

IBM: BrassRing and Onboard

*BrassRing and Onboard Release Notes  
September 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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# Chapter 1. BrassRing and Onboard Release Notes, September 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.

### **End of Support for Classic Talent Gateways**

#### **Everything You Need to Know About End of Support for Classic Talent Gateways**

**Note: Classic Talent Gateways (Full and Basic) are retired. Support is no longer available for these Talent Gateways.**

If you recently moved to the new responsive candidate experience and are looking for information and help:

Watch the [Responsive Apply Overview and Configuration Webinars](#) to understand configuration instructions, and much more!

IBM hosted multiple sessions on upgrading 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.

## 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.

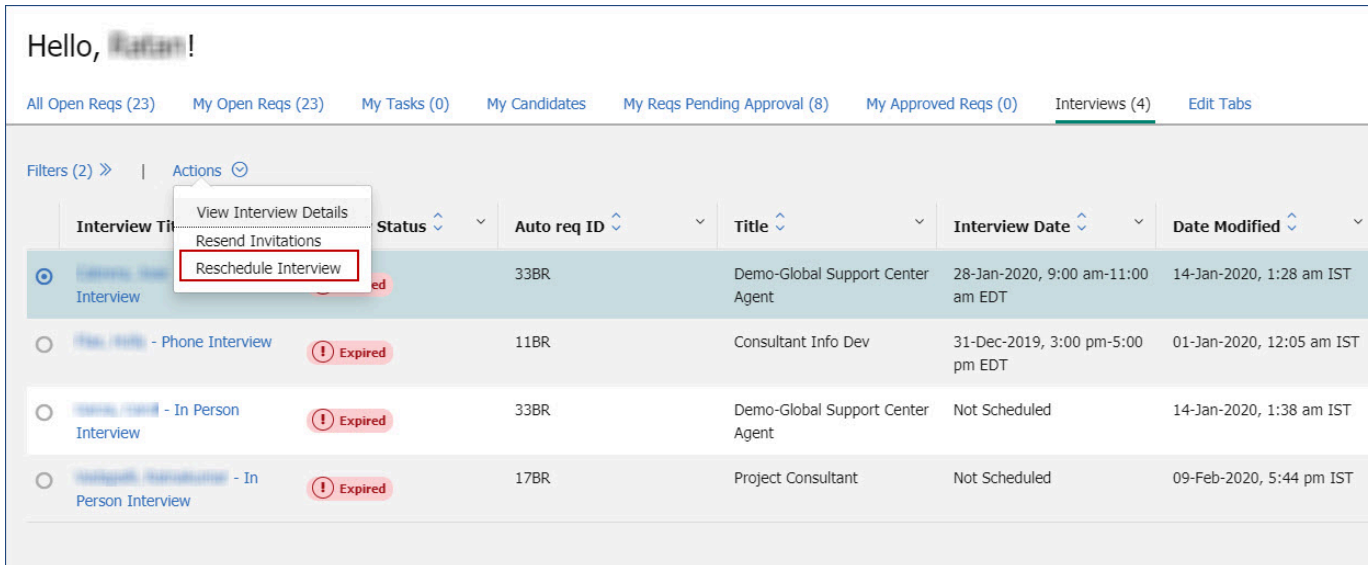
### Interview Manager - Reschedule Interview - Schedule type Ask Candidate First

**Note:** This feature is deployed to the **Staging environment - Only** with the current release. This feature will NOT be released to Production on 15 September 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 **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
- 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.



The screenshot shows the 'Interviews' section of the Interview Manager. At the top, there is a greeting 'Hello, Ratan!' and navigation tabs for various request types. Below this is a table of interviews. A context menu is open over the first row, showing three options: 'View Interview Details', 'Resend Invitations', and 'Reschedule Interview'. The 'Reschedule Interview' option is highlighted with a red box.

Interview Title	Status	Auto req ID	Title	Interview Date	Date Modified
Interview - Interview	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.
  - 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 will 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.

## Visible Changes

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

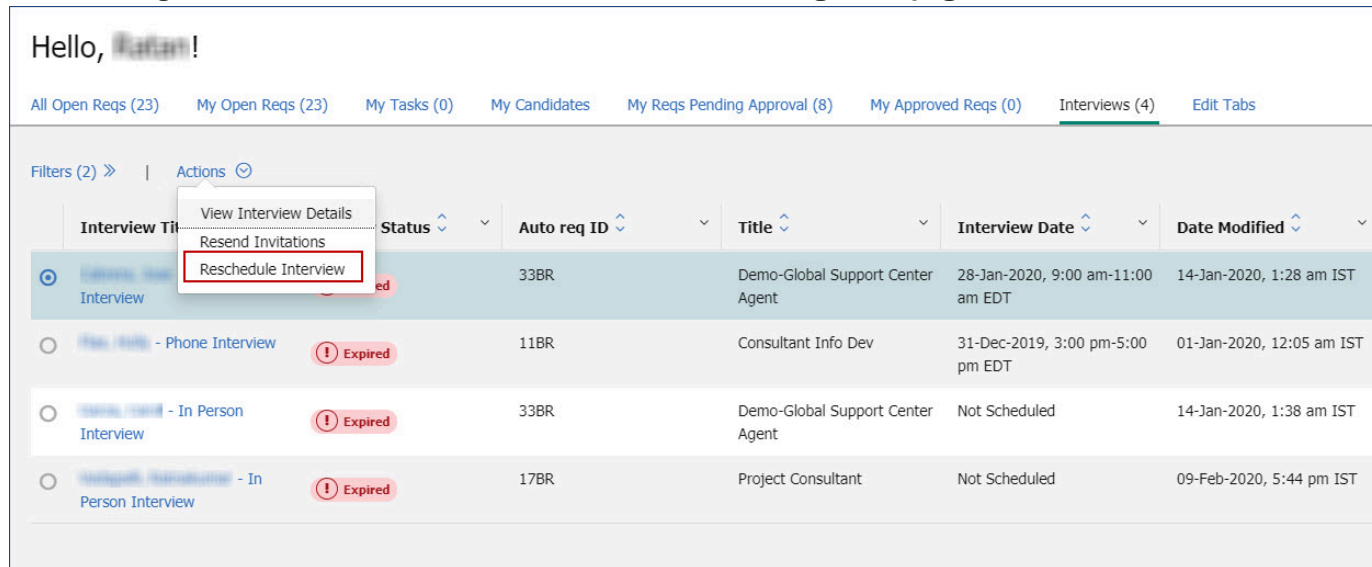
### Interview Manager - Reschedule Interviews - Schedule type Confirmed Date and Time

**Note:** This feature was previously deployed to the Staging environment. Starting this release, the feature is available in Production environment.

