IBM: BrassRing and Onboard

BrassRing and Onboard Release Notes May 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, May 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**.

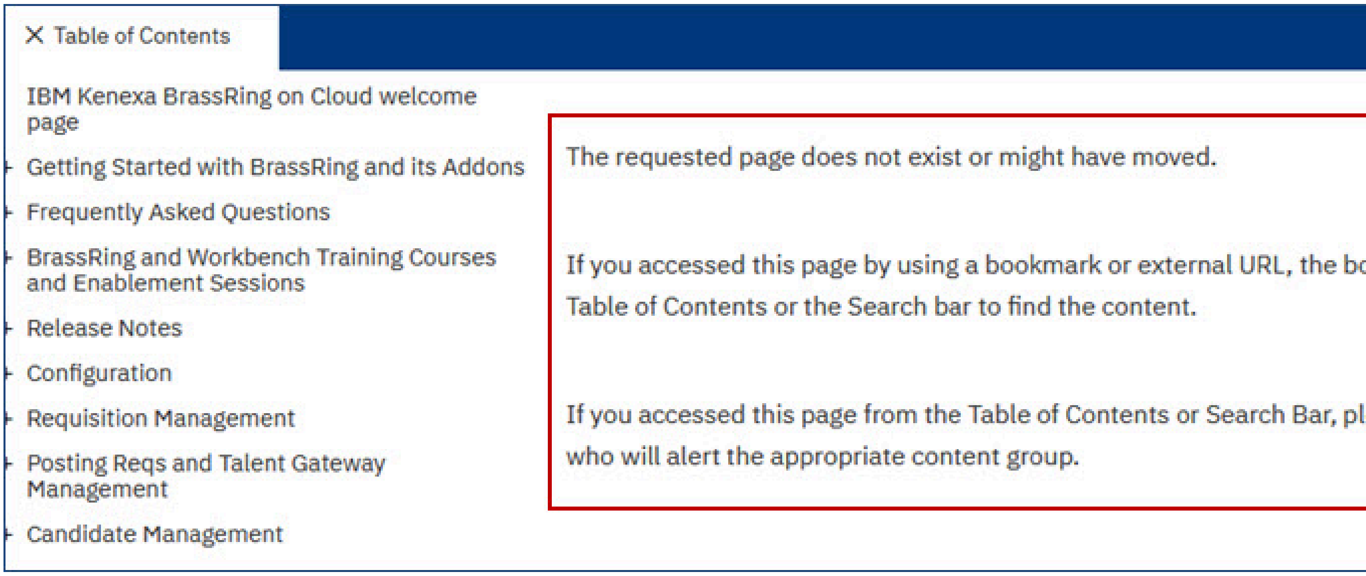
Refer to the BrassRing Welcome page on the IBM Knowledge Center for a **Pre-Release** version of the BrassRing Release Notes.

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 1 June, 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. IBM does not test for, nor guarantee accessibility and that no RFEs nor feature development is be considered; even though legacy configurations of these types might 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, it is required that you upgrade any Classic Full or Global Talent Gateways to use the responsive candidate experience. It is also required that you complete HR Status Category mapping (which is required for candidates to access the Application Details page; including posted Offers, Documents, and Forms [that is, responsive candidate portal).

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

IBM hosted multiple sessions on Upgrading to the Responsive Talent Gateways. Check out the recordings on the Training and Enablement site. You can also contact your IBM Kenexa Representative with any questions or concerns.

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**.

- A **View Form PDF** column is added to the Forms grid with links to the PDF Forms.

Dark Launch Features

Dark Launch features are those features that are released to Staging environment - Only and are NOT released to Production environment for a considerable amount of time. This process gives an opportunity and enough time to test these features thoroughly before they are available in the production environment. Clients are requested to configure and test these features and provide their feedback and inputs via the discussion forums for which links are provided in respective feature articles.

There are no dark launch features during this release.

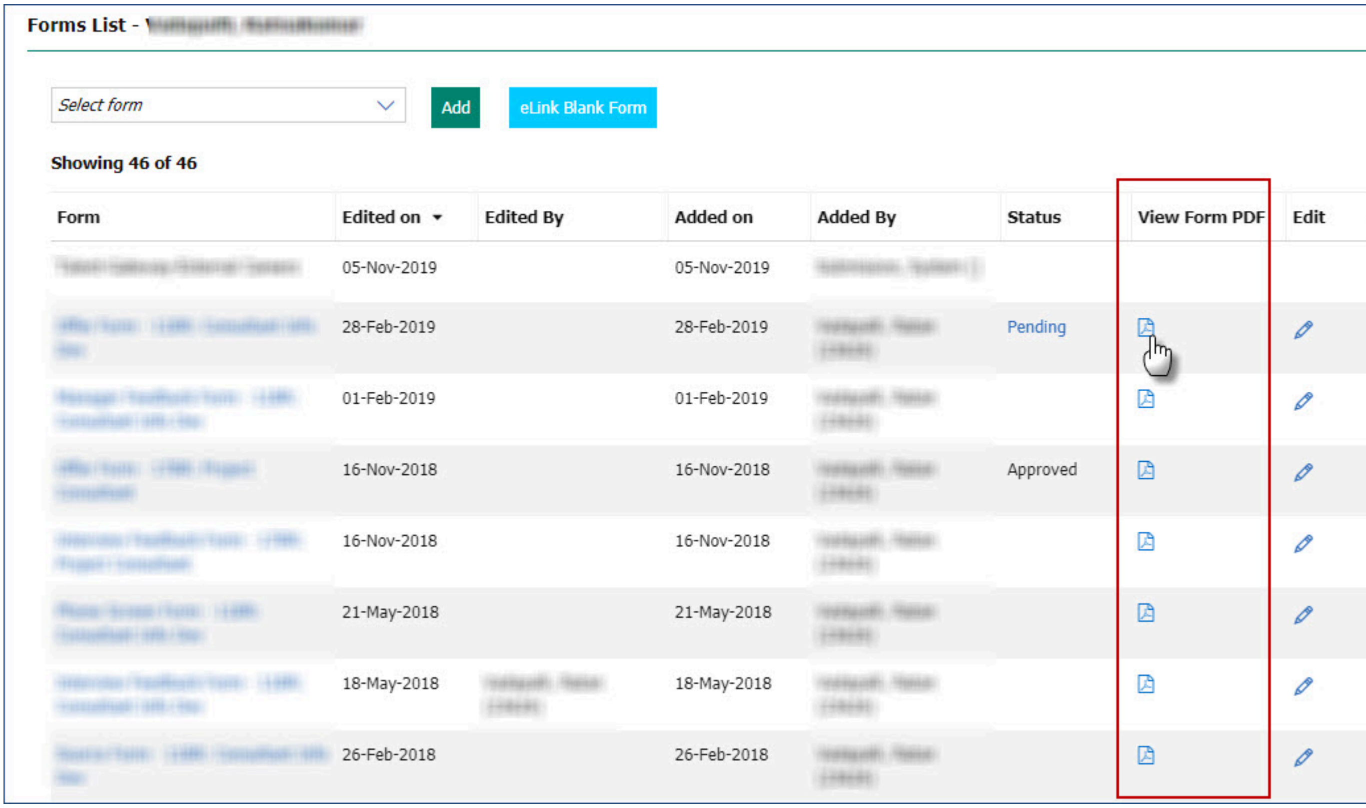
Visible Changes

The current release of includes the following visible changes for and .

