

IBM: BrassRing and Onboard

*BrassRing and Onboard Release Notes
October 2020*



Note

Before using this information and the product it supports, read the information in [“Notices” on page 25.](#)

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, October 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 **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.

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**.



- Candidate Forms - Copy forms to reqs

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 by using the discussion forums for which links are provided in respective feature articles.

BrassRing - Communications Templates for eLinks

Note: This feature is deployed to the **Staging environment - Only** with the current release. This feature will NOT be released to Production on 19 October 2020. A Production date is yet to be determined. See the upcoming release notes for status updates on this feature.

Previously when a BrassRing user sent an eLink from the **Actions** menu, the **Send eLink** screen provided a text box to add a message.

Starting this release, the **Send eLink** screen provides an option to select a communication template from a drop-down menu. The eLink message text box is now replaced with CK editor. The selected communication template can be edited and previewed by the user before they send it out. If the client chooses not to select a communication template, they can add merge tokens and message by using the CK editor that is now available in the screen. In addition, users can add attachments from the local device or the candidate's Talent Record.

The eLink blank form screen now features the option of selecting a communication template.

Communication templates that contain candidate merge tokens are not presented for selection in the drop-down menu.

RTC internal reference # 126313.

Interview Manager - Reschedule Interview - Schedule type Interviewer First

Note: This feature is deployed to the **Staging environment - Only** with the current release. This feature will NOT be released to Production on 19 October 2020. A Production date is yet to be determined. See the upcoming release notes for status updates on this feature.

Starting this release, scheduled interviews that are of Schedule Type **Interviewer first** and are in one of the following statuses has the option of rescheduling:

- Candidate availability requested
- Candidate availability received
- Candidate availability declined
- Invitation pending
- Invitation sent
- Invitation Accepted - Candidate
- Invitation Declined - Candidate
- Invitation Declined - Interviewer
- Scheduled

Rescheduling can be done from the section level button on the **Interview details** page, Card level action, or grid level action on the interview listing page.

Waldgeoff, Watsuburman

Text/Chat Interview for Consultant Info Dev (24BR)

✓ Schedule Interviewer Time
 ✓ Request Candidate Availability

Text/Chat Interview (1 hour)

Reschedule Interview
Cancel Interview

Candidate Availability Requested

Interview Description [✎](#)
 Interview for Consultant Info Dev (24BR)

Interview Style
 1 on 1

Text/Chat Details [✎](#)
 N/A

Lead Coordinator [✎](#) Waldgeoff, Watsuburman
Coordination team [✎](#)
None

Depending on the status of the interview and the response from candidate and interviewer, a specific workflow might be followed to reschedule an interview of the schedule type "Interviewer First".

At the time of rescheduling, if the interview invitation is not yet sent (one among, Candidate availability requested, Candidate availability received, Candidate availability declined, Invitation pending), the coordinator restarts the process by resending a request for the availability of the candidate.

If the invitation is already sent, when interview coordinator selects the reschedule button two options are displayed:

1. **Restart the process by selecting available times for interviewers and requesting updated candidate availability.**

a. Opens the **Manage schedules** page

- 1) The slots that were previously selected are not displayed. By default, the current week is displayed.
- 2) The list of already selected interviewers is displayed and is editable.
- 3) Interview duration can be edited.
- 4) If changes made on the page do not modify either the time slot, duration or any other interview attributes, the page closes when Save is selected. If any of the parameters are modified, they are saved after a communication is sent.
- 5) On selecting Save, if the changes mandate a communication, the Preview Slots Page is displayed.

b. Opens the **Preview Slots** page

- 1) The message *"You have initiated a reschedule for this interview. You will have to resend the candidate availability request in order to save your changes"* is displayed as the page header.
- 2) The **Preview Slots** page displays all the valid slots that are selected from the **Manage Schedules** page.
- 3) The interview coordinator can choose multiple slots from the preview slot page. Upon selection of a slot, and Save, the send communication page is displayed.
- 4) When Save is selected, the **Send communication** page is displayed.

c. Opens Send Communication page

- 1) The message *"You have initiated a reschedule for this interview. You will have to resend the candidate availability request in order to save your changes"* is displayed as the page header.
- 2) The interview coordinator selects the appropriate communication template to send the availability request to the candidate.
- 3) After the communication is sent, all the changes that are made to are saved and the status is updated to **Candidate Availability Requested**.
- 4) The old elink automatically reflects the latest Candidate Availability Request details. However, the old email body that contains prior interview details cannot be modified.
- 5) The candidate zone card view reflects the new Candidate Availability Request details.

2. Reschedule the interview by selecting a new time slot.

a. Opens the **Manage schedules** page

- 1) The slots that were previously selected are not displayed. By default, the current week is displayed.
- 2) The list of already selected interviewers is displayed and is editable.
- 3) Interview duration, date, and time can be edited.
- 4) If changes made on the page do not modify either the time slot, duration or any other interview attributes, the page closes when Save is selected. If any of the parameters are modified, they are saved after a communication is sent.
- 5) On selecting Save, if the changes mandate a communication, the Preview Slots Page is displayed.

b. Opens the **Preview Slots** page

- 1) The message *"You have initiated a reschedule for this interview. You will have to resend the interview invitation in order to save your changes"* is displayed as the page header.
- 2) The **Preview Slots** page displays all the valid slots that are selected from the **Manage Schedules** page.
- 3) The interview coordinator can choose only one slot from the preview slots page. Upon selection of a slot, and Save, the send communication page is displayed.
- 4) When Save is selected, the **Send communication** page is displayed.

c. Opens Send Communication page

- 1) The message *You have initiated a reschedule for this interview. You will have to resend the interview invitation in order to save your changes* is displayed as the page header.
- 2) On the Send communication page, it is mandatory to select the impacted recipients (the newly added interviewer, scheduled changed interviewers, and the candidates).
- 3) Other recipients are optional. Required recipients are automatically selected and user cannot remove these recipients.
- 4) After the communication is sent, all the changes that are made are saved and the status is updated to **Invitation Sent**.
- 5) Interviewers receive the new invitation email and when they select the link to accept it, they receive an updated meeting invite (if they did not accept the previous instance before rescheduling).
- 6) If the interviewer already accepted the previous instance before the rescheduling, they receive an "Update Calendar" meeting invite.
- 7) The removed Interviewers receive an automated notification through a standard email. If they already accepted the prior invite, then they receive another email as a meeting invite with "Remove from Calendar" option.
- 8) When a candidate or an interviewer accepts the rescheduled invitation, based on their prior acceptance or decline status, their automated calendar invite varies.
- 9) If they declined the invite or did not accept the prior invite, they receive a new calendar invite. If they already accepted the prior invite, this invite is going to be a meeting invite with "Update Calendar" option.
- 10) The old eLinks automatically reflect the Rescheduled details. However, the old email body that contains prior interview details cannot be modified.
- 11) The candidate zone card view reflects the rescheduled details with the new interview time.