Starting this release, scheduled interviews that are of Schedule type **Confirmed Date and Time** and in one of the following statuses has the option of rescheduling:

- Invitation Sent
- Invitation Accepted - Candidate
- Invitation Declined - Candidate
- Invitation Declined - Interviewer
- Interview Scheduled

Rescheduling can be done from the Interviews Tab on the **BrassRing home page**.



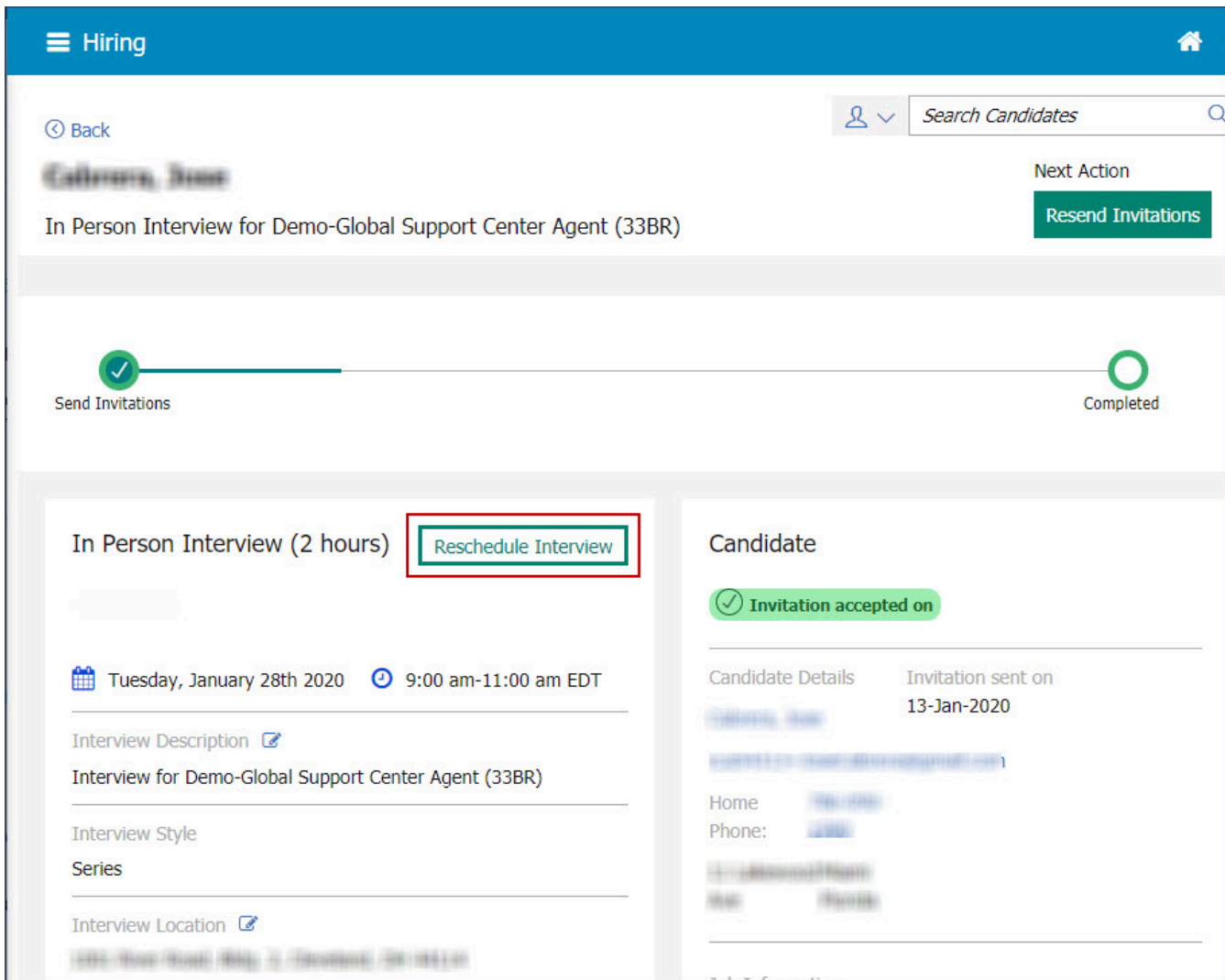
The screenshot shows the BrassRing interface with the 'Interviews' tab selected. A table lists several interviews. The first row is selected, and a context menu is open over it, showing options: 'View Interview Details', 'Resend Invitations', and 'Reschedule Interview' (which is highlighted with a red box). The table columns are: Interview Title, Status, Auto req ID, Title, Interview Date, and Date Modified.

Interview Title	Status	Auto req ID	Title	Interview Date	Date Modified
Interview - Interview	Expired	33BR	Demo-Global Support Center Agent	28-Jan-2020, 9:00 am-11:00 am EDT	14-Jan-2020, 1:28 am IST
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

Alternatively, rescheduling option is available from the card view in the Interview Management section of BrassRing.

The screenshot shows the 'Hiring' interface with 'Interview Management' as the main heading. Below the heading, there are 'Filters (2) >>' and 'Sort: Req ID' with a dropdown arrow. Two interview cards are displayed, both marked as 'Expired' with a red exclamation mark icon. The left card is for 'Catherine, In-person Interview' with a date of '28-Jan-2020, 9:00 am-11:00 am EDT' and a role of '33BR Demo-Global Support Center Agent'. A dropdown menu is open over this card, showing three options: 'View Interview Details', 'Resend Invitations', and 'Reschedule Interview', with the last option highlighted by a red box. The right card is for 'Madhupati, In-person Interview' with the status 'Not Scheduled' and a role of '17BR Project Consultant'. Both cards have a 'Next Action' section with a link to 'Resend Invitations' or 'Send Candidate Availability Request'. At the bottom left, there is a pagination control showing '< 1 >'.

