screen of the Talent Gateway. To improve candidate experience, the candidates are now redirected to the Profile section of the Dashboard so that they can complete their profile information. Existing users returning to the Talent Gateways by logging in, are redirected the Dashboard as usual. Similarly, when a user logs in to the Talent gateway through a specific workflow that leads to an action like applying for a job, they would continue to the action and would not be redirected to the profile section.

RTC internal reference # 127186.

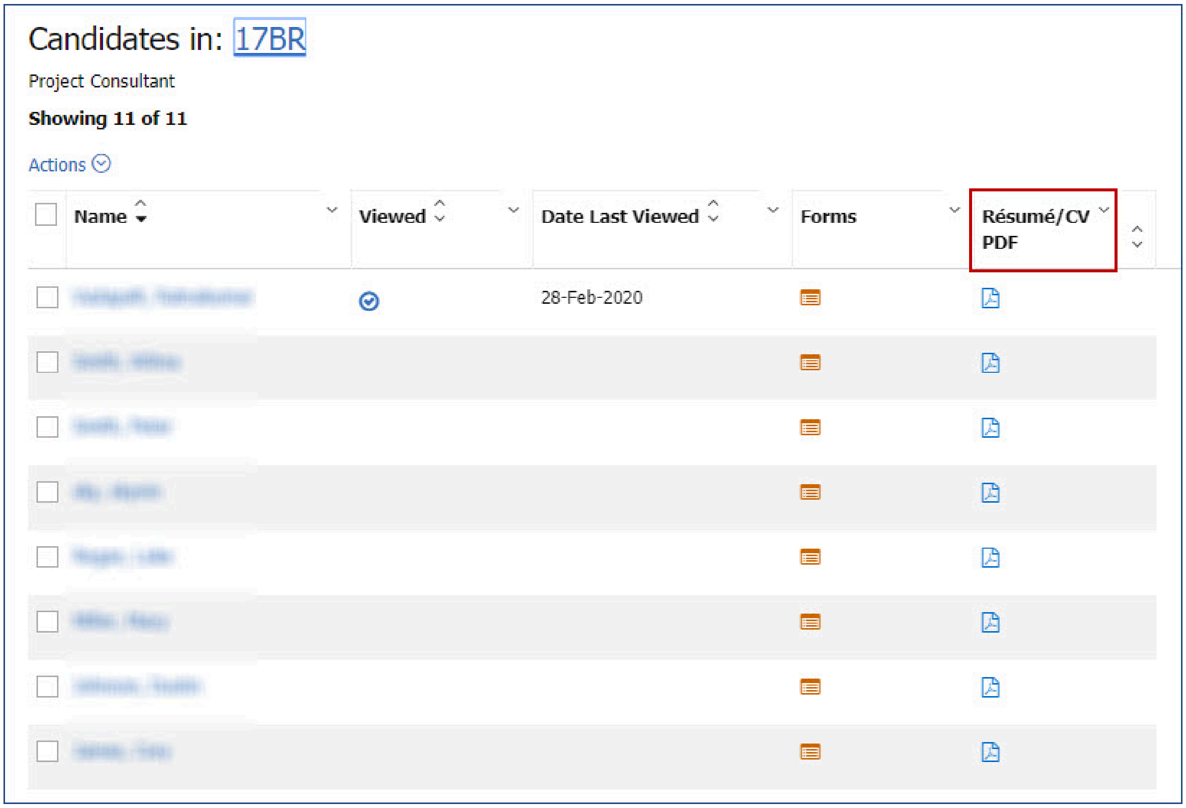
Candidate Account Retrieval Tool - Enhancement

Previously, the candidate account retrieval tool did not fetch information when provided with first and last names if the candidate was added via candidate import. This is now addressed and the Talent Gateway profile information of the candidate is fetched even when the candidate is added via candidate import if the candidate has previously logged in to the Talent Gateway.

RTC internal reference # 127665.

Reqs - Resume Column Updated

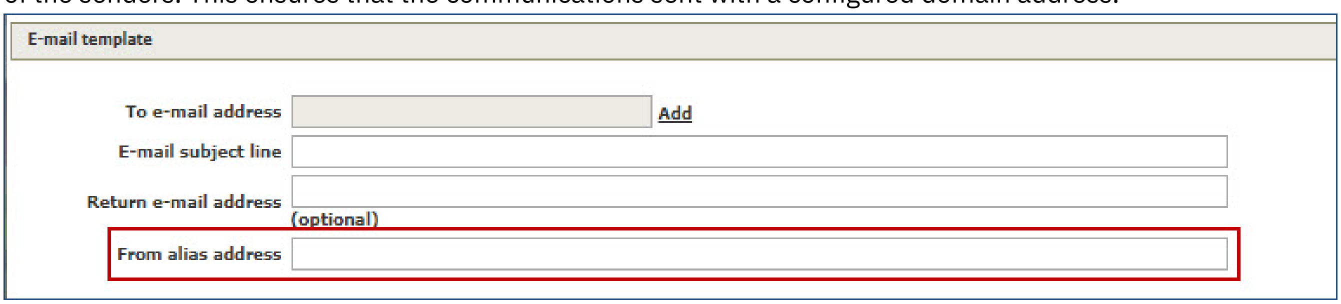
Starting this release, the panel standard column Resume PDF in the req folders is now updated to **Resume/CV PDF**. This update is to avoid ambiguity and ensure improved user experience.



RTC internal reference # 127779.