Forms - View Form PDF

Starting this release, the Forms list grid displays a new column View Form PDF. This column displays a PDF icon. When users select this icon, the form is displayed in PDF format. This existing View Form

PDF button that is displayed in the View Form screen remains as it is. The new column is available only to the users with appropriate user type privileges.

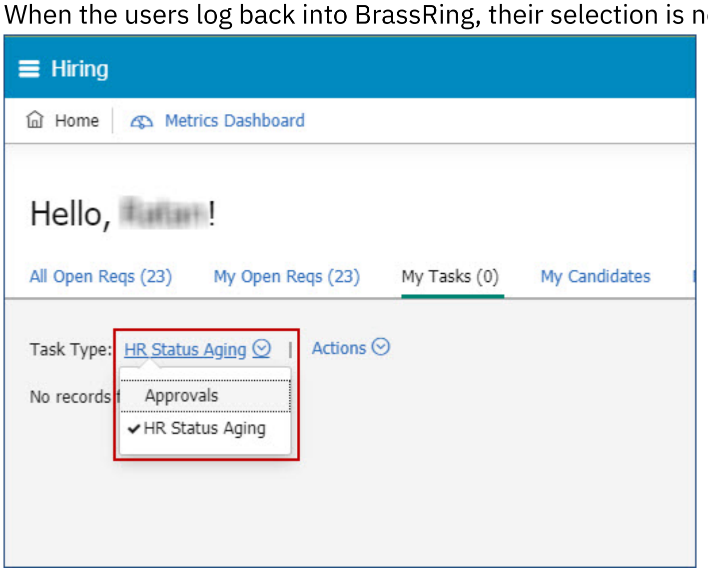


RTC internal reference # 128499.

BrassRing Home Page - Tasks Tab - Task Type Retention

Previously, the selection of the Task Type **HR Status Aging** in the Tasks tab, is reverted to Approvals each time the user logged out of BrassRing. This reversion is an inconvenience for the BrassRing users that do not have Approval privileges as they must select the HR Status Aging every time they log in.

Starting this release, when users select HR Status Aging as the Task type, the selection is retained. When the users log back into BrassRing, their selection is not reverted to Approvals.



RTC internal reference # 128386.

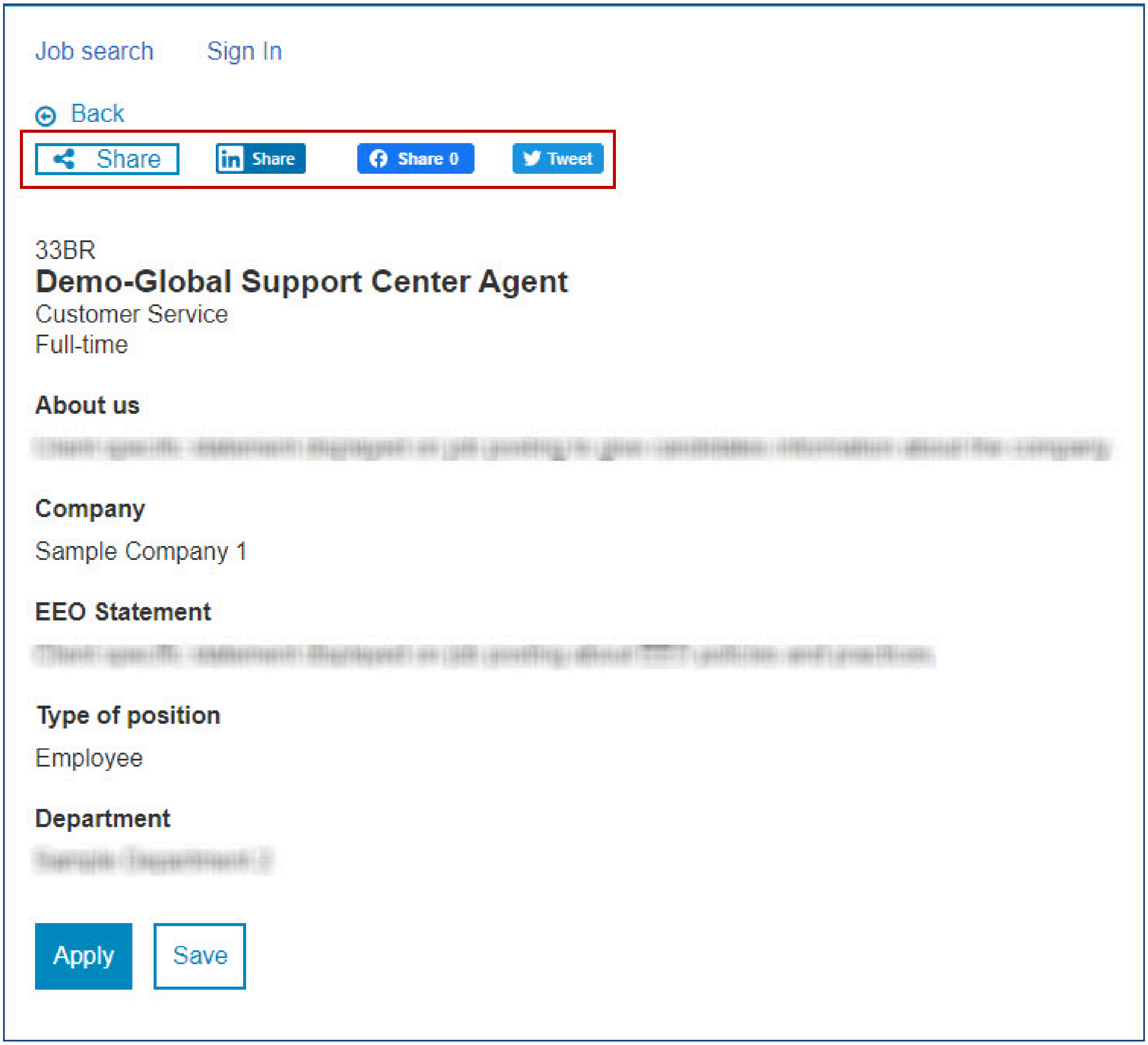
Communications - New Blurb Condition

Starting this release, BrassRing users have a new condition option when they create or edit blurbs. The existing conditional blurbs have "equal to" (=) as a condition. Starting this release, in addition to equals to, a new condition **Not equal to (<>) or Not** is available to select. By default, "equal to" (=) is selected and users can change it using the drop-down option to "Not equal to".

RTC internal reference # 128046.