For interviews that meet the criteria, **Reschedule Interview** is displayed in the Interview details section.



Selecting **Reschedule Interview** in any of the mentioned screens displays the **Manage Schedules** page. On the **Manage Schedules** screen, the information from the previous interview like the name of the interviewer, time slot, is retained. However, the interviewer name, interview duration, time slots, can be changed. Details like the type of interview, and schedule type cannot be changed. Based on the changes that are made to the interview schedule, communication is sent to the impacted interviewers and candidates. Similarly, based on the actions that are taken by the user, alert messages are displayed to the user on screen. Users make required changes and select appropriate communications template to send the communications to relevant recipients for the changes to be saved. If only interviewers are changed (and not time slot), then communication need not be sent for all the recipients.

Reschedule action is disabled for the interviews in the following Interview Statuses:

- Invitation Pending (in this case, "Manage Schedules" action displays instead)
- Canceled (no edits are allowed at this status)
- Completed (no edits are allowed at this status)
- On-Hold (no edits are allowed at this status)

RTC internal reference # 129487.

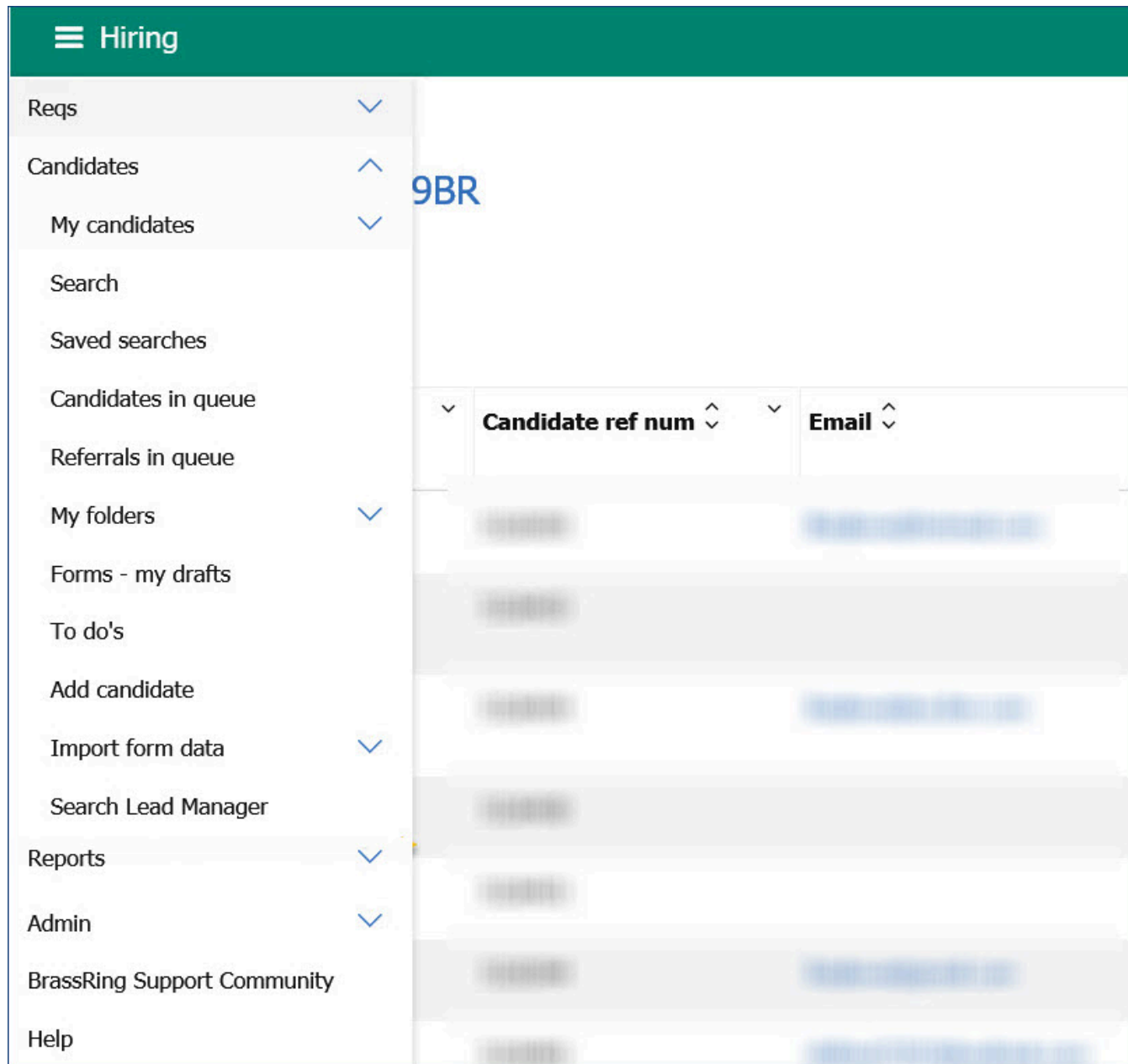
#### **Interview Manager - Removed from BrassRing Home Page Menu**

Starting this release, **Manage Interviews** is removed from the Candidates submenu of the hamburger menu in the **BrassRing home page**. The Interview manager module can be accessed from the home page tabs, or actions menu of the Talent Records.

Before this release.

The image shows a screenshot of the BrassRing Hiring application interface. On the left is a dark green sidebar menu with the title 'Hiring' and a hamburger icon. The menu items are: Reqs, Candidates, My candidates, Search, Saved searches, Candidates in queue, Referrals in queue, My folders, To do's, Add candidate, Import form data, Onboarding, **Manage Interviews** (highlighted with a red box), Reports, Admin, BrassRing Support Community, and Help. On the right, a blurred view of the main application area is visible, showing a search bar, a list of items with columns for 'Title' and 'Req Template', and navigation tabs for 'My Candidates', 'My Tasks (0)', and 'My Reqs Pending A'.