RTC internal reference # 129489.

Visible Changes

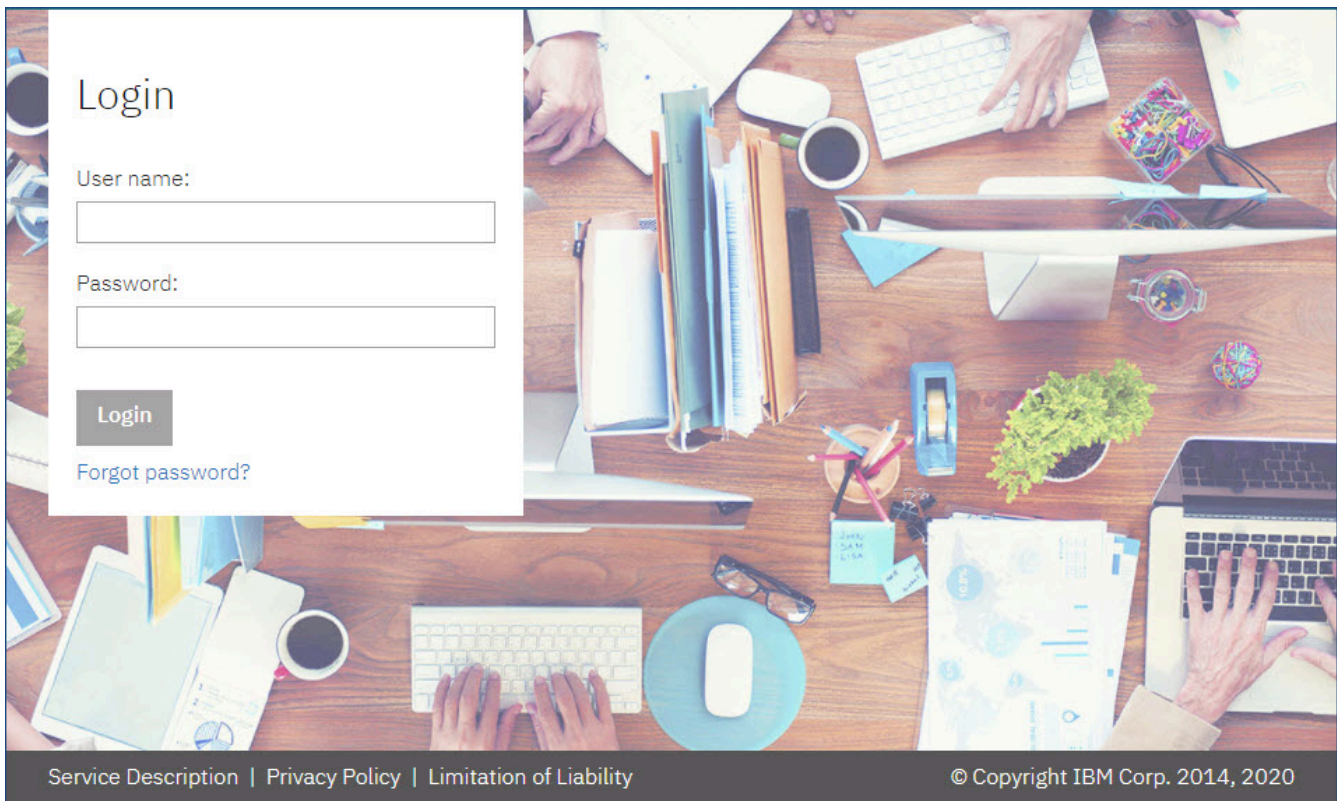
The current release of IBM Kenexa® BrassRing® on Cloud includes the following visible changes for BrassRing and IBM Kenexa Lead Manager.

BrassRing Login Page - Default Background Image

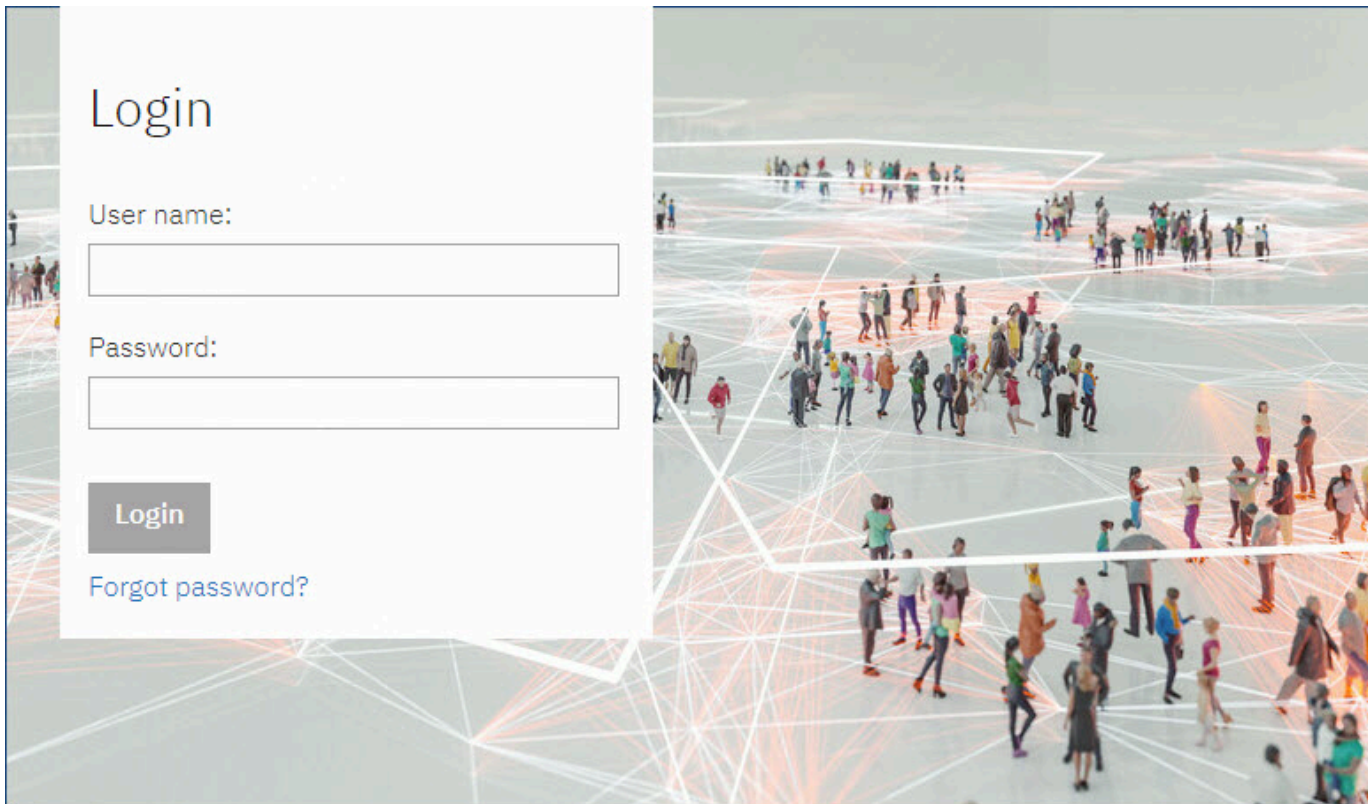
The default background image of the **BrassRing login** page is updated to an image that is inclusive. This change is to the default image only. Clients can choose a different image for their landing page according to their requirements. This change is for BrassRing stand-alone clients. For Talent Suite clients, if they already have a custom background image for their login page based on the Talent Suite configuration, that remains unchanged.