Talent Gateway - Social Media Share

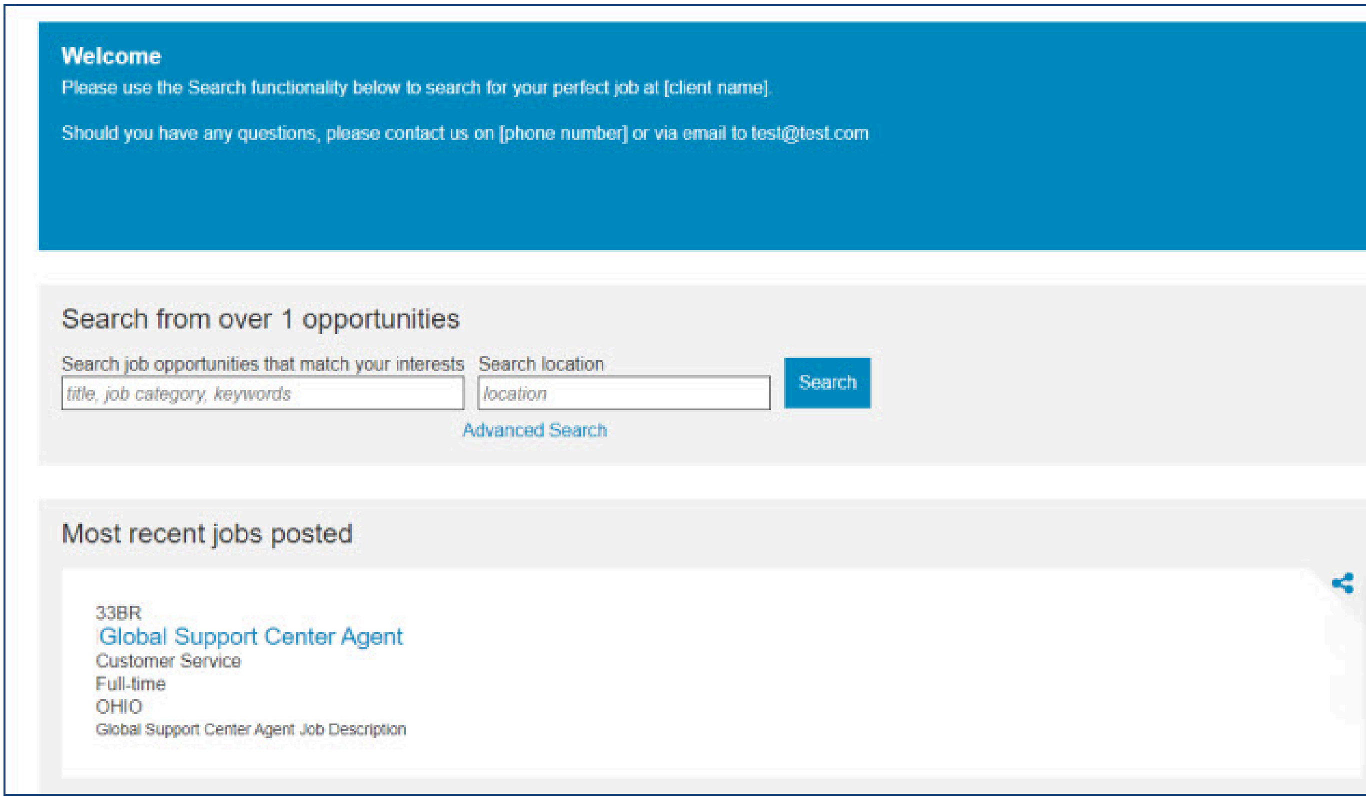
It was observed that the new Social Media share button that is added in the Job description pages of responsive Talent Gateways is not consistent. It is inconsistent in size with the share buttons of Face book, LinkedIn, and Twitter. To provide better candidate experience, the size of this button is optimized to ensure consistency with the other social media share buttons.



RTC internal reference # 129242.

Talent Gateways - Sign In Bar Width Enhancement

As a part of the continuous improvement of the responsive Talent Gateways, the Sign-in bar on the home screen of the Talent Gateways is expanded. This change is to make it consistent with the search result bar width that was enhanced in the previous release and also to ensure better candidate usability experience.



RTC internal reference # 128851.

Talent Gateways - Send To Friend Accessibility Enhancements

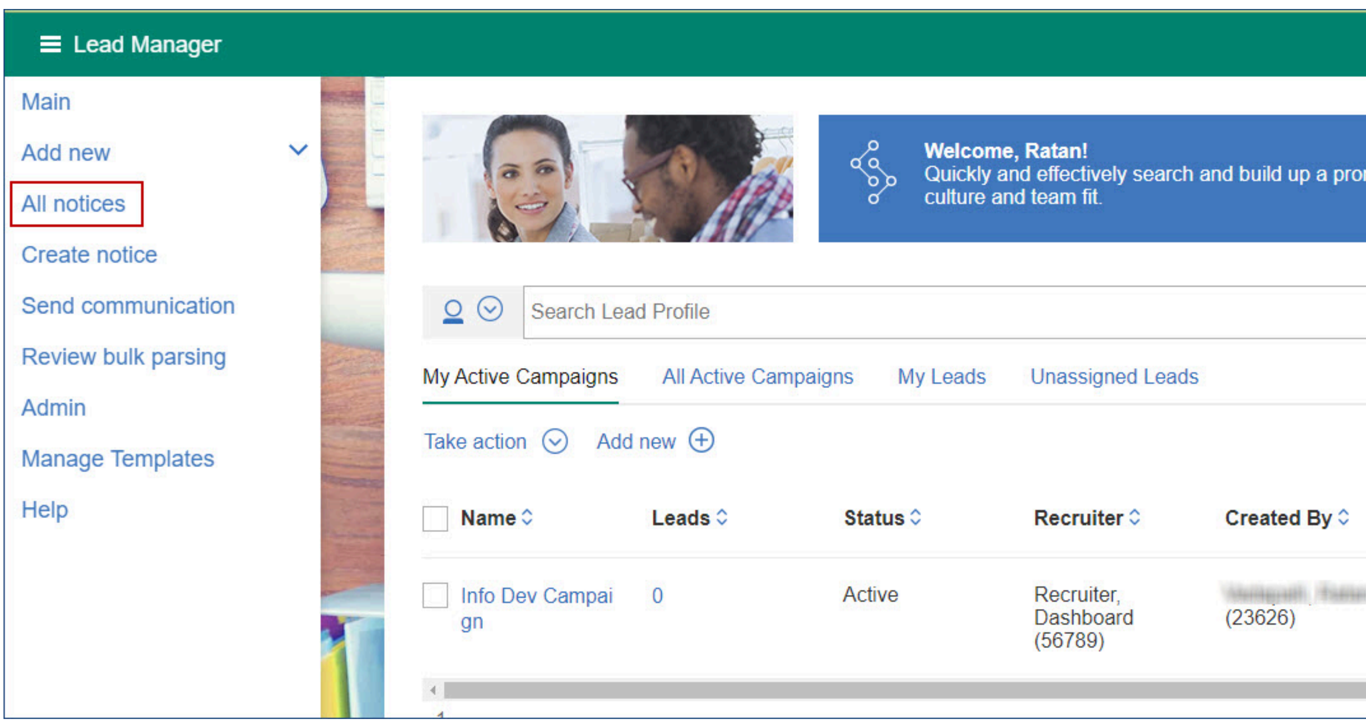
The Send to Friend stand-alone module has the following accessibility-related enhancements with this release:

- The **Skip to first action element of main content** link takes the candidates to either the "To email" input field or the first error link if there is an error on the page.
- The field label that used to be To is updated to **To email**. This update is to avoid ambiguity and meet accessibility guidelines. This change is for both stand-alone and regular send to friend function.
- All the error links are updated to ensure that their selection takes the user to the input field that they correspond to.
- The Skip to first action element of main content link is hidden when the success message is displayed.