After this release.



RTC internal reference # 130632.

### Interview Manager - Response email Subject Enhancement

Interview coordinators work based on the automated email responses that are received from candidates or interviewers. Starting this release, the subject line of the automated responses is enhanced to ensure they are consistent and provide meaningful information to the coordinator. The following are the enhanced subject lines based on the type of automated response from either a candidate or an interviewer:

- Candidate responds confirming availability - **Availability received from candidate [candidatename] for Interview Request [ReqNumber-Title]**
- Candidate responds stating "None of these times work for me" - **Availability request declined by candidate [candidatename] for Interview Request [ReqNumber-Title]**
- Candidate accepts interview invitation - **Interview invitation accepted by candidate [candidatename] for [ReqNumber-Title]**

- Candidate declines interview invitation - **Interview invitation declined by candidate [candidatename] for [ReqNumber-Title]**
- Interviewer accepts interview invitation - **Interview invitation accepted by interviewer [interviewername] for [ReqNumber-Title]**
- Interviewer declines interview invitation - **Interview invitation declined by interviewer [interviewername] for [ReqNumber-Title]**

RTC internal reference # 128579.

### **Interview Manager - Completed Interview Enhancements**

Starting this release, completed interviews have the following enhancements based on the client feedback.

- The interview status is updated to "Complete" after the end time of the interview instead of the start time. This change allows room to reschedule the interview if it is a no-show after the start time of the interview.
- Add **Cancel** action to completed interviews. This addition allows coordinators to cancel the no-show interviews if required.
  - The Cancel option is allowed up to 48 hours after the end of interview end time. The 48-hour window provides time for communication between the interviewer and the interview coordinator.

RTC internal reference # 130625.

### **Interview Manager - Button and Label Changes**

Previously, while creating an interview using interview manager, the users used to see a Confirmation message with a **Done** in focus, which created a confusion. The confusion was because of the additional steps for the coordinator to take. To provide better user experience, this button's label is changed to **Close** and an extra preceding button is added with the label that depicts next possible action (for example: **Request candidate availability** or **Send invitations**).

The color coding and tab navigation on the page are updated so that the focus is shifted to the next action before moving to **Close**.

RTC internal reference # 128502.

### **Metrics Dashboard - New Date Filters**

Starting this release, the Metrics dashboard features the following new and extra date filters:

- Previous Month
- Year to Date
- Previous Week
- Previous Quarter

These new filters are added in addition to the existing filters Date Range and Days Back.

RTC internal reference # 129787.

### **Whitelist - Word Replacement**

Starting this release, across BrassRing, Workbench and the Talent Gateways, all the occurrences of the word whitelist are replaced with the word **allowedlist**.

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

### Alphanumeric Patterns

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

User input must:  Match a custom *sequence* of characters.

Only include characters from a **whitelist**.

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

### Alphanumeric Patterns

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

User input must:  Match a custom *sequence* of characters.

Only include characters from an **allowedlist**.

RTC internal reference # 130809.

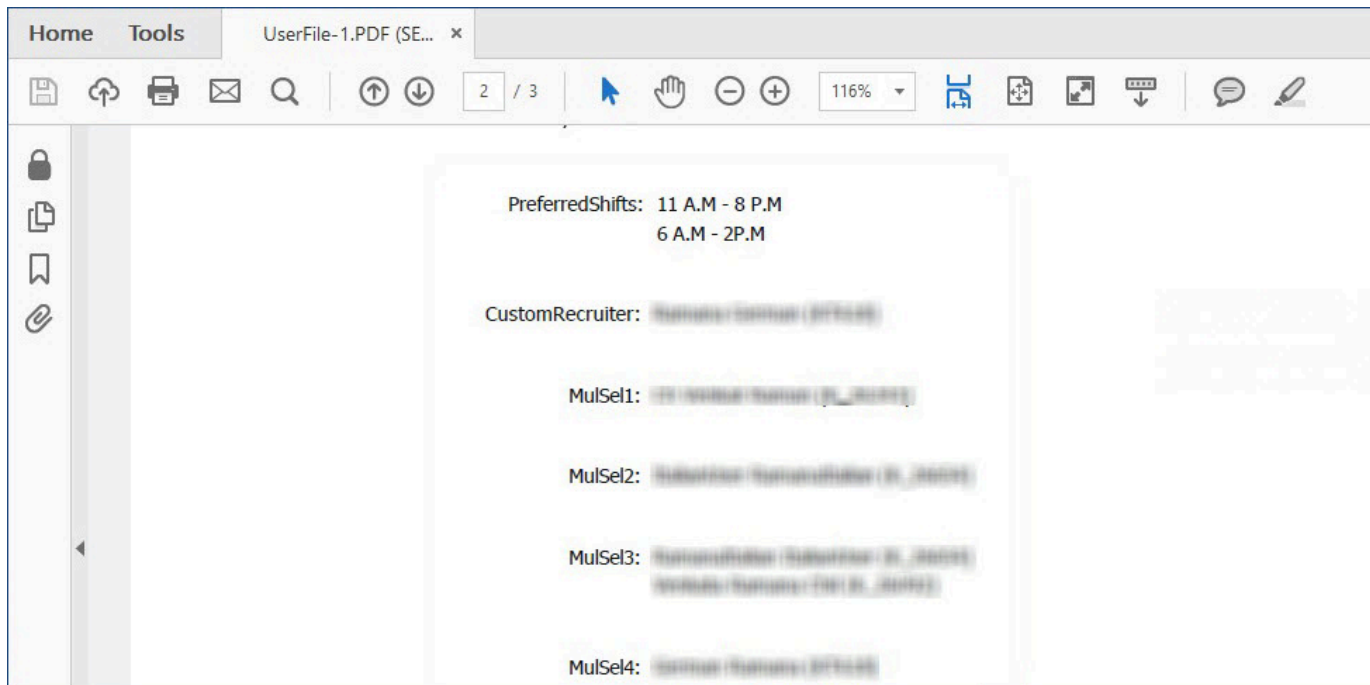
#### Candidate Forms - Form History PDF Layout

Previously, irrespective of the layout of the candidate form, the form history PDF displayed the fields in linear format. The PDF was not displaying the fields in the format that was configured for the form.