A similar change of background image is going to be delivered to the login pages of Lead Manager, Onboard and the Talent Suite during their respective upcoming builds.

The old default background image for the **BrassRing login** page.



The new default background image for the **BrassRing login** page.



RTC internal reference # 131684.

Interview Manager - Reschedule Interview - Schedule type Ask Candidate First

Note: This feature was deployed to the Staging environment during the release 20.09.08. This feature is released to Production during the current release.

Starting this release, scheduled interviews that are of Schedule Type **Ask candidate first** and are in one of the following statuses has the option of rescheduling:

- Candidate availability requested
- Candidate availability received
- Candidate availability declined
- Invitation pending
- Invitation sent
- Invitation Accepted - Candidate
- Invitation Declined - Candidate
- Invitation Declined - Interviewer
- Scheduled

Rescheduling can be done from the section level button on the **Interview details** page, Card level action, or grid level action on the interview listing page.

Hello, **Rafan!**

All Open Reqs (23) My Open Reqs (23) My Tasks (0) My Candidates My Reqs Pending Approval (8) My Approved Reqs (0) **Interviews (4)** Edit Tabs

Filters (2) » | Actions ☺

Interview Title	Status	Auto req ID	Title	Interview Date	Date Modified
Interview Title	Expired	33BR	Demo-Global Support Center Agent	28-Jan-2020, 9:00 am-11:00 am EDT	14-Jan-2020, 1:28 am IST
Phone Interview - Phone Interview	Expired	11BR	Consultant Info Dev	31-Dec-2019, 3:00 pm-5:00 pm EDT	01-Jan-2020, 12:05 am IST
Interview - In Person Interview	Expired	33BR	Demo-Global Support Center Agent	Not Scheduled	14-Jan-2020, 1:38 am IST
Interview - In Person Interview	Expired	17BR	Project Consultant	Not Scheduled	09-Feb-2020, 5:44 pm IST

Depending on the status of the interview and the response from candidate and interviewer, a specific workflow might be followed to reschedule an interview of the schedule type "Ask candidate first".

At the time of rescheduling, if the interview invitation is not yet sent (one among, Candidate availability requested, Candidate availability received, Candidate availability declined, Invitation pending), the coordinator restarts the process by resending a request for the availability of the candidate.

If the invitation is already sent, when interview coordinator selects the reschedule button two options are displayed:

1. Reschedule the interview by selecting a new time slot.

a. Opens the **Manage schedules** page

- 1) The slots that were previously selected are displayed (if they are not in the past). If the selected slots are in the past, the current week is selected.
- 2) The list of already selected interviewers is displayed and is editable.
- 3) Interview duration can be edited.
- 4) If changes made on the page do not modify either the time slot, duration or any other interview attributes, the page closes when Save is selected. If any of the parameters are modified, they are saved after a communication is sent.
- 5) On selecting Save, if the changes mandate a communication, the Preview Slots Page is displayed. The preview slot page is displayed only if multiple time slots are selected. Upon selection of a single slot, the **Send communication** page is displayed.

b. Opens the **Preview Slots** page

- 1) The **Preview Slots** page displays all the valid slots that are selected from the **Manage Schedules** page.
- 2) Upon selection of a slot, and Save, the send communication page is displayed.
- 3) The following message is displayed on the header. *"You have initiated a reschedule for this interview. You must resend the interview invitation in order to save your changes."*

c. Opens Send Communication page

- 1) Select all the impacted recipients. Mandatory recipients are automatically selected.
- 2) After the communication is sent, all the changes that are made to are saved and the status is updated to Invitation sent.
- 3) Based on the previous response from candidates and interviewers, their automated calendar invite is updated and sent. If the previous invitation is declined or not yet accepted, a new

invitation is sent. If the previous invitation is accepted, the invitation is sent as a calendar update.

2. Restart the process by requesting updated candidate availability.

- a. This action displays a pop-up window that allows the coordinator to restart the candidate availability request by specifying a new date range, total duration.
- b. When the coordinator selects Continue, the preview slots page is displayed. Coordinator selects multiple slots and selects Save.
- c. The following message is displayed on the header: *"You have initiated a reschedule for this interview. You will have to resend the candidate availability request in order to save your changes."*
- d. This action opens the send communications page.
- e. After the coordinator sends the communication, the interview status is updated to **Candidate Availability Requested**.
- f. Interviewers that are previously added to this interview are retained and the list can be edited.
- g. If the coordinator chooses the cancel at any point, the existing interview remains in its original status and none of the changes are saved.

RTC internal reference # 129488.

Interview Manager - Format Detail Required on Send Invitation

The interview format details like phone number or location information are essential for the interview attendees. However, providing this information is optional at the stage of sending invitation. To ensure that the interview details are available to the candidates, starting this release, the system validates to find if interview format details are available on the **Send invitation** page. If the format details are not available, the following warning message is displayed indicating the details that are missing:

This interview is missing [Format Details] value. Please [add] this before proceeding with the invitation.

-- [Format Details] is a token that displays the specific missing field label, example, Phone details, Location, or other value.

-- [add] is a hyperlink and upon selection, opens a pop-up with a text box to enter the format details. On entering a value and saving, the pop-up closes and the error message is removed.

Send Invitations

Jobs, Requisition - Search Results - Req 123456789 (123456789)

! This interview is missing Phone Details value. Please add this before proceeding with the invitation.

[Edit communication](#) [Preview](#)

Communication template:

Intervite - Interviewer

Communication details:

Format Font Size [Rich Text Editor Icons]

[#RequisitionStd:Title#].

Interview Details:

Coordinator: [#InterviewStandard:InterviewCoordinatorname#]

Coordinator email: [#InterviewStandard:InterviewCoordinatoremailid#]

Send Invitations

Jobs, Requisition - Search Results - Req 123456789 (123456789)

! This interview is missing Interview Location value. Please add this before proceeding with the invitation.

Attached files:

[Browse](#) or drop files in this section.