RTC internal reference # 128940.

Lead Manager - Home Page Enhancement

Starting this release, all the notices that were previously displayed on the Lead Manager home page are moved to a new menu item **All Notices** under the hamburger menu. The grids in the home page are moved to the beginning of the home page to provide more working space to the Lead Manager users.



RTC internal reference # 128807.

Lead Manager - Search Using Filters

Lead Search

Starting this release, the Lead Manager Lead search is enhanced to provide multiple fields as filters. Users can select both standard and custom fields as filters. There is no restriction to the number of filters can be added or the type of fields.

The filters that are used for search are displayed in the result grid and removing the filters would alter the result grid.

RTC internal reference #129075.

Campaign Search

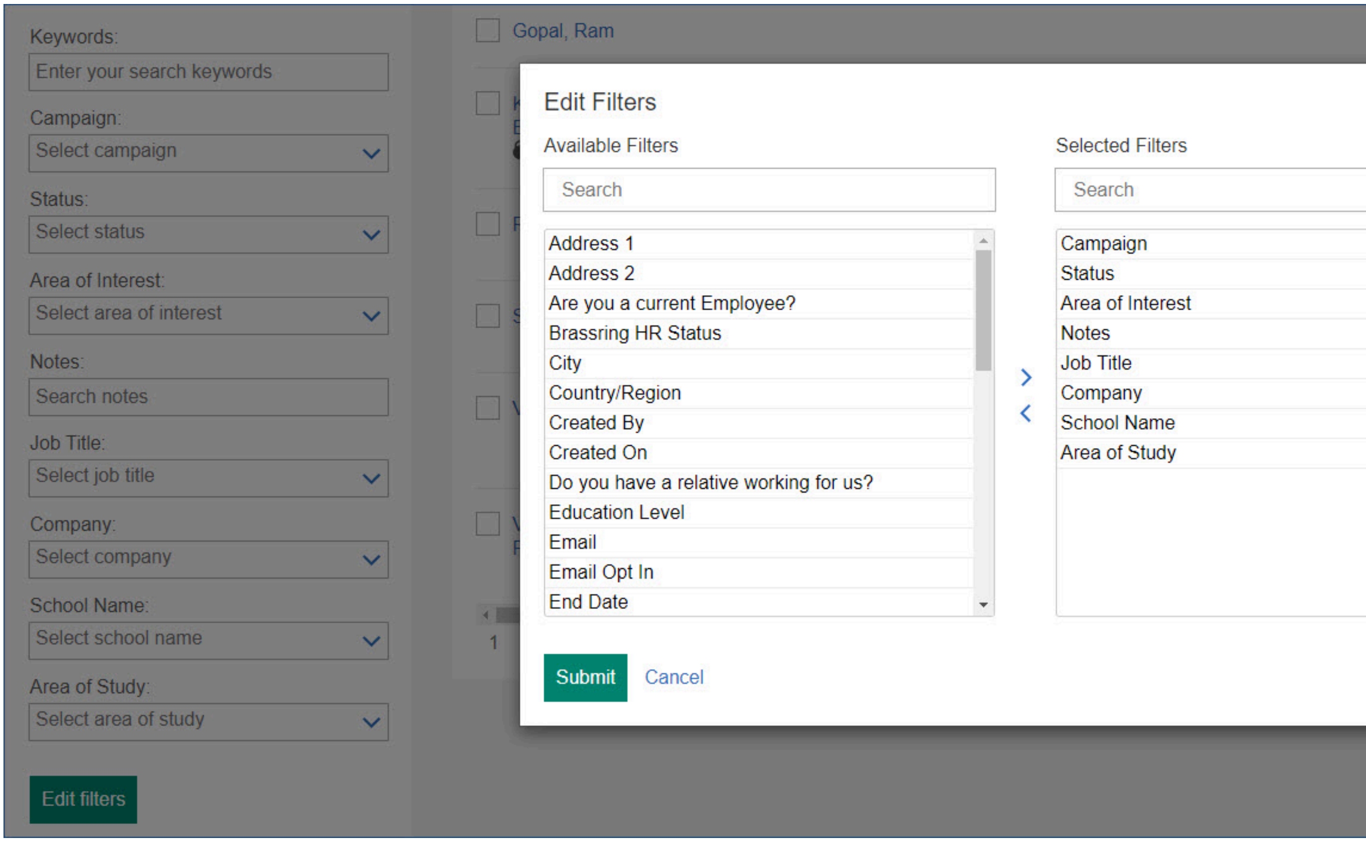
Starting this release, the Lead Manager Campaign search is enhanced. To perform better search, users can add filters to the Campaign search. The following fields are the default filter fields:

- Campaign Status
- Created By
- Job Title

In addition to the default fields, users can add multiple campaign fields as filters. Users can select both standard and custom fields as filters. There is no restriction to the number of filters a user can add or the type of fields.

The filters that are used for search are displayed in the result grid and removing the filters would alter the result grid.

RTC internal reference # 128938.



Lead Manager - Metric Dashboard Link

Starting this release, a link to the Metrics Dashboard is added to the Lead Manager hamburger menu. It is also added to the Lead Manager Dashboard. This link is displayed only to the users with appropriate user type privileges.

RTC internal reference # 129028.

Configurable Changes

The current release of includes the following configurable features for and . Configurable features must be configured or turned on to be visible and available to users.

There are no configurable changes in the current release.

BrassRing Workbench

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

Talent Gateway Details - Text Customization Settings Update

This change is a part of BrassRing's move towards Responsive Talent Gateways. There are some Text Customization settings in the Talent Gateway Details screen when users add a Talent Gateway (Full) or editing an existing Talent Gateway (Full). Some of these settings are useful only to customize text on the Classic Talent Gateways and some for both classic and responsive Talent Gateways.

To enhance readability of the page and improve user experience, the following Text Customization settings from the Talent Gateway Details screen are removed:

- Client header (classic-only)
- Navigation bar (classic-only)
- Client footer (classic-only)
- Confirmation message (classic-only)
- Confirmation email text (used by responsive?)
- Resume posting instructions (classic-only)
- Profile builder instructions (classic-only)
- Search agent text (classic-only)
- Send to friend text (classic-only)
- Create an account (classic-only)
- Gateway login (classic-only)
- Send to friend email text (used by responsive)
- Search agent reply email (used by responsive)
- Search Openings Text (classic-only)
- Landing Page Text (classic-only)

The settings that are used by Responsive Talent Gateways are also removed completely from this screen. This change is to ensure that the settings do not auto-populate default text in English for Talent Gateways of locales other than English.