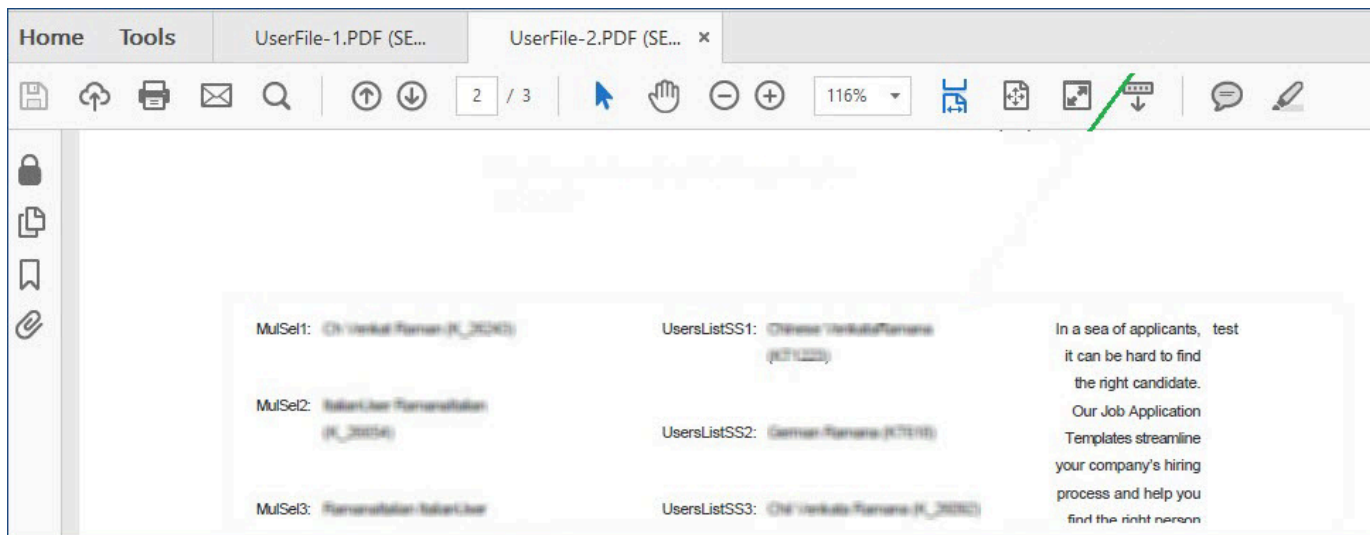
Starting this release, the layout of the PDF is fixed and the form history PDF retains the form layout that is configured for the form. The PDF displays the fields in the same format as configured for the form in Workbench.



Before this release.



After this release.



RTC internal reference # 129750.

### Talent Record - Talent Gateway Username Display for Account Bypass

BrassRing users with appropriate privileges can see the Talent Gateway usernames of candidates in the Talent Record. However, on the Talent Gateways with Skip Sign in enabled, a candidate can choose to bypass account creation. In such scenarios, the Talent Record displays the candidates' GUID (a number that is automatically created). Starting this release, instead of the number, users see a message if the candidate did not create an account on the Talent Gateway.

No usernames exist for this candidate. The candidate may have submitted through one of the following:

- A Basic Talent Gateway. (No username is required for a Basic Talent Gateway.)
- A Full Talent Gateway or Gateway Questionnaire that does not require a username.
- An SSO (Single-Sign-On) Talent Gateway.
- Manual résumé processing, such as mail, email attachment, or scanning.

RTC internal reference # 131130.

#### **Form eLinks - Enable Responsive User Interface**

Starting this release, responsive user interface is enabled for the req form and candidate form eLinks for all clients. All candidates and BrassRing users that access form eLinks by using laptop and desktop computers experience responsive user interface. This experience is already available to the candidates and users that access form eLinks by using mobile devices.

In order for this change to happen, the Workbench client setting **Display Responsive UI for eLinks** is set to yes for all clients. This setting is no longer available for changes after this release.

Refer to the [eLink Dashboard documentation](#) for a details about eLinks.

RTC internal reference # 131076.

#### **Talent Gateways - Basic Date Field Validations**

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. This behavior is changed starting this release. The date fields now display an error message **Please enter a valid date** when invalid date is entered. If an out of range date is provided, an appropriate error message is displayed.

RTC internal reference # 131400.

#### **Lead Manager - Update to Export**

Previously, when Lead Manager users exported information in the Lead Grids, all the information was being exported. Starting this release, only such information that is visible on the screen is exported. Only the latest information from the education, experience, and other fields is exported.

RTC internal reference # 130833.

## **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.

**There are no configurable changes during this release.**

## **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.

### **Forms - Date Field Validation**

**Note:** This feature was deployed to the Staging environment during the previous release. This feature is going to be available in Production environment this release.

Starting this release, date fields present in the candidate forms, req forms, and document subsidiary forms provide custom validation. The validation is available based on the new calendar configuration in Workbench.

When Workbench users edit **req form field attributes** in Workbench, a new Advanced Calendar configuration is available using which, the date field can be customized. The configuration of this field is not available for date fields of the Talent Gateway and Gateway Questionnaire forms. Now, the date fields available in the forms on Talent Gateways and Gateway Questionnaires can be edited by using the Basic Configuration available on the same page in Workbench. Date fields present in the Req form fields have only one type of configuration. The information icon displays a caution message that indicates the same when selected.