Interviewer Message

[Edit communication](#) [Preview](#)

Communication template:

Intervite - Interviewer

Interview Location

[Input Field]

[Submit](#) [Cancel](#)

RTC internal reference # 128501.

Candidate Forms - Copy Forms To Reqs

Starting this release, when a candidate is copied or moved from one requisition to another, the candidate's forms that are already completed can also be copied.

A new column **Copy Form** is added next to the eLink column to the **Forms List** page. This column is displayed only when the user has the user type privilege **Candidates - copy per req forms** available. When the BrassRing user selects the copy icon available in the new column, a pop-up opens. Users can select the reqs from a list of reqs that are presented in a multi-select control.

The reqs are displayed based on the following conditions:

- Req's where the candidate is filed and the form does not exist.
- Req's where the candidate is filed.

Note: This feature is available only for per-req forms. Forms like the Gateway Questionnaire forms, or the Job response forms are out of scope for this feature.

RTC internal reference # 130937.

Candidate Search - Export to Excel

In candidate search, it was observed that even when a limited number of candidates were selected for export to excel, all the candidates displayed in the page were being exported. For example, in a page that displays 50 candidates, if the user selected only 10 and performed export to excel, all the 50 candidates were exported. This behavior is corrected during this release. Only the selected candidates are now exported to the excel file when a user performs an export to excel.

RTC internal reference # 132219.

Candidate Forms - Form Field Display Names Truncated

The maximum length for a form field's display name is 4000 characters. However, it was observed that in some screens, the display name is truncated at 500 characters. This behavior is observed on the Filter section of the req folders. Starting this release, the filter section displays the form field display name in full text up to 4000 in the Filters section of the req folder.

RTC internal reference # 131656.

Countries and States - State Code of Guam

Previously, the state code for the state of Guam was displayed as **Guam** instead of a two letter code. Based on a customer request, the state code is updated to **GU** starting this release. It is recommended to update any existing integrations that have the state code set to Guam to the updated state code.

RTC internal reference # 131065.

Communication Templates - Upload Image Button

In the Add new communication template screen, it was observed that the image upload button's label text is changed to **Send to server**. To avoid ambiguity, this button label is changed to **Upload Image**

RTC internal reference # 131327.

Talent Gateway Forms - Date Field Validation

During release 20.09.08, advanced date field configuration and validation was made available for the candidate forms, req forms, and req subsidiary forms. This feature is now available for the candidate form date fields present in the Talent Gateways. The validation is available based on the new calendar configuration in the BrassRing Workbench.

When Workbench users edit the form field attributes in Workbench, a new **Calendar configuration** is available using which, the date field can be customized.

Define field attributes Audit Trail

Field name Todays_Date

Calendar configuration

Required for form creation from TG Yes No

Purge field data via partial purge? Yes No

Search / Output

Searchable? Yes No

Outputable? Yes No

Used (DATE)	Available (DATE)	Enable Search & Output
1	74	<input checked="" type="checkbox"/>

Confirmation Settings

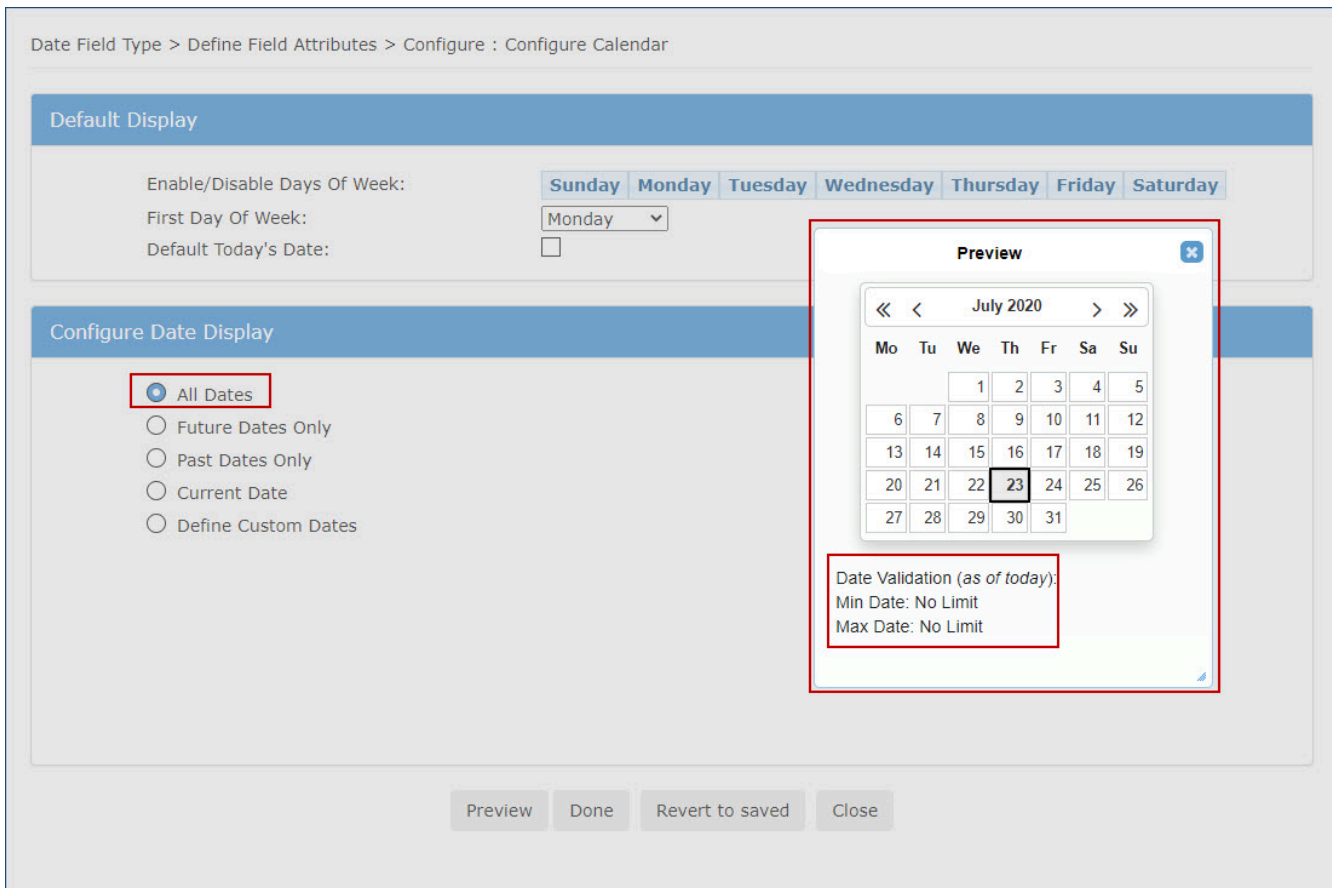
Enable confirmation field Yes No

Confirmation field prefix label [English (US)]

Field associations

Enable Parent Child

Selecting configure opens the new calendar configuration page.