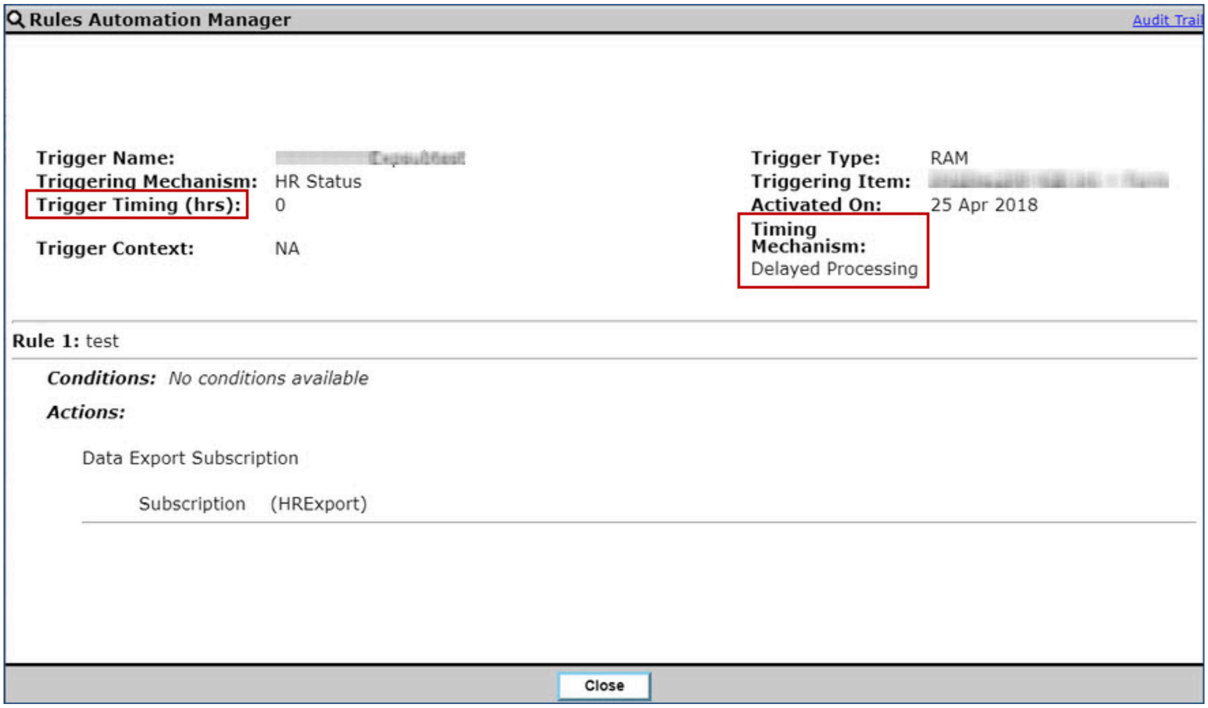
Out of Scope: Basic Talent Gateway Details, Global Talent Gateway Details, Talent Gateway Text Customization page.

RTC internal reference # 98467.

Rules Automation Manager - Update to Trigger Attribute Labels

There are multiple Rules Automation Manager triggers that are planned to be added that do not get triggered based on a delay in time but are triggered before an event occurs. Therefore, to avoid ambiguity, the following trigger attributes are renamed:

- Delay Mechanism is updated to **Timing Mechanism**.
- Trigger Delay (hrs) is updated to **Trigger Timing (hrs)**.



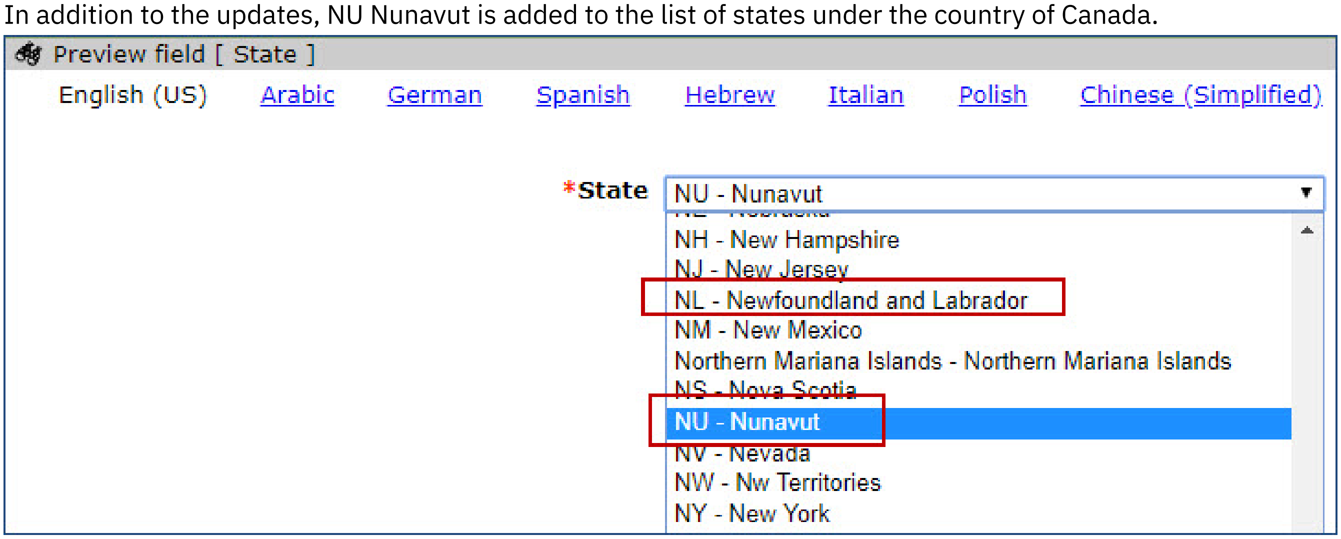
RTC internal reference # 128710.

Form Fields - State Names Updated

The lists of the Canadian state names and codes present in the backend tables are updated in this release. The table from which candidate forms and req forms derive the list of states, has the names of the following states inaccurate. The table is updated to provide an accurate list of names and codes of states:

- YU Yukon - updated to YT Yukon Territory
- NF Newfoundland - updated to NL Newfoundland and Labrador
- PE P. Edward Island - updated to PE Prince Edward Island

In addition to the updates, NU Nunavut is added to the list of states under the country of Canada.



RTC internal reference # 127790.

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 **May 2020 release of Onboard**:

- US Staging - May 7, 2020
- US Production - May 16, 2020

US Staging Data Center Relocation

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

This effort has been postponed.

I-9: Changes

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

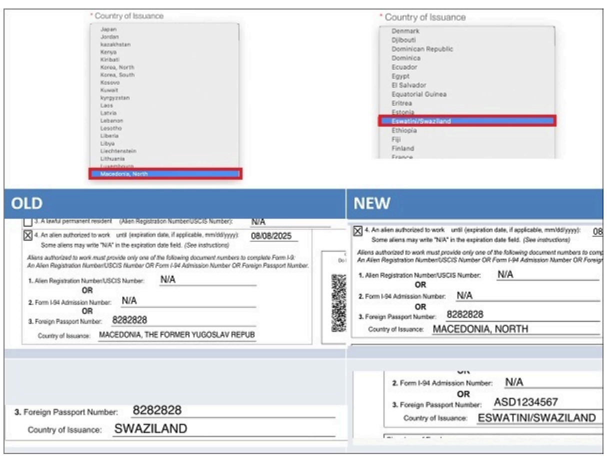
There is a FAQ on the IBM Knowledge Center that will answer the questions you may have.