**Define field attributes** Audit Trail

**Field name** db\_date

**Advanced Calendar configuration** Configure

**Basic Calendar Settings**

Up years (from current year)  x

Down years (from current year)

Default Today's Date  Yes  No

Required for form creation from TG  Yes  No

Publish for use as autofill?  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 type="checkbox"/>

**Confirmation Settings**

Save Clear Cancel

Alert message on the Define Req Field Attributes page:

Define field attributes Audit Trail

Field name db\_date

**Advanced Calendar configuration** x

Advanced Calendar configuration is not currently supported by "Talent Gateway Candidate Apply and GQ workflows". You may continue to use the existing basic calendar settings to manage the calendar for these workflows.

**Basic Calendar Settings** 1

Up years (from current year)

Down years (from current year)

Default Today's Date  Yes  No

Required for form creation from TG  Yes  No

Publish for use as autofill?  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 type="checkbox"/>

**Confirmation Settings**

Save Clear Cancel

Calendar Configuration in the Define Req Field Attributes page:

**Define field attributes** [Audit Trail](#)

**Field name** db\_doj\_rk

**Calendar configuration**

**Search / Output**

**Searchable?**  Yes  No

**Outputable?**  Yes  No

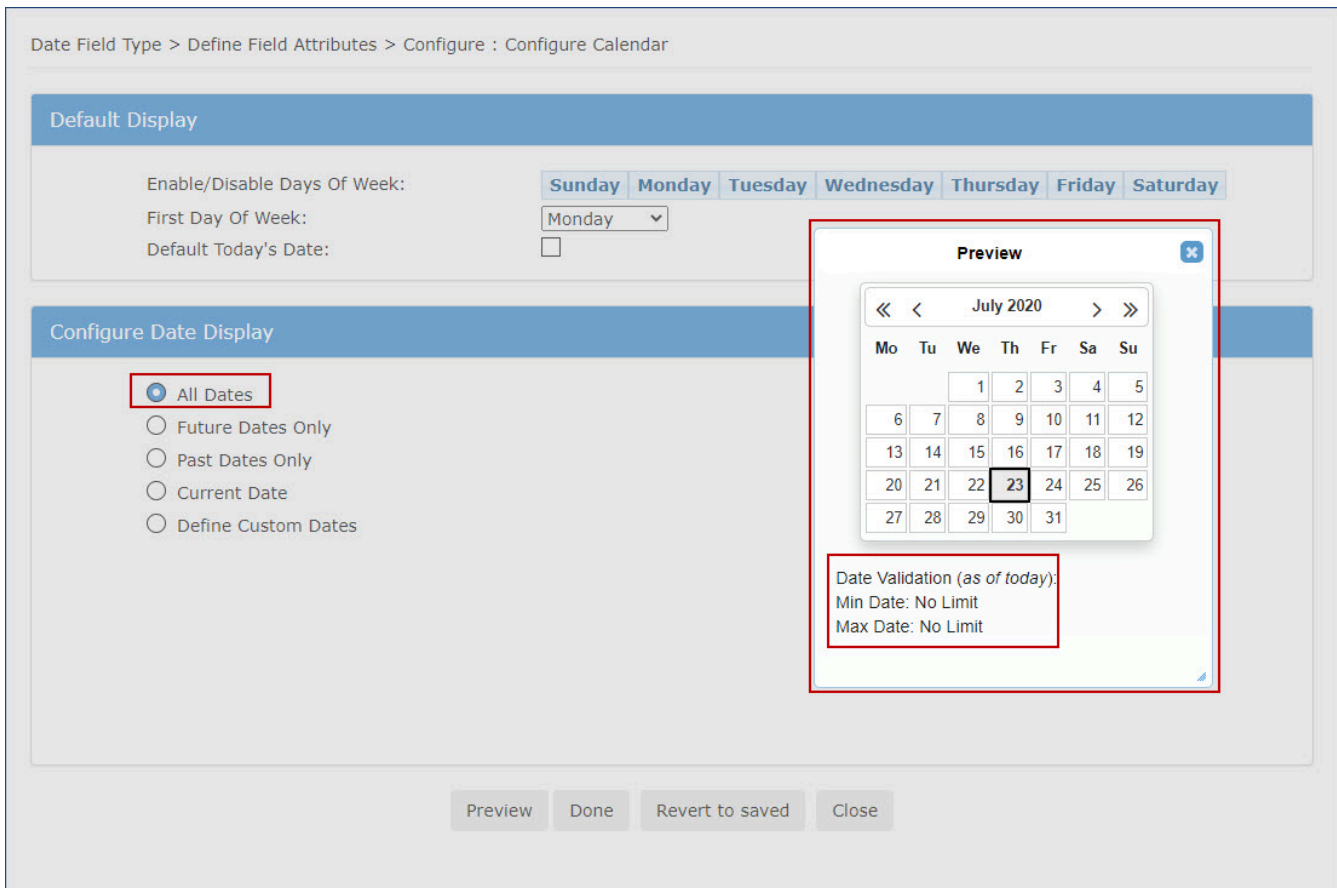
Used (DATE)	Available (DATE)	Enable Search & Output
0	75	<input type="checkbox"/>