Communication Templates - From Alias Field

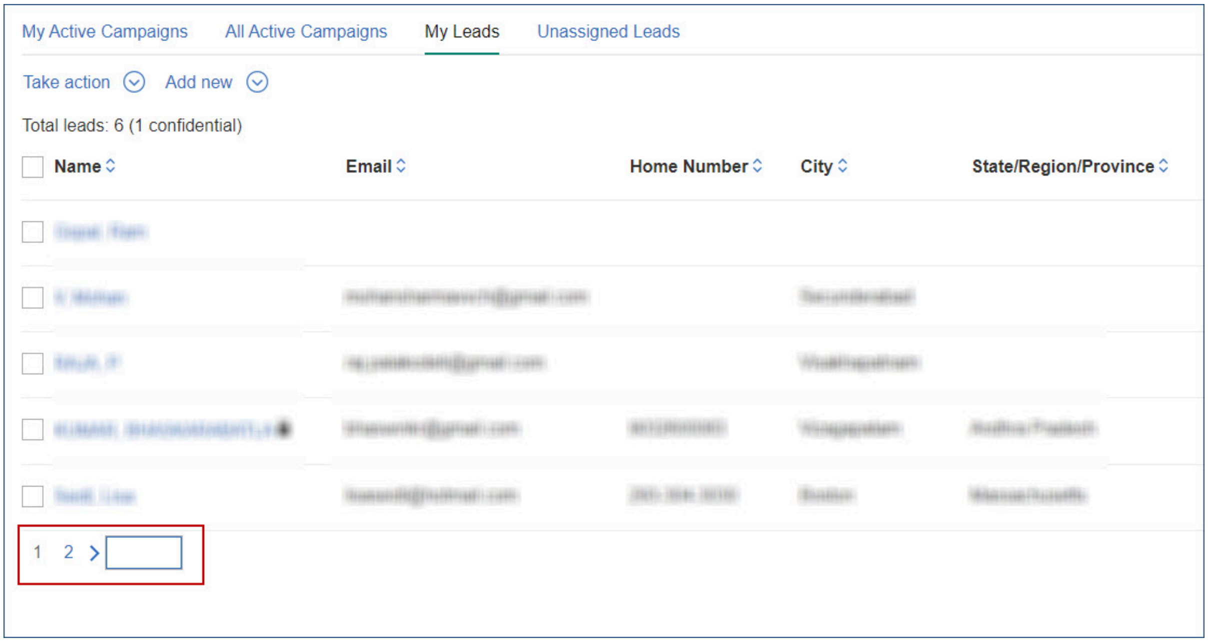
When communications are sent via BrassRing, for some clients, the domain name is removed. This results in ambiguity and confusion. To remedy this situation, a new From Alias field is added in the communication template add/edit page to store the domain name which replaces the email address of the senders. This ensures that the communications sent with a configured domain address.



RTC internal reference # 128035.

Lead Manager - Text Box in Pagination

Pagination in Lead manager screens has an enhancement. A text box is added in pagination so that users can easily go to a specific page by entering the required page number.



RTC internal reference # 127462.

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.

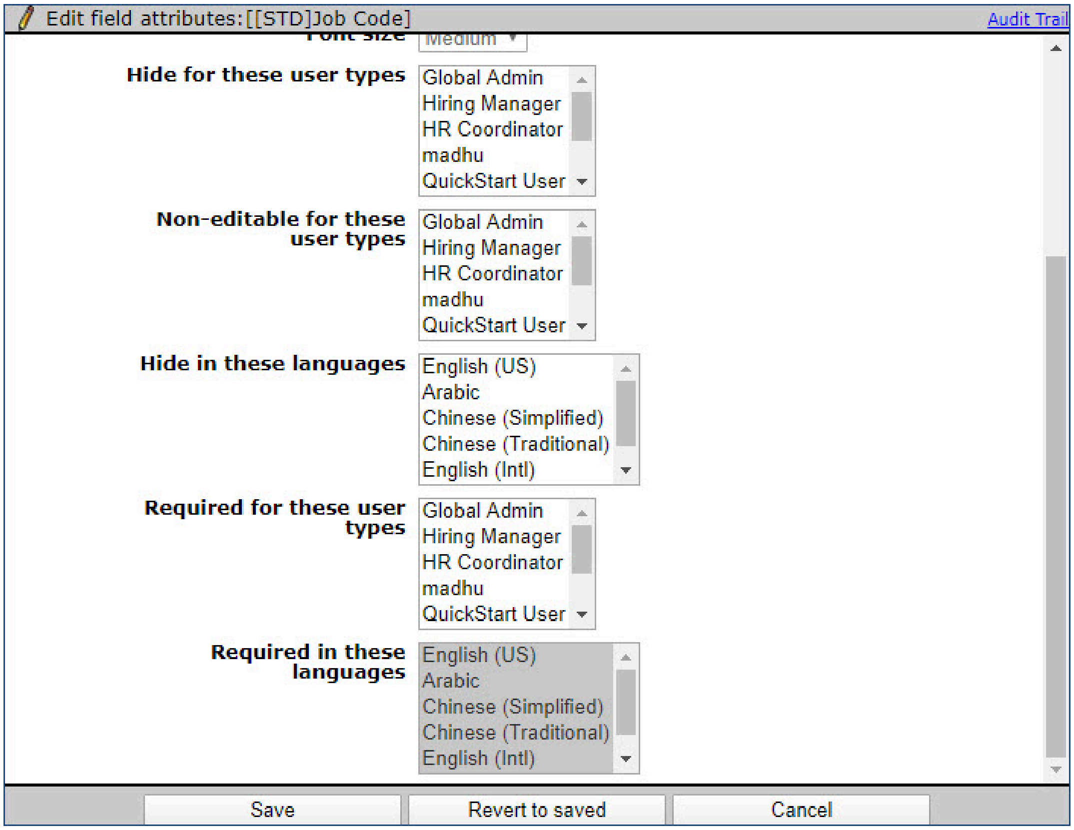
Reqs - Save As New - Field Configuration

When a req is created using the Save as New option from an existing req, the new req receives the field responses from the existing req. Starting this release, a new setting is added in the Edit field attributes page to control the user types that can view the field responses from the existing req.