Highlight of Changes

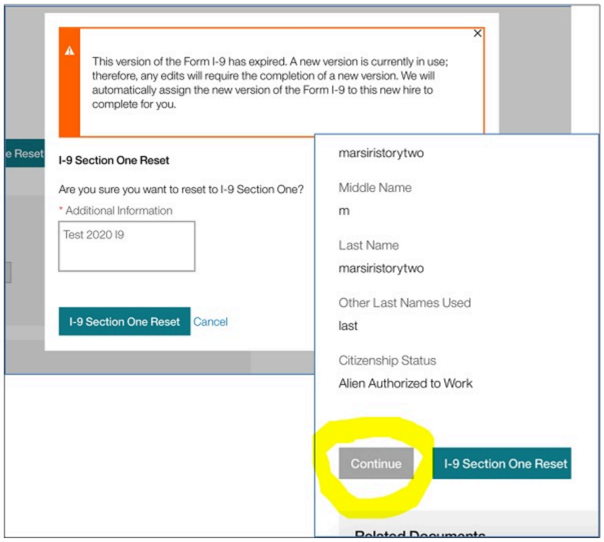
Note: E-Verify has their own way of handling I-9 changes. The following only describes use in Onboard.

Countries renamed in Country of Insurance:

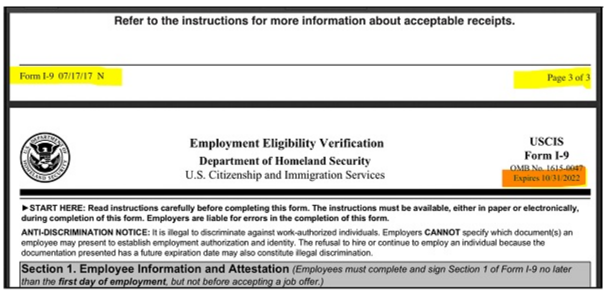
- Macedonia was renamed to Macedonia, North.
- Swaziland was renamed to Eswatini/Swaziland.



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

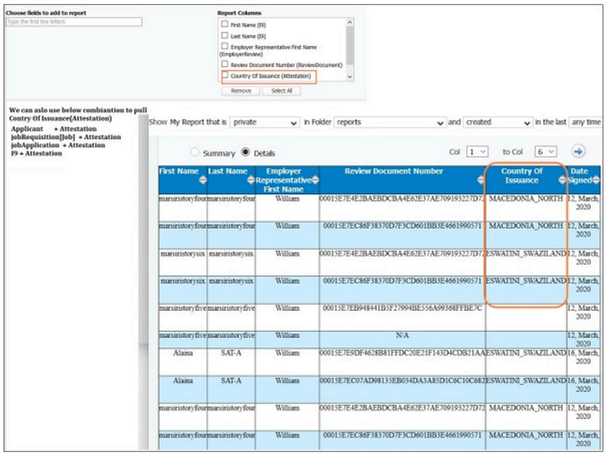


I-9 Section 3 for already completed Section 1 and Section 2 with OldForm:NewForm are appended to the old form:



V2 Export Value:

Onboard Report:



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.

Date Picker: Specific to Logged-In Locale

The **date picker**, when selected, displays a calendar that allows the easy selection of a date.

The date picker is supported for **all locale date formats** in the **Personal Information** screen.

For the **May release**, the **date picker is now specific to the logged-in locale**.

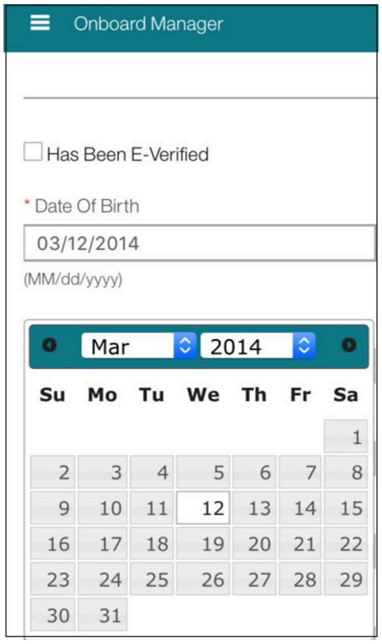
Date formats across all locales supported by Onboard are taken from the localeDefsetting file.

Note: The date picker calendar displays in English for all locales.

The following **locales are supported**:

- English (United States)
- English (United Kingdom)
- German (Germany)
- Spanish (Spain)
- French (France)
- Chinese Simplified (China)
- Chinese Traditional (Taiwan)
- Japanese (Japan)
- Korean (Korea)
- Dutch (Netherlands)
- Portuguese (Brazil)
- Portuguese (Portugal)
- Hungarian (Hungary)
- Croatian (Croatia)
- Romanian (Romania)
- Serbian (Serbia)
- Swedish (Sweden)
- Thai (Thailand)
- Turkish (Turkey)

Date Picker:



Onboard: Readiness to Support COVID-19 Challenges

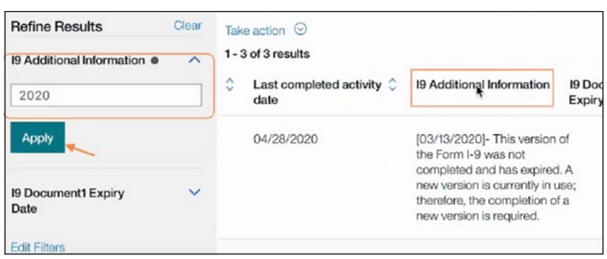
Manage New Hires: I9 Additional Information Field is Searchable/Exportable/Reportable

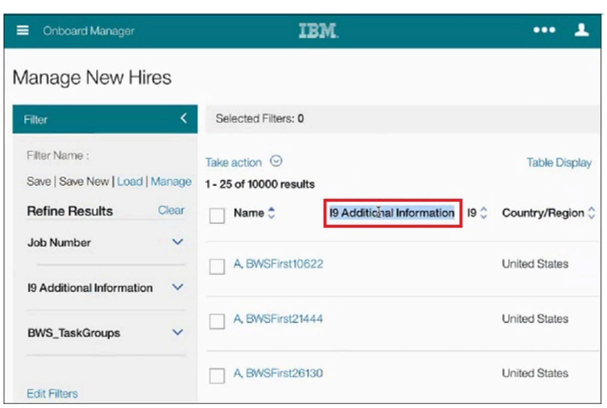
In **Onboard Manager**, on the **Manage New Hires** page, there is a field named **I9 Additional Information** that is searchable, exportable, and reportable.

This affects the Manage New Hires search and column filters.

Making the I9 Additional Information field reportable allows clients to identify impacted new hires who were authorized without a physical inspection.