Candidate Form Date Fields that are used in the following TG workflow now feature the date fields based on the new configuration:

- Regular Gateway Questionnaire question widget (during application)
- Job-Specific Questions for a job posting (where the Gateway Questionnaire includes JSQ widget and during application)
- Social Referral questions (during social referral of jobs)

Client Administrators that configure the calendars must configure the date question label and the helper text that clearly explains the expected input dates.

RTC internal reference #129821.

Talent Gateways - Basic Date Field Validation Missing

Previously, if Talent Gateway referral questions contained date fields, input validations were missing for these fields. The system accepted invalid dates (like 02-31-2020) and out of range dates that did not meet the field's criteria without displaying any error messaging. These date fields are updated to accept only accurate dates. When candidates enter invalid dates like 31 Feb 2020, or any other date out of acceptable range, the date field now displays an appropriate error message. The date fields now display an error message when invalid date is entered. If an out of range date is provided, an error message is displayed. The error message depends on the type of inaccuracy of the entered date.

RTC internal reference # 131400.

Candidate Account Retrieval - Talent Gateway Username Display for Account Bypass

During the release 20.09.08, the display of GUID (an automatically created candidate number) instead of username is updated. An appropriate message was displayed stating the possible reasons for unavailability of the username for candidates that skip account creation on the Talent Gateways. A similar update is made in the candidate account retrieval tool that is used by BrassRing administrators. The display of GUID is replaced by an appropriate message. This change is applied for

candidates that skip sign in and do not create accounts during the application process on the Talent Gateway.

RTC internal reference # 131493.

Talent Gateways - Twitter Unavailable on Internet Explorer 11

Twitter is no longer available on the Internet Explorer 11 browser. When a candidate accesses one of the Talent Gateways by using this browser and selects the **Twitter share** icon from the job description page, a message is displayed stating that the browser is not supported. To avoid further inconvenience to the candidates, starting this release, the following change is made. If a candidate accesses a Talent Gateway by using the Internet Explorer 11 browser, the job description page does not feature the **Twitter share** icon.

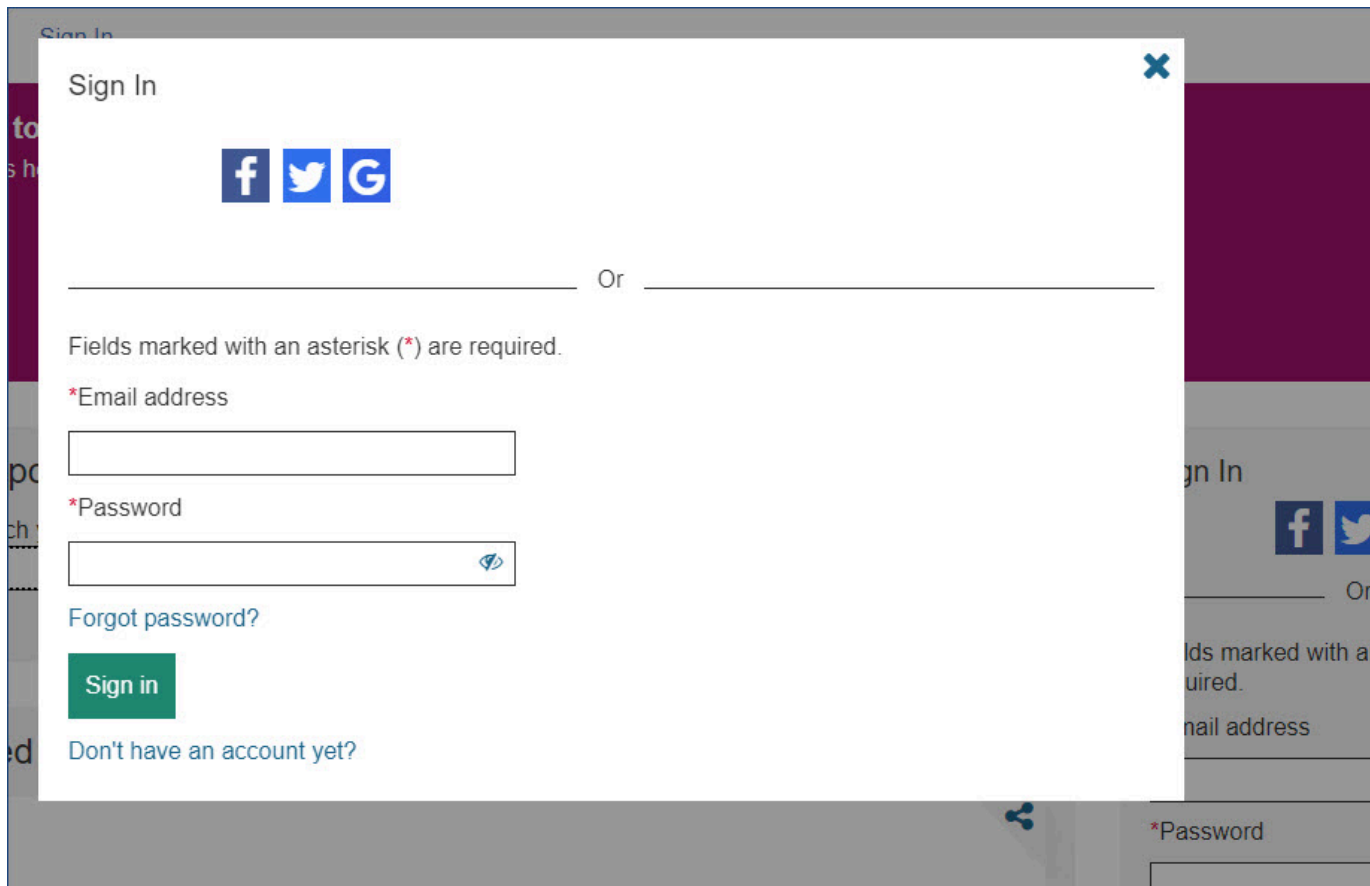
RTC internal reference # 131534.