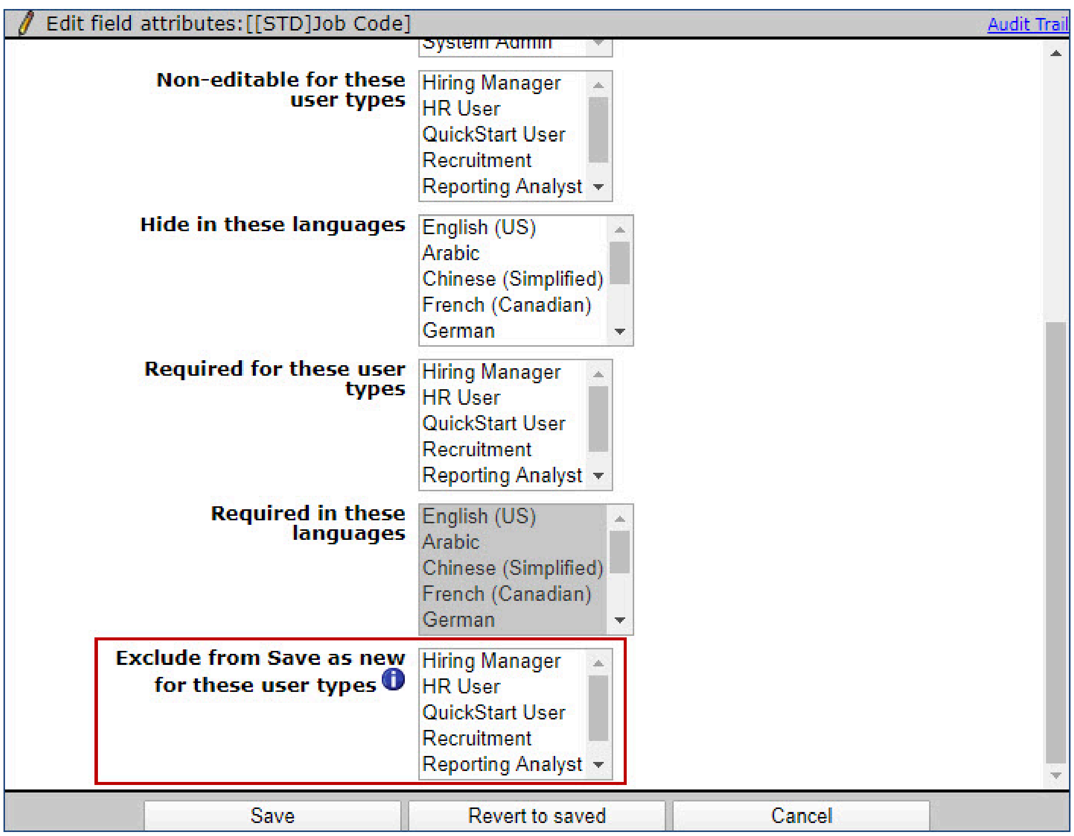
Exclude from Save as new for these user types is the new setting. Workbench administrators can select the user types that would not have access to the field responses.

Workbench Path: **Tools** > **Forms** > **Reqs** > **Req forms** > **Administer Req fields** > **Edit field attributes**

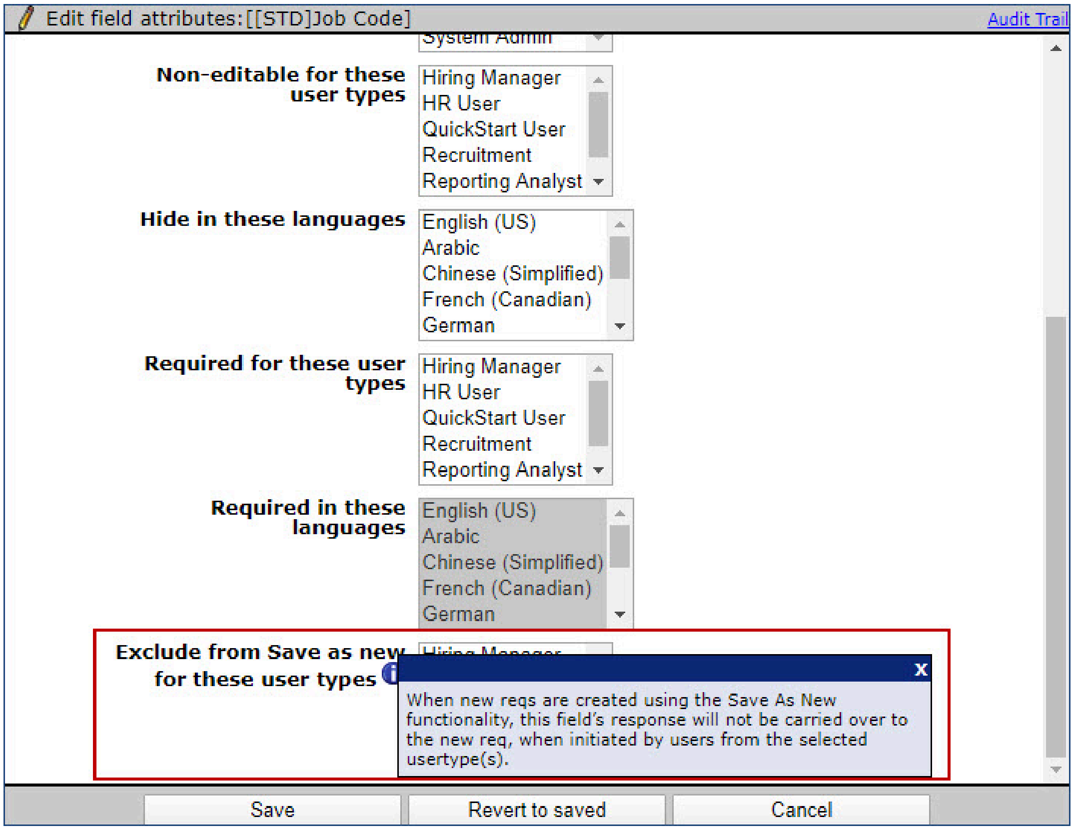
Before this release:



After this release:



Tool Tip: This provides explanation about this setting.



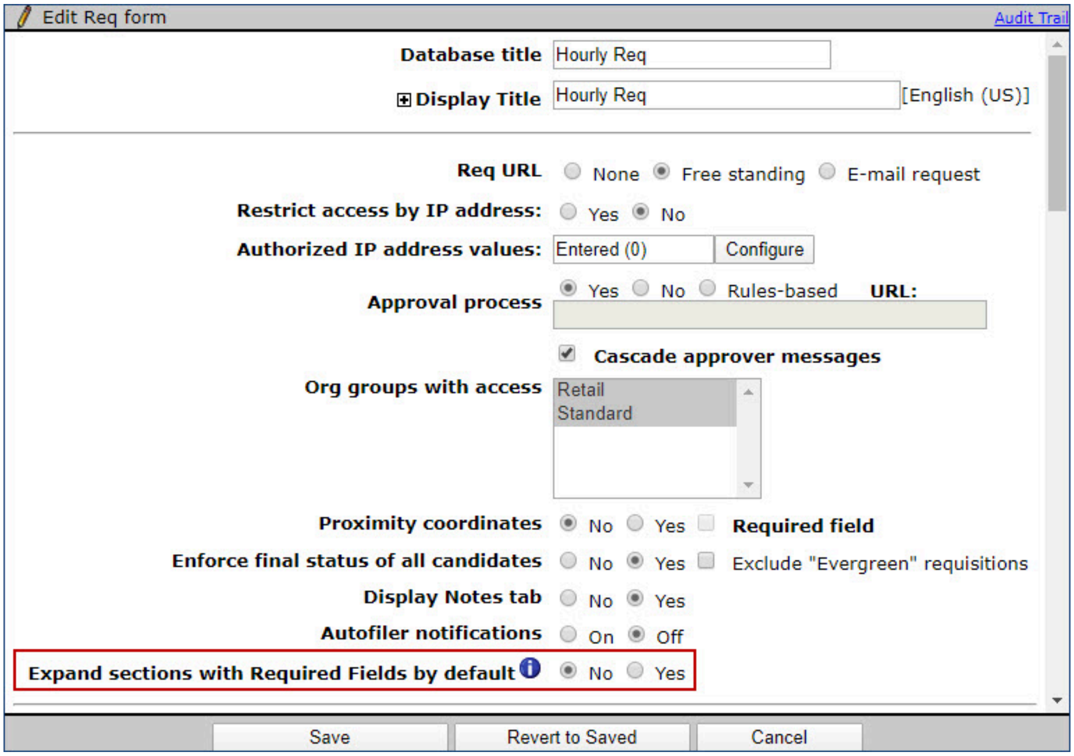
RTC internal reference # 126469.

Reqs - Expand Sections with Mandatory Fields

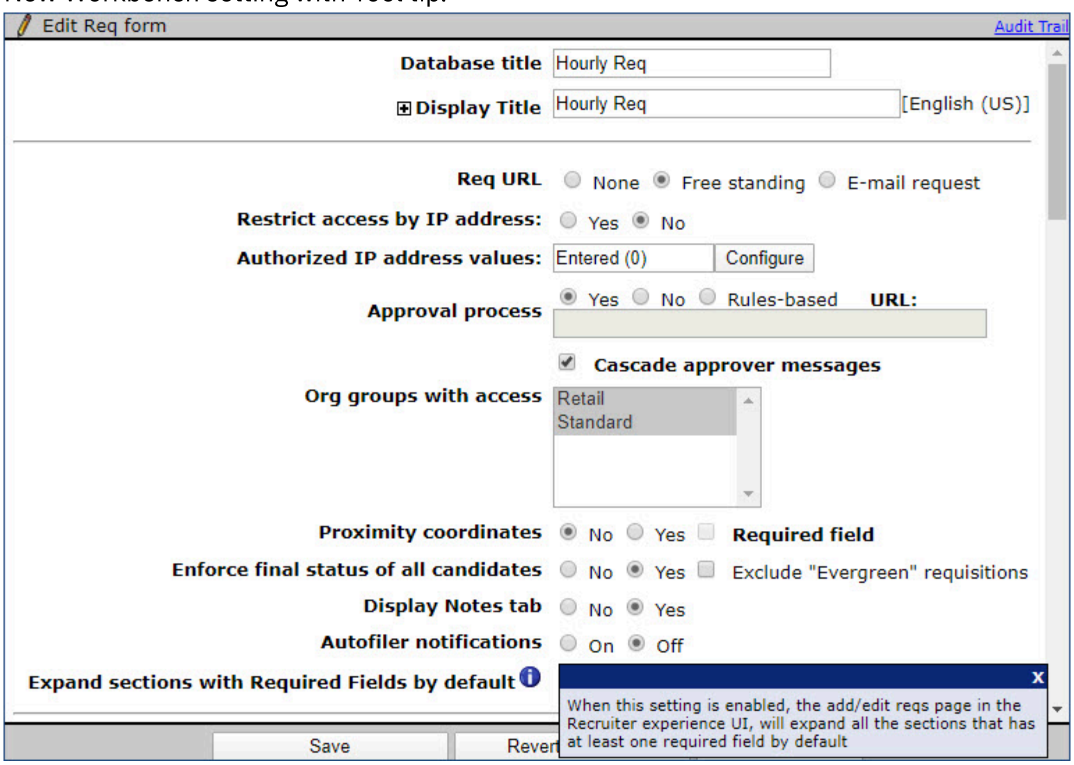
Previously, while adding or editing a req, except for the first section, all the sections were closed by default. Users skipped the closed sections and tried to save the req only find that there are more fields and sections to be completed.