I9 Additional Information field:





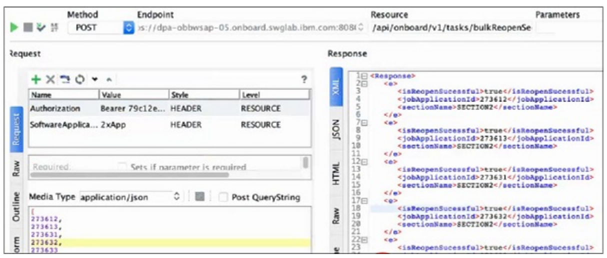
I-9: Bulk Reopen Support

A **bulk reopen** of I-9s reopens all I-9s at once to act upon impacted hires post lock-down. Allowing a bulk reopening of I-9s means that it does not need to be done individually.

This reopen is not from the Onboard Manager interface.

Notes:

- The scope is only for reopening I-9 Section 2.
- The ability to reopen forms are based on any specific criteria available within Onboard (that is, data ranges, Section 2 approvers, additional information notes, and so on).
- The reopen reason is included in the communication sent.
- The current logic for expired I-9s is followed.
- If the I-9 is expired, a new Section 1 is created and assigned.
- Section 2 should be reassigned to the previous (original) owner.
- An audit report is provided. It uses the authorization as the person performing the action.



I-9: Extension of Expiration Date for State ID and Driver Licenses

Due to the temporary policies for Form I-9 and E-Verify during the COVID-19 pandemic, many states are extending the expiration date of state IDs and/or driver's licenses.

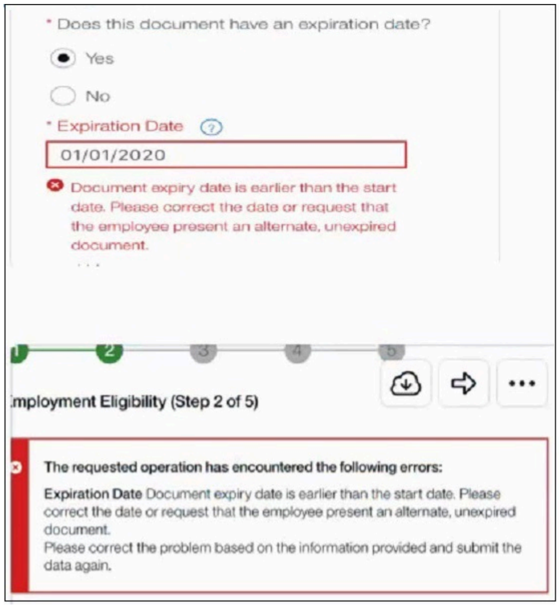
There is a **temporary removal of expiration date validation for state IDs and driver licenses** (I-9 Section 2).

If the new hire's state ID or driver's license expired on or after March 1, 2020, and the state has extended the document expiration date due to COVID-19, then it is acceptable as a List B document for Form I-9.

Notes:

- This removes validation.
- No message displays.
- Requires no down-time.
- Does not generate Section 3 when expired because List B documents are not considered for re-verification.
- Though the state ID expiration date is sent to E-Verify, the expiration date validation must be temporarily removed in order to save the I-9 (thus allowing E-Verify to proceed).

Before:



After:

Searchable PDF Release Notes
In addition to the existing link in the Onboard Downloadable PDF Release Notes topic to a PDF version of the release notes, the major enhancements were added to the topic, making them searchable.

Access the Downloadable PDF Release Notes topic to view (for each release) a summary of the major enhancements, and also access a PDF version of the release notes.

Configurable Changes

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

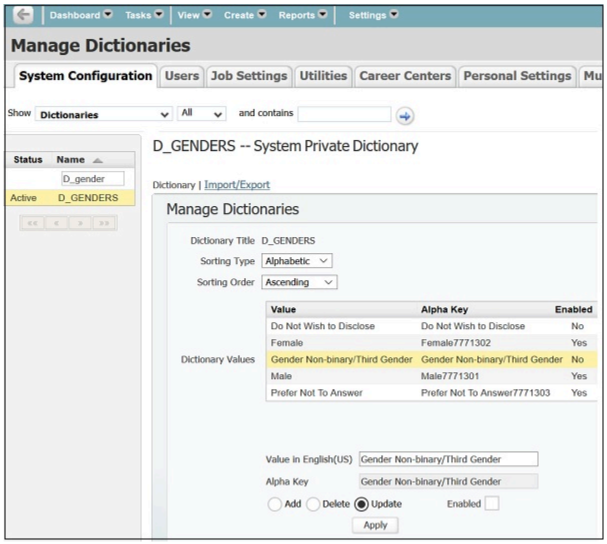
Dictionary: Changes to D_GENDERS
D_GENDERS has two new selections.

- Gender Non-Binary / Third Gender
- Do Not Wish to Disclose

By default, these selections are disabled.

The existing gender selections still remain: Female, Male, and Prefer Not to Answer.

Manage Dictionaries screen, **D_GENDERS**:



Third-Party Approval Enhancement

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

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

Overview

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

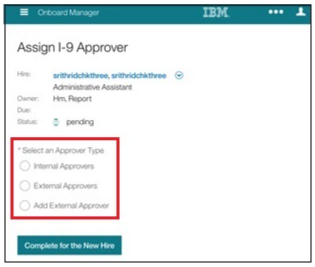
USE IN ONBOARD NEW HIRE

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

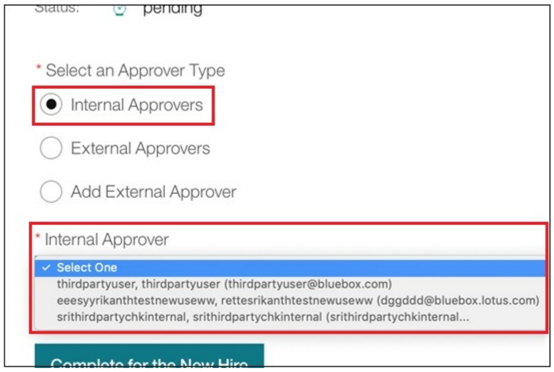
USE IN ONBOARD MANAGER

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

- **Internal Approvers**. This is a prepopulated list of internal third-party approvers. Note: Administrators must use the user import feature in the Admin application to do a one-time sync to give all their necessary Talent Suite users access to Onboard and assign them to the **THIRD-PARTY-USERGROUP** user group.
- **External Approvers**. This is a prepopulated list of external third-party approvers. They are not employees, but need to approve I-9 Section 2 (for example, external legal counsel). Note: All existing third-party approvers who were previously created from I-9 Section 1 are shown as External Approvers. If clients want to move any of the approvers from External to Internal, they must create a maintenance ticket that contains the list of users who will be assigned as internal approvers.
- **Add External Approvers**. This allows users to add external approvers on the fly. Users cannot use this option to add existing employees who do not have access to Onboard.