Talent Gateways - Google Sign In Branding Updates

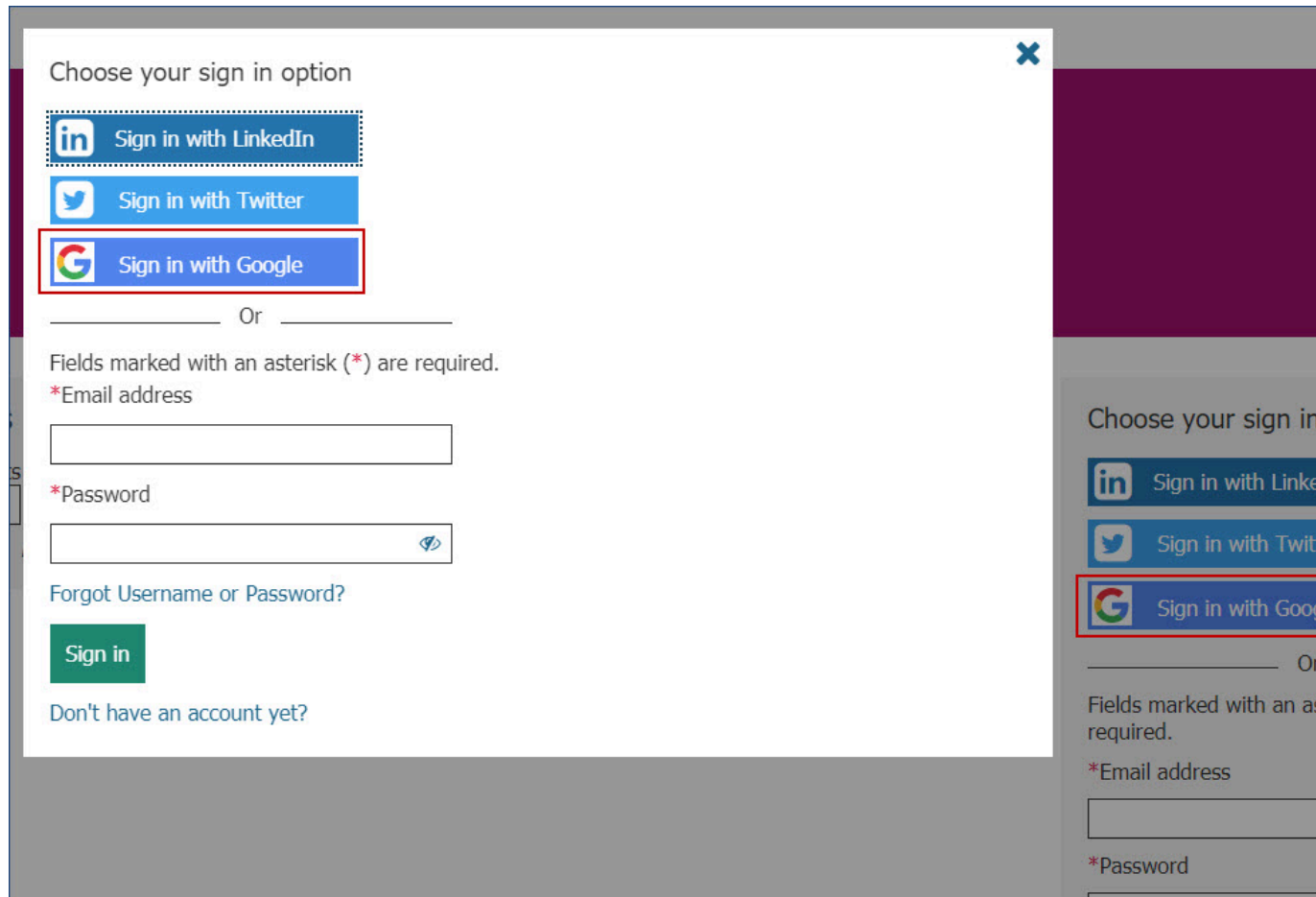
Based on the branding updates from Google, the Google Sign in and Sign up options present on the Talent Gateways are updated. The buttons on the following pages are updated:

- Talent Gateway home page - Sign-In Side bar
- Any page (sign in header link) - Sign-in modal
- Apply - Sign in page (full page)
- Create account (bypass/agree to privacy policy) - social medial tab.
- The Import from **Google Drive** button is also updated.

Before this update.



After this update.



RTC internal reference # 131066.

Talent Gateways - Communications - Line Break

When a candidate applies to job without creating a profile, a candidate communication is sent with a candidate reference number. A line break is added between the main message and the additional text that is added suggesting the candidate to sign up. It was observed that a line break was being added to candidate communications where it was not necessary. Based on a client request, this additional line break is removed starting this release.

RTC internal reference # 131833.

Background Check Common Services (BGCS)- New Mapping Fields for Choice Point

Based on a client request, two new mapping fields are added to the BGCS for the Background check vendor Choice Point. **Email address in employment screening** and **Additional items in license** are the new fields that are requested by the client to be added for the integrations to be successful.

RTC internal reference # 131788.

Lead Manager - Action Log

Starting this release, the Lead Manager lead profiles feature an action log. All the actions that are taken by Lead Manager users on a profile are recorded and presented in the action log. Users with appropriate privileges can access and view the action log to understand what were the actions that were previously taken on a profile. Here's a list of the actions that are logged on the lead profile:

- Add lead profile.
- Edit lead profile.
- Set lead confidential.
- Delete lead confidential.

- Add attachment.
- Delete attachment.
- Add notice.
- Delete notice.
- Add note.
- Delete note.
- Add lead to campaign.
- Remove lead from campaign.
- Add lead to BR folder.
- Add lead to BR req.
- Update lead status.
- Send communication.
- Unlink lead from BR.

When any action is taken upon a profile, a log entry is made and displayed in the profile.

RTC internal reference # 130499.

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.

Forms - Text Fields - Custom Validations

Starting this release, the text fields in forms can be configured with custom validations. Clients can provide their custom validation rules to have the text field inputs validated.

Workbench Path: **Tools > Forms > select Configure > Candidate Forms > Administer Form fields > Edit field attributes on text form field > Save and Continue > On Input validation > Custom > Configure a New Rule > Validation Templates > Custom**

Note: Validations created in expanded frames will only be considered.

New Validation Rule

Alphanumeric Patterns >

Numbers Only >

Validation Templates v

Enable Rule (Select checkbox to enable and save validation rule)

Choose template type: Standard Custom Build your own validation expression

`^([jJ]){1}([\d]){7}$`

Description

*Input Validation: Please enter j or J and 7 digits

Description:

Try it out: j7832333 ✓

Save Validation Templates

Cancel

RTC internal reference # 130982.

Talent Gateway - Footer Enhancements

Starting this release, the Talent Gateway footer is enhanced to accommodate more number of links. Before this release, the footer allowed a maximum of four custom links in addition to the IBM standard links in a single row.

Starting this release, the footer can be configured to accommodate up to 10 links in up to three rows. In order to enable this configuration, the Responsive layout configuration section is also updated in the Workbench.

The additional footers that are added during this release are displayed differently based on the device the candidates use.

- On desktops, multiple links are allowed per row (depending on the text and the number of links in a row), with up to three rows. Scrolling is provided according to the requirement.
- On tablets, multiple links allowed per row (depending on the text and number of links in a row), with up to three rows. Scrolling is provided according to the requirement.
- Phone, one to two links allowed per row, with vertical stacking of up to three rows total. Scrolling is provided according to the requirement.