To improve user experience, starting this release, a new setting is added in the Edit Req form page of Workbench. **Expand sections with Required Fields by default** is the new setting with Yes and No options as radio buttons. By default, this setting is set to No. When it is set to Yes, all the sections that have at least one mandatory field are open.

New Workbench setting



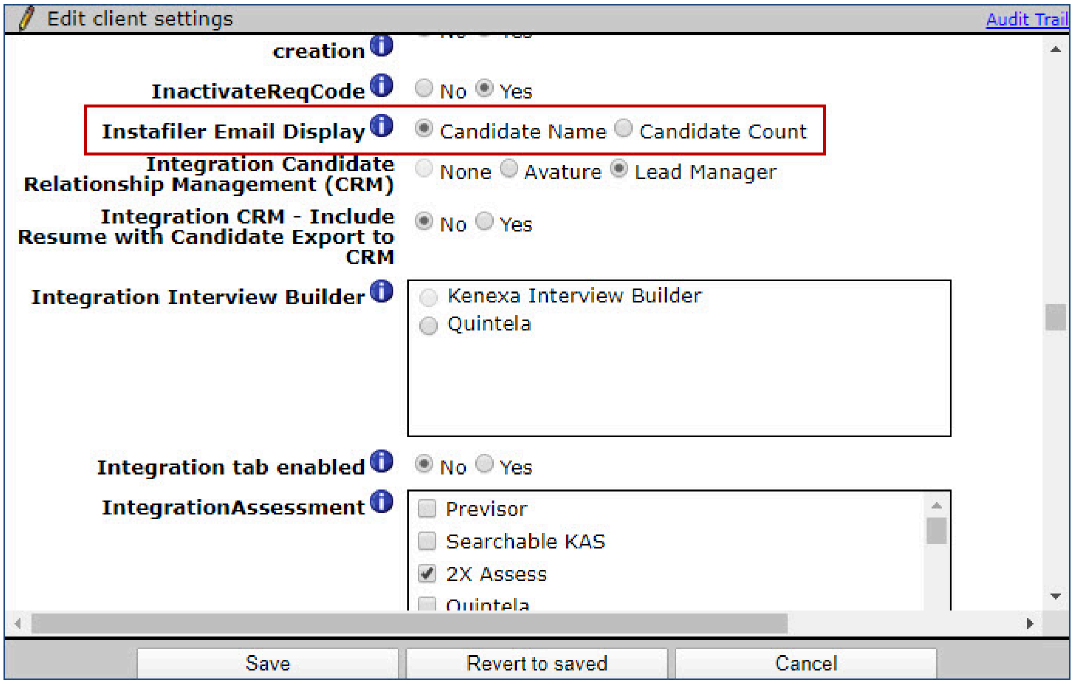
New Workbench setting with Tool tip.



RTC internal reference # 126471, 127602.

Insta Filer - New Client setting

A new client setting **Instafiler Email Display** is added in Workbench with the options **Candidate Name** and **Candidate Count**. If candidate name is selected, the name of the candidate is displayed in the email notification sent by Insta filer. If the candidate count is selected, then the number of candidates that are being added is sent in the email.



RTC internal reference # 127604, 127887.

Smart Approval - Honoring User Type privileges

Previously, the View/Hide questions feature did not honor user type privileges. Starting this release, the feature can be configured to honor specific user type privileges. Based on this configuration questions can be displayed or hidden from specific user types.

RTC internal reference # 127223.

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.