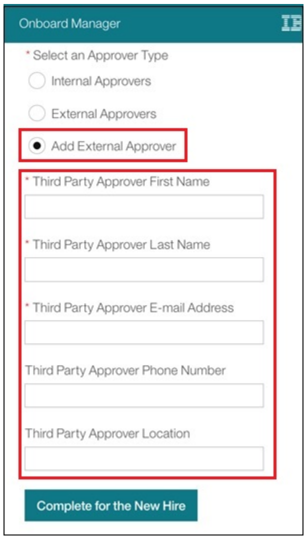


Select an Approver Type: Internal Approvers:

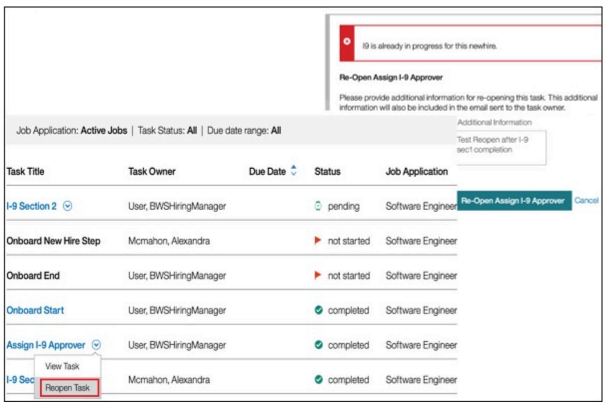


Select an Approver Type: External Approvers: Note: When an onboarding manager selects an External Approver, that person receives an email with a link to access and complete Form I-9. The approver can copy the URL into their browser and complete the form. If approvers have not used Onboard, they receive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

Add External Approver:



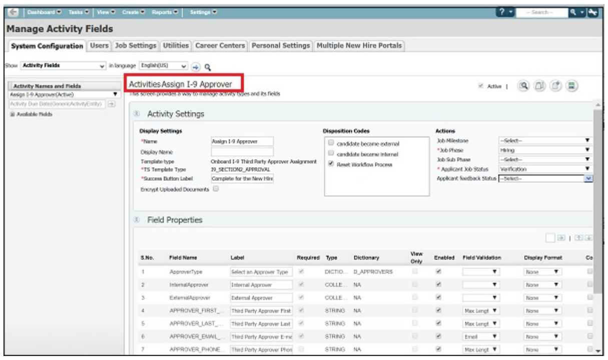
Reopen Assign I-9 Approver:



PROCESS AND CONFIGURATION

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

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



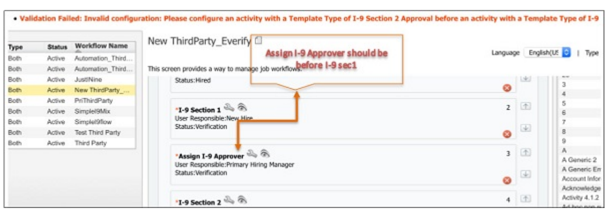
4. On the **Manage Job Workflow** screen, add a new workflow activity called **Assign I-9 Approver** into the workflow. This activity allows clients to configure who the third-party approver for the respective new hire should be.

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

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

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

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



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

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

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

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

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

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

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

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

   - `<%=due.date%>`. Displays due date for I-9 section 2 approval activity to be completed.
   - `<%=new hire.startdate%>`. Displays the start date of the new hire.

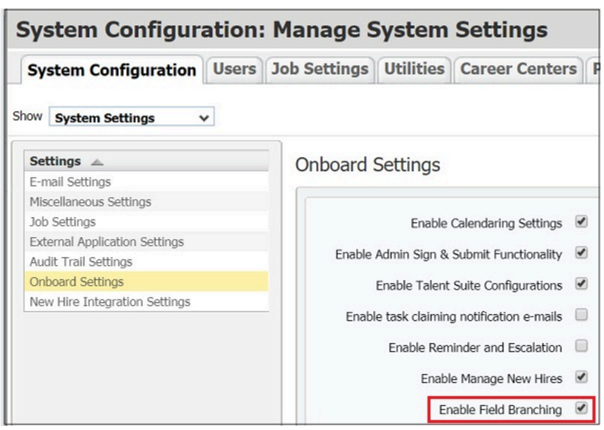
Prerequisite

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

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

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

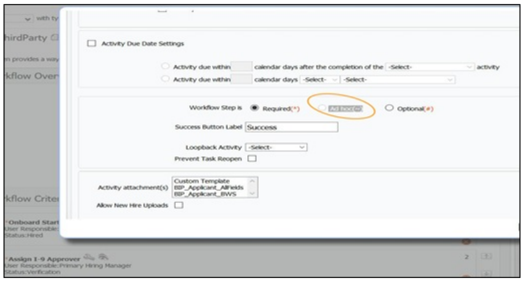
Select the **Enable Field Branching** check box. It enables field branching, which allows only relevant fields to be displayed to a new hire based on previous answers within the same task. Note: Used with Manage Activity Fields.



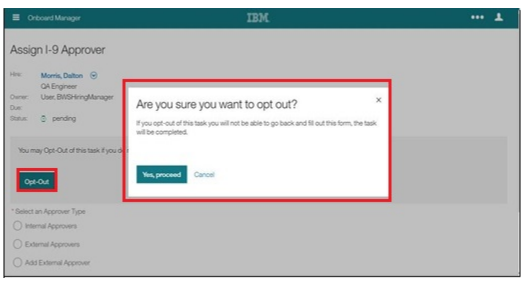
Assign I-9 Approver Task

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

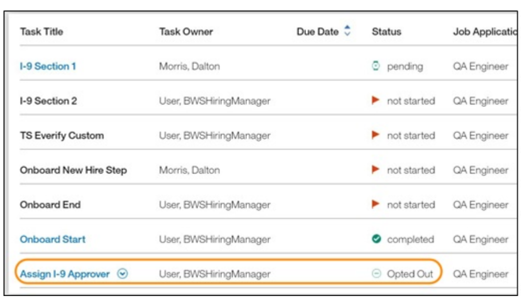
- For **Assign I-9 Approver** task:
  - The **Adhoc** workflow step option is disabled for the Assign I-9 Approver task.



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



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



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

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

Reassign Approver When I-9 Section 2 Is Open

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

Two validations were added:

- When the approval activity is reopened, the link for active/in-progress I-9 Section 2 activity in the **My 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*.

Email Markers Extended to Custom Emails

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

These changes are specific to correspondences configured in Onboard.

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

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

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

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

Change to External/Internal Lists

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

User Type/Group

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

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

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

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

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

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

User Type/Group Mapping from B-O Integration

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

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

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

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

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

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

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

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


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

Fixed Defects

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

RTC Jazz Number	Defect Description
232685	TS003255262 - Payment Method Election value selection issue (specific to IE/Edge browser).
233067	TS003294926 - Client was unable to access documents that are uploaded onto the Onboarding >> Forms.
234253	TS003425439 - I-9 Section 3: Required asterisks for expiration date when they shouldn't be there.
234254	TS003426072 - Audit on Country field for new hire.
234877	TS003509752 - Page refreshes when selecting Action menu for specific task.
235288	TS003552370 - Date Picker window on editing customString field on Personal Information page.
235457	ESCALATED - TS003565157 - The associated dictionary is currently in use and cannot be changed.

RTC Jazz Number	Defect Description
236239	TS003470593 - Handle NoPrintDocuments error for WOTC issue.
236813	In I-9 Audit Report, I-9 reopen is recorded twice. **Known Issue**: For the I-9 Audit Report, there will be duplicate entries of the reopen step (REOPEN_I9SECTIONTWO) in the PDF for any I-9 reopen case .

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