Responsive layout configuration section is updated:

Responsive Layout Details - Gateway To Talentz

Footer links
Note: Entries without a URL will be presented as static text.

X URL:
Name:

X URL:
Name:

X URL:
Name:

X URL:
Name:

X URL:
Name:

X URL:
Name:

X URL:
Name:

X URL:
Name:

X URL:
Name:

X URL:
Name:

RTC internal reference# 127166, 127452, 131718.

BrassRing Workbench

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

Gateway Questionnaire - Message Update

A validation message is displayed when a Workbench administrator attempts to create a duplicate widget in a Gateway Questionnaire. This message is now updated to add a new upcoming feature. The following message is the updated message:

There can be no more than one instance of each of the following types of widgets: Attachments, Resume upload, Cover letter upload, Education builder, Experience builder, Codes, Job-specific questions, eSignature, Work Opportunity Tax Credit.

RTC internal reference # 131951.

Onboard

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 **October 2020 release of Onboard**:

- US Staging - October 8, 2020
- US Production - October 17, 2020

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.

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.

User Page Performance Improvement

Performance improvement.

Previously, a user page was loading all information for available users.

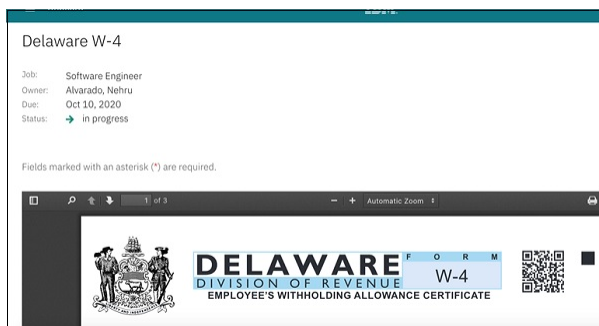
Now, only needed information is loaded for the users list.

Updates to State and Federal Forms

Updates to maintained forms.

State Forms

Delaware W-4 Employee's Withholding Allowance Certificate - DE W-4 (new) - Delaware uses their own custom W-4 instead of the Federal W-4. The IRS has issued a new Form W-4 that does not allow for exemptions when calculating employee withholding. Because Delaware still allows taxpayers to take a deduction or a personal credit for exemptions, Delaware has created a new form, a Delaware-specific W-4, for taxpayers to use in connection with calculating their withholding for Delaware purposes.



Coming Soon: Talent Suite Branding Changes

As part of efforts to improve Talent Suite branding designs and user experience, there will be enhancements to out-of-the-box images to improve the overall style in Talent Suite applications.

Newer **default images** for the **background/login** and **hero** images will be provided.

Depending on the branding you have configured, there may be a visible change inherited.

Configurable Changes

Configurable features must be configured or enabled to be visible and available to users.

Manage New Hires: Citizenship Status from I-9 Is Available for Search/Output

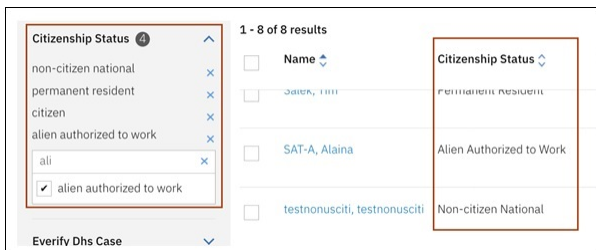
The **Citizenship Status** field from the **I-9 Section 1** activity of the **Manage Activity Fields** screen is now available in the **Manage New Hires** page. This field is **searchable/outputtable**.

The column name of the field is **Citizenship Status**. The data can also be filtered based on this field. The values that needed for this field to filter the data are:

- **Alien Authorized to Work**
- **Permanent Resident**
- **Non Citizen National**
- **Citizen**

The value from the latest I-9 completed for the new hire/requisition combination displays.

Known Issue: In Manage New Hires, when the onboarding manager tries to search the Citizenship Status field with keywords such as *citi/citizen*, the search results include new hires with both citizen and non-citizen status.



I-9: Auto-Complete Third Party Approver Assignment Template

An admin can configure the **Onboard I-9 Third Party Approver Assignment** template to be auto-completed when the approver is passed through B-O integration so that the admin doesn't need to manually complete the task.

Onboard Manager:

Task Title	Task Owner	Due Date	Status	Job Application
Onboard Start	User, BWSHiringManager		completed	Software Engineer
BWS Admin	Hiring Manager		completed	Software Engineer
Assign I-9 Approver	Hiring Manager		completed	Software Engineer
NO_Activity_no_temp	Hiring Manager		completed	Software Engineer

Onboard Configuration:

- If there is no data, or if the data found does not have a user associated with the correct user group, then **no** auto-completion is performed.
- The configuration setting drives the allowing of auto-completion.
- If Onboard Start is completed, then Assign I-9 Approver must be manually completed.

Onboard Start
User Responsible: Primary Hiring Manager
Status: Hired

BWS Admin
User Responsible: Hiring Manager
Status: Started

Assign I-9 Approver
User Responsible: Hiring Manager
Status: Verification

Make all the activities in this level concurrent

When configured at Level 3, Assign I-9 Approver will auto-complete only after the completion of a Level 2 task.

Workflow Criteria

Onboard Start
User Responsible: Primary Hiring Manager
Status: Hired

NO_Activity_no_temp
User Responsible: Hiring Manager
Status: Verification

Assign I-9 Approver
User Responsible: Hiring Manager
Status: Verification

Result in Onboard Manager:

Task Title	Task Owner	User Name	Status	Job Name
NO_Activity_no_temp	Hiring Manager		pending	Software Eng
Assign I-9 Approver	Hiring Manager		Completed	Software Eng
BWS Admin	Hiring Manager		not started	Software Eng
GenericActivity_gen_act	Gonzales, Derek		not started	Software Eng
I-9 Section 1	Gonzales, Derek		not started	Software Eng
Generic Activity_No Reg Sig	Gonzales, Derek		not started	Software Eng
BusTask_Complete	Gonzales, Derek		not started	Software Eng
Onboard End	User: BWSHiringManager		not started	Software Eng
I-9 Section 2	Hiring Manager		not started	Software Eng
Onboard Start	User: BWSHiringManager		Completed	Software Eng

A new setting called **Enable I9 ThirdPartyApprover Assignment Auto-Completion** was added to **Onboard Settings** and it **MUST** be enabled for this functionality to work.

Onboard Settings

- Enable Admin Sign & Submit Functionality
- Enable Talent Suite Configurations
- Enable task claiming notification e-mails
- Enable Reminder and Escalation
- Enable Manager New Hires
- Enable Field Branching
- Enable HTML coding in field name
- Enable I9 ThirdPartyApprover Assignment Auto-Completion**
- Allow New Hires to Reopen Completed Tasks
- Enable I-9 Section 3

Number of days (before document expiration) to create I-9 Section 3 Task: 1

I-9 Section 3 Task Responsible User: Hiring Manager

The task is marked as completed by **Onboard SystemUser** in the database to show the difference when the setting is enabled.