Export Users - New Column

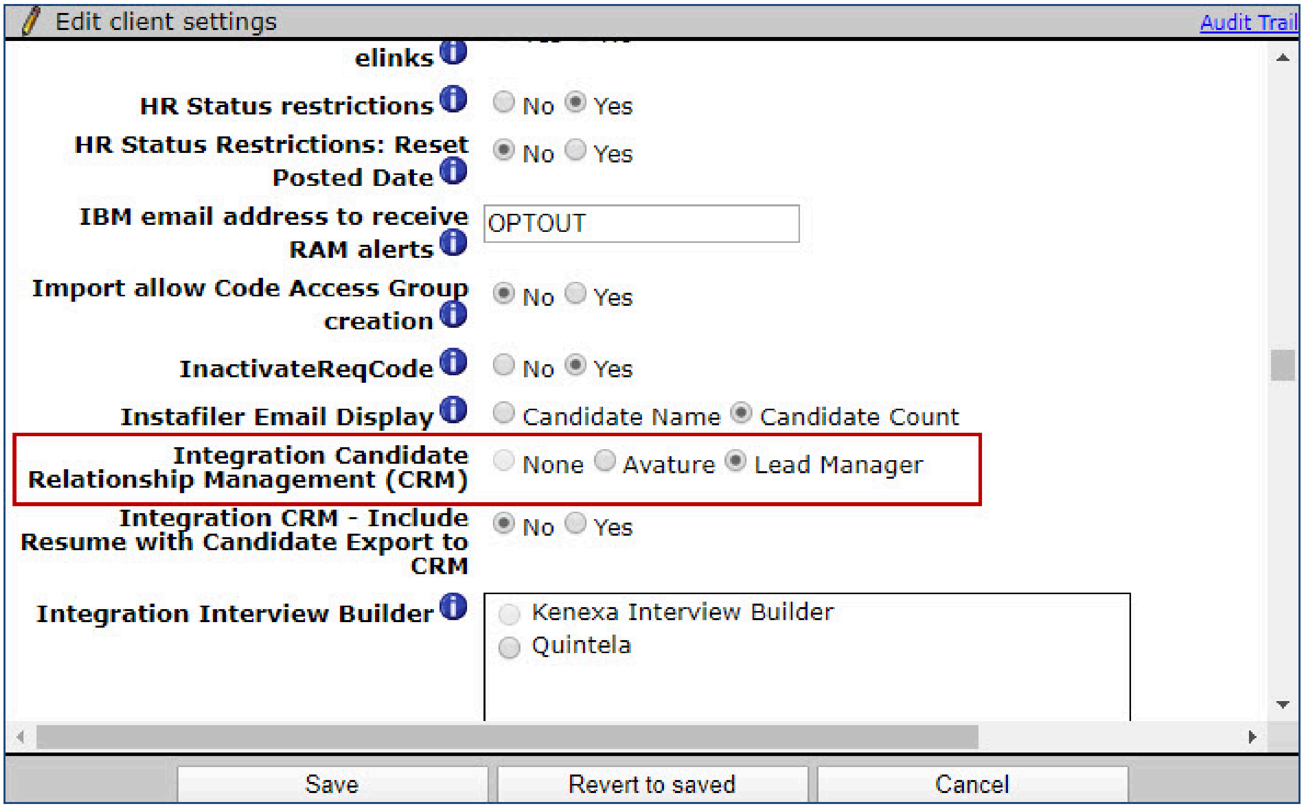
When BrassRing users list is exported from Workbench, there could be users that does not have access to BrassRing system. However, their names are presented in the report. To differentiate between the system users and non-system users, a new column is added in the user export report. **Last Access Date** is the new column that provides the date on which the user accessed the system last. System users can be differentiated in the report using this information.

RTC internal reference # 127636, 127891.

Candidate Relationship Manager Vendor Integration

The Client setting **Integration Candidate Relationship Management (CRM)** is updated to have relevant options. The options after this release are

- None
- Avature
- Lead Manager



RTC internal reference # 77268.

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 **March 2020 release of Onboard**:

- Staging - March 5, 2020
- US Production - March 14, 2020

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.

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.

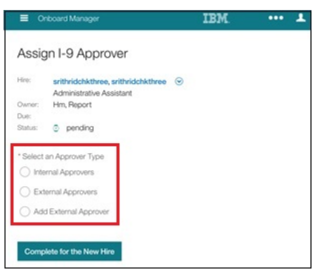
USE IN ONBOARD NEW HIRE

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.

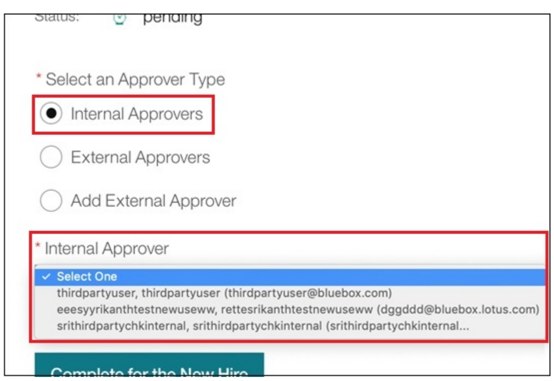
USE IN ONBOARD MANAGER

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.

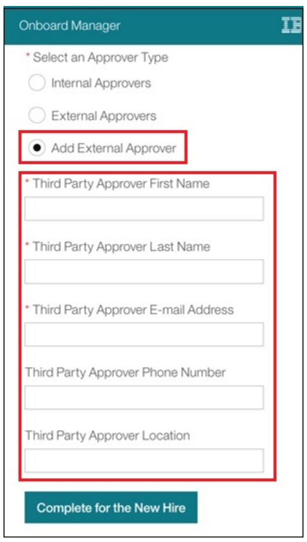


Select an Approver Type: Internal Approvers:

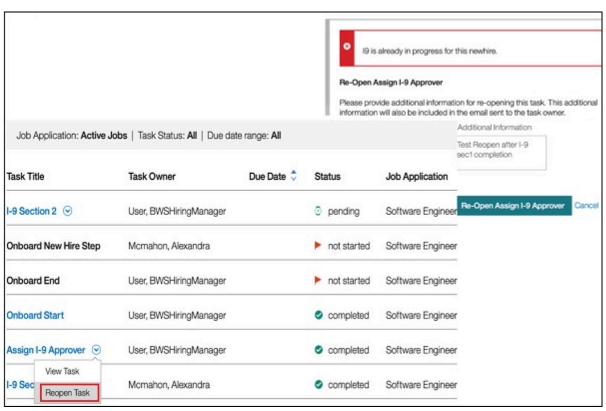


Select an Approver Type: External Approvers: Note: When an onboarding manager selects an External Approver, that person receives an email with a link to access and complete Form I-9. The approver can copy the URL into their browser and complete the form. If approvers have not used Onboard, they receive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

Add External Approver:



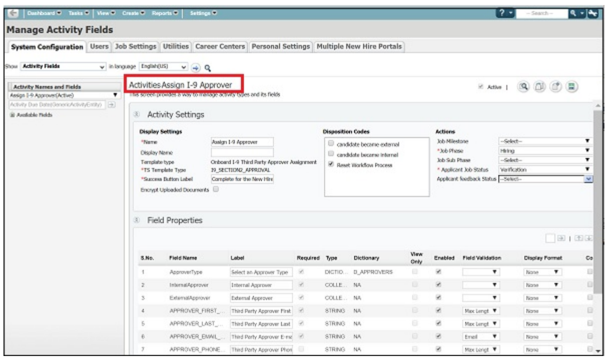
Reopen Assign I-9 Approver:



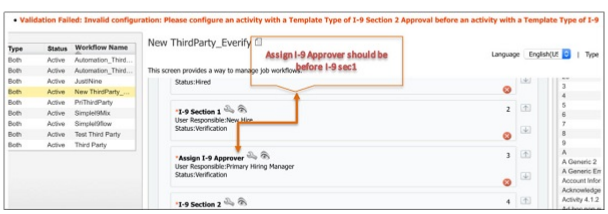
PROCESS AND CONFIGURATION

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:

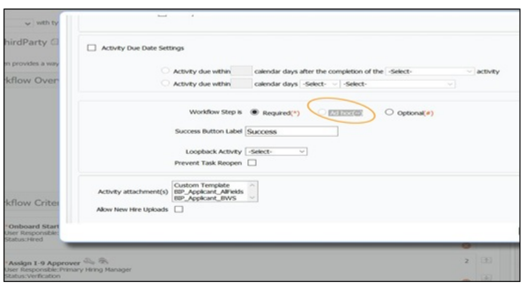
```
<JobApplicationEntity>
<thirdPartyApproverName>
<xsl:value-of select="$Onboard/*:Candidate/*:UserArea/
*:Id[@idOwner='ThirdPartyApproverName']/*:IdValue" />
</thirdPartyApproverName>
```

   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.

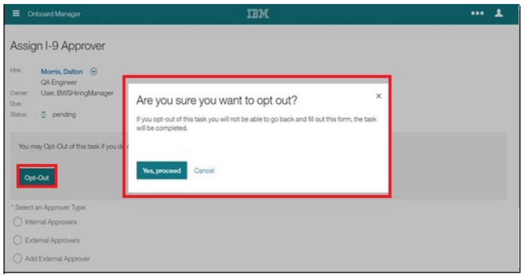
Third-Party Approval - Other Enhancements
There are enhancements to Third-Party Approval.

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

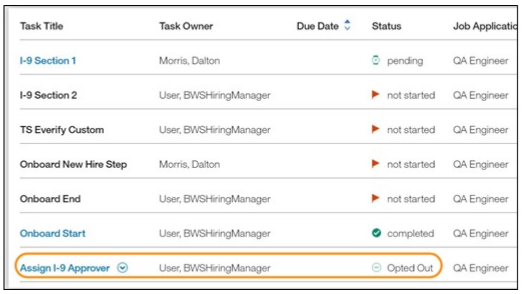


  - The **Allow Third Party Approver** option is disabled if the Assign I-9 Approver is added into the workflow.
  - The **reopen of Assign I-9 Approver** task is not allowed if I-9 Section 2 is completed with receipts.

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

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

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:

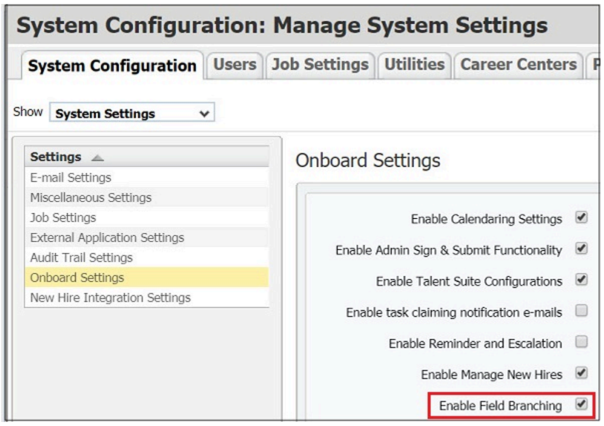
- When the approval activity is reopened, the link for active/in-progress I-9 Section 2 activity in the **My Task**s page is disabled. Once the approval activity is completed, the link is again enabled.
- When the user tries to complete I-9 Section 2, the system checks the **status** of the approval 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.

Third-Party Approval - Email Markers Extended to Custom Emails

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

These changes are specific to correspondences configured in Onboard.

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

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

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

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

Third-Party Approval - Change to External/Internal Lists
For third-party approval, IBMers were removed from the External list and were properly listed in the Internal list.

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.

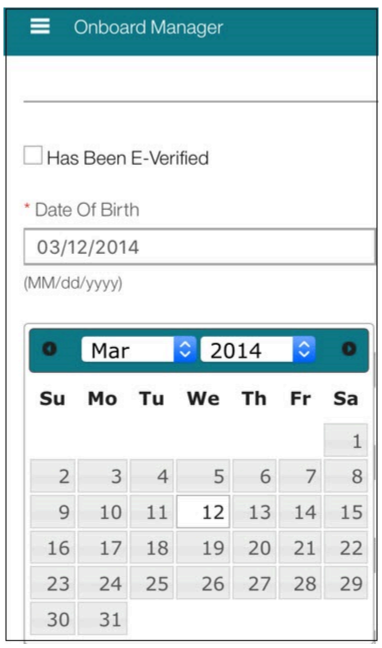
New Date Picker
For March, there is a new **date picker**, that when selected, displays a calendar that allows the easy selection of a date.

The date picker is available only in the Personal Information screen and Create New Hire screen.

Users also have the option to manually enter a value.

Note: The date picker is available only for the English(US) locale. Other locales will still need to provide the date manually.

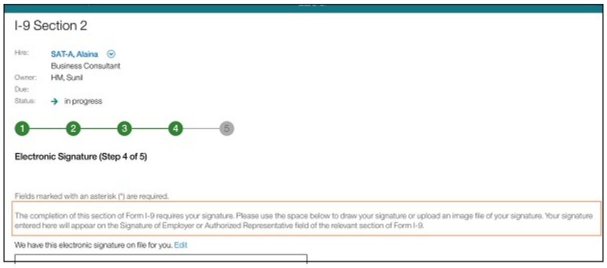
Date Picker:



I-9 Verbiage Changes - eSignature Step
There are verbiage changes for **I-9 Section 2** for the **eSignature** step.

For the electronic signature in Section 2 (Step 4), previously the text was: *The completion of this task requires your signature. Please use the space below to draw your signature or upload an image file of your signature. The signature provided on this step will be applied to the generated PDF document*.

Now, the text is: *The completion of this section of Form I-9 requires your signature. Please use the space below to draw your signature or upload an image file of your signature. Your signature entered here will appear on the Signature of Employer or Authorized Representative field of the relevant section of Form I-9*.



Manage New Hires: Async Implementation for Bulk Actions
A threshold value exists for each bulk action, beyond which the process turns into **async**. Each record is processed in a separate async thread, but the actual transaction is still a synchronous call.

If the number of records selected are less than this threshold, then the response is seen in the interface.

The thresholds for each action are as follows:

- Bulk discontinue and Bulk revert discontinue > 10 records.
- Bulk task completion > 2 records.
- Bulk correspondence - no threshold (always synchronous).

If the process turns into async, then the following message displays: *The bulk action is in progress. You will receive an email with status once the process has been completed*. Users can proceed with further actions after seeing this message.

A threshold value exists for each bulk action, beyond which the process turns into async. Note: The current threshold for each bulk action to turn into async remains same.

An email is sent to the initiated user with the report after the async process completes.

Note: Only activities whose Talent Suite template type is No Template or Onboard Start or Onboard End are allowed in bulk. Tasks must be configured to be taken in bulk. If no tasks are configured, the following message displays: No Tasks Are Configured for Bulk Completion. Activities should not have any fields configured as required for them to be considered for Bulk Completion.

Updates to State and Federal Forms
There are updates to maintained forms.

Form Updates

Arkansas AR4EC

Arkansas AR4ECSP

California DE4. Note: Form is updated with 02/20 version and is available now in Stage. This updated form only will be sent to Production instead of 12/19 version.

Kansas K-4

Kansas K-4C

Maryland MW507

North Carolina NC-4

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 release, the following defects were addressed.

RTC Jazz Number	Defect Description
225544	TS002718432 - Dispositioned new hire still showing as In Progress in report and on Job Application.
227435	ESCALATED - TS002841631 - I-9 Section 1 completion issues. Task loops back and shows as In Progress after clicking Submit (TS002953828, TS003301447, TS003327192).
229989	TS003030859 - Error when bulk discontinuing in Manage New Hires.
230200	ESCALATED - TS003039164 - Onboard Start did not autocomplete.
231428	TS003144961 - Users are unable to load the E-Verify task. Page is reloading.
231693	TS003165461 - Unable to save new custom dictionary value in Production.
232271	TS003211061 - Unable to generate standalone Section 1 (Skills case TS003235452).
232272	TS003217355 - Unable to complete Section 3 (TS003244567).
232678	TS003258006 - New hire's discrepancy on E-Verify task versus Manage New Hire
233172	TS003315734 - Getting error in Onboard I-9 third party approver assignment.
233173	TS003315825 - External Approver is blank and still recruiter is able to submit/trigger tasks.
233188	TS003312261 - Unable to complete I-9 Section 3.
233873	TS003391032 - Unable to bulk complete tasks. Note: Only activities whose Talent Suite template type is No Template or Onboard Start or Onboard End are allowed in bulk. Tasks must be configured to be taken in bulk. If no tasks are configured, the following message displays: No Tasks Are Configured for Bulk Completion. Activities should not have any fields configured as required for them to be considered for Bulk Completion.
234019	Unable to access I-9 Sĕction 2 task for new third-party approver when hiring manager tries to reopen I-9 Section 2 from E-Verify task.
234463	TS003456153 - CA DE4 Form Revision in production.

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