*Assign I-9 Approver

Job Title : 78517042 Software Engineer
Current Status: **Hired**

Please use the Talent Suite to perform any activity related actions.

*Third Party Approver First Name *Third Party Approver Last Name
*Third Party Approver E-mail Address Third Party Approver Phone Number

Add Notes

Completed By Onboard, SystemUser on 09/01/2020 11:45:37 AM
Last Modified By Onboard, SystemUser on 09/01/2020 11:45:37 AM

Discontinue Onboarding Option for New Hires Is Based on New Capability

The **Discontinue Onboarding** option is now based on a new capability: **Enable Global Discontinue**.

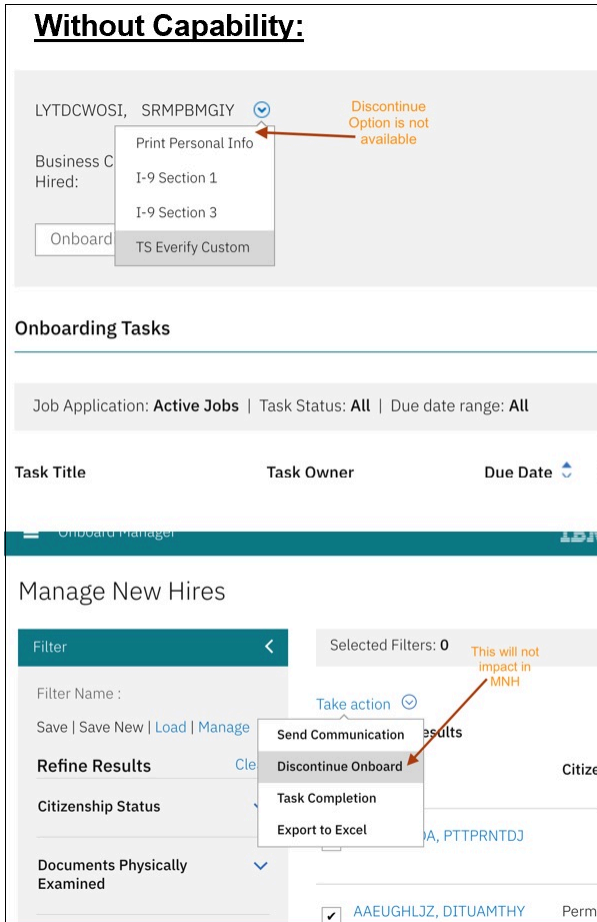
USE IN ONBOARD MANAGER

The global discontinue onboarding option persists for users who have it enabled even when there aren't any open job applications. When this is the case, the message *No active job applications* displays.

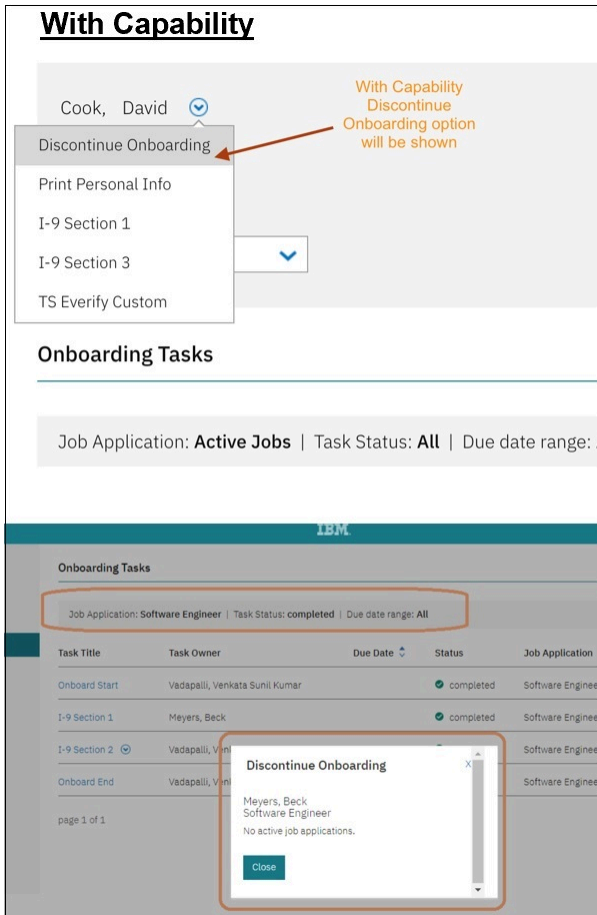
In the interface, the **Discontinue Onboarding** option displays in the drop-down by the new hire name.

When a new hire is discontinued through this action, no action is taken on a completed job application. The system acts on the in-progress job applications the same as it does now.

Without capability: Discontinue Onboarding option is not available, and Discontinue Onboard has no impact in Manage New Hires:

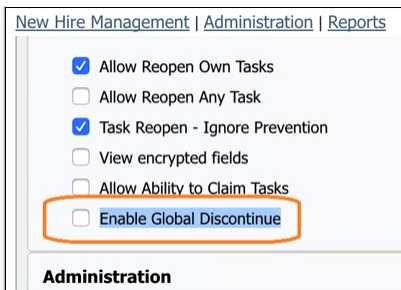


With capability: Discontinue Onboarding option is available, and Discontinue Onboard has impact in Manage New Hires:



CONFIGURATION

On the **Manage Users: User Types** screen, in the permissions for **New Hire Management**, there is a new capability: **Enable Global Discontinue** check box. By default, the check box is not selected for all clients and all user types. This check box **MUST** be selected to enable the global discontinue functionality.



Fixed Defects

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

RTC Jazz Number	Defect Description
236780	ESCALATED - TS003325301 - New hire's data not updated Oracle to Onboard. No termination data present in Onboard when termed in Oracle - check integration.
237967	TS003867684 - Unable to complete I-9 Section 3 standalone task.

RTC Jazz Number	Defect Description
238497	TS003944148 - Onboard Gender Field issue when Previous Step button is used.
239164	TS004053566 - Onboard error for Identification task S-1-001.
239609	TS004106958 - I-9 Task Group inconsistent (repeat ticket) / TS004107619 - Final New Hire Task group inconsistencies.
239703	TS004112860 - I-9 Section 3 required asterisks for expiration date when shouldn't be there.
239777	TS004124227 - I-9 Section 2 task for new hire will not submit at Step 5.
240332	TS004211314 - Re-verification report issues.
240487	ESCALATED - TS004236109 - Candidate not able to complete the W-4 / 2nd skill case : TS004266280 - TS004293911.

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