**Field associations**

**Enable association**  Parent  Child

Display full list with default selection

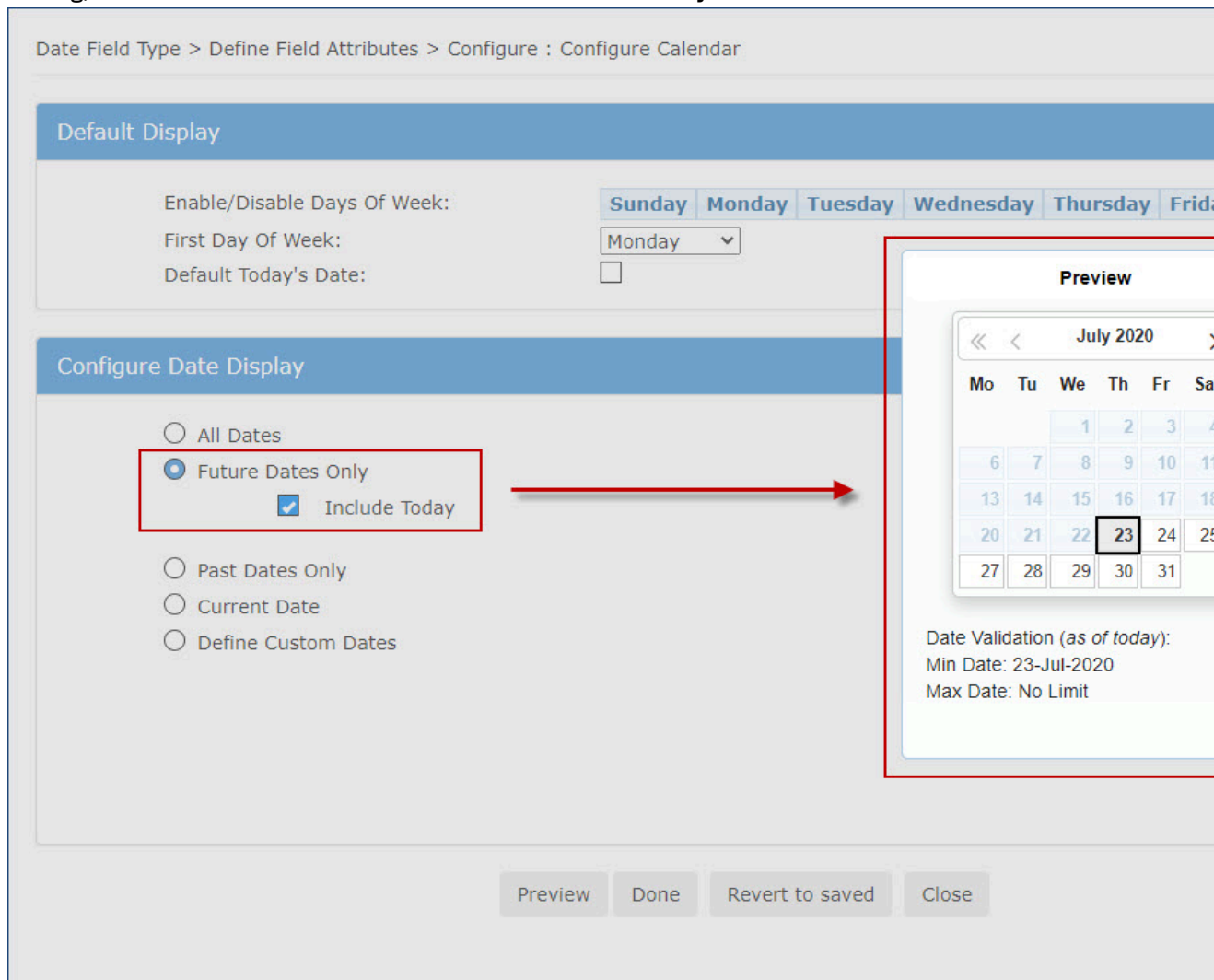
Selecting configure opens the new calendar configuration page.



Following are the features available in the calendar configuration:

- The Workbench administrators can preview the calendar based on the current configuration.
- One or more days can be enabled or disabled for the entire calendar. Disabled dates cannot be selected by the users.
- The day with which the calendar week starts can be configured.
- When the checkbox for the setting **Default Today's Date** is checked, when a user selects a date field, the current date is selected by default.

- The number of years, months, or days the calendar displays can be configured in the Configure Date Display section.
  - When the **All Dates** is selected, the full calendar is available in the date field of the form.
  - If the option **Future Dates Only** is selected, the date field displays only future dates. Within this setting, the current date is enabled based on the **Include Today's date** checkbox selection.



- If the option **Past Dates Only** is selected, the date field displays dates only from the past. Within this setting, the current date is enabled based on the **Include Today's date** checkbox selection.

- When users select **Current Date** along with one of the applicable options among Today, This week, This month, This year, the calendar displays appropriate part that is enabled.

Date Field Type > Define Field Attributes > Configure : Configure Calendar

### Default Display

Enable/Disable Days Of Week: **Sunday** **Monday** **Tuesday** **Wednesday** **Thursday** **Friday**

First Day Of Week: Sunday

Default Today's Date:

### Configure Date Display

All Dates

Future Dates Only

Past Dates Only

**Current Date**

Today  **This week**  This month  This year

Define Custom Dates

#### Preview

July 2020

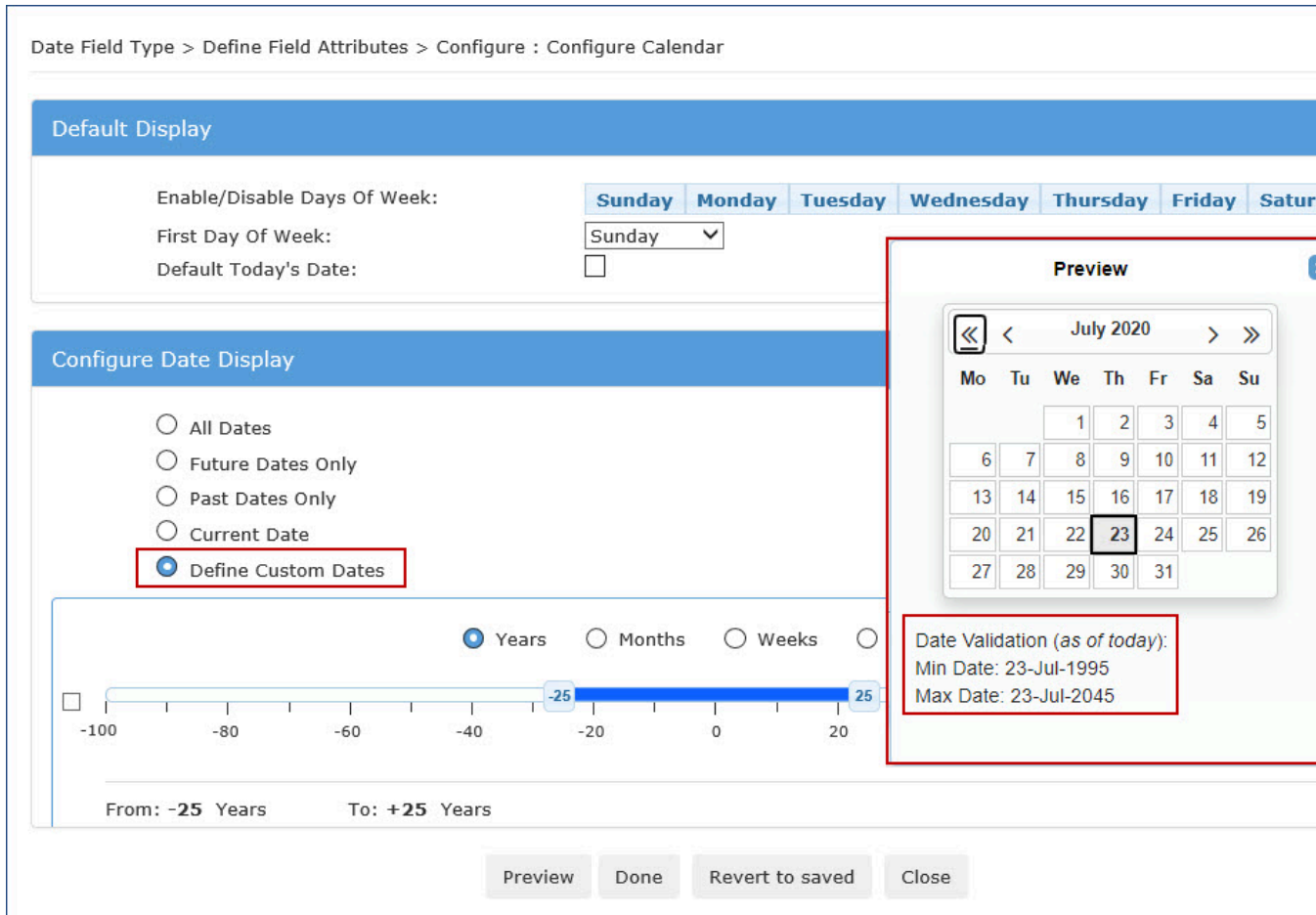
Su	Mo	Tu	We	Th	Fr
			1	2	3
5	6	7	8	9	10
12	13	14	15	16	17
19	20	21	22	<b>23</b>	24
26	27	28	29	30	31

Date Validation (as of today):  
Min Date: 19-Jul-2020  
Max Date: 25-Jul-2020

Preview Done Revert to saved Close



- When Workbench users select Define Custom Dates, they can use the progress bar to select a range of days, months, or years for the calendar to display. The preview displays the start date and end date of the calendar in the preview.



- Based on various configurations, Workbench users can ensure that the date fields validate the date that is entered by users based on various requirements.

RTC internal reference #126464.

### Codes Configuration - Moved from TG Details to Responsive Layout

The Codes configuration section that was previously located in the Talent Gateway Details section, is moved to the Responsive Layout configuration screen during this release. A new section **Codes** is appended to the list of sections in the **Responsive Layout Details** page. As a part of this move, the configuration options are displayed in an easy to use way.

In the new section, a table is displayed with Code types as rows and field labels as columns.

Preceding the table, a note is displayed stating *Note: manual section of codes is available (during apply) only if codes complex widget is configured for the posted responsive GQ and one or more of the following code types is set to display.* in italicized text. The setting Enable codes for manual selection is available with Yes or No options. This setting is by default set to No for a newly added Talent Gateway.

Following are some of the rules that are applied to the new code configuration section:

- The Codes section is available for all Responsive Talent Gateways and is not restricted to stand-alone Gateway Questionnaires or Talent Gateways with Disabled Sign in.
- If a Code type has no active codes, then all fields for this code type are hidden. A label text, "This Code Type has no active codes and cannot be configured at this time." is displayed as hover text for both the Automatic selection button and toggle.
- Fields are either enabled or disabled based on the configuration for the setting, "Enable codes for manual selection".

RTC internal reference # 117227,131183, 117227.

### **Rules Automation Manager (RAM) - Interview Manager Invitation Reminder**

Starting this release, a new Rules Automation Manager trigger is available to be used with Interview Manager. This trigger can be used to send reminders to candidates and interviewers that did not respond to the interview requests. This trigger helps the interview coordinator ensure that the rescheduling or cancellation can be done in time if required.

The RAM is designed to run for interviews with the statuses of "Invitation Sent", "Invitation Accepted - Candidate" or "Invitation Declined - Interviewer".

The following are the attributes for the new trigger:

- **Trigger Name** - Send reminders to candidates or interviewers for aging interview requests.
- **Trigger Type** - RAM Trigger.
- **Triggering Mechanism** - Interview Manager: No response from participants.
- **Select Trigger Event** - [Disabled - this field is marked as None or static value like: Interview Request Pending]
- **Timing Mechanism** - Two options, as following:
  - After interview request received
  - Before interview start.

Received is the default selection.

- **Trigger Timing (hrs)** - 48 hrs [two days in advance, default value can be changed].
- **Triggering Context:** Two options, as following:
  - Run across candidates only (with interview availability request or invitation).
  - Run across interviewers only (with interview invitation).

There is no default selection so that user selects the option consciously.

- **Select recipients** - Includes normal recipient options (Example "[Talent Record] email") as well as two new interview options: **[Interview Fields] Interviewer**, **[Interview Fields] Lead Coordinator**.

Recipients list is filtered based on the triggering context:

- If **candidates only** is selected, then interviewer is unavailable.
- If **interviewers only** is selected, then, candidate ("[Talent Record] email") is unavailable.

Communication templates that have Interview Manager tokens must be filtered out based on Correspondence table Attribute (denoting Interview Manager) for non-Interview Manager RAMs.

RTC internal reference # 128222.

## **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 **September 2020 release of Onboard**:

- US Staging - September 10, 2020
- US Production - September 19, 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.

### Talent Suite Font Change

As part of efforts to improve Talent Suite designs and the user experience, this release contains enhancement updates to improve the overall font style in use by the Talent Suite applications, with the adaption of the **IBM Plex** font family.

### W-4: Marital Status/Filing Status

In Onboard New Hire, the **marital status/filing status** field displays in the third step where new hires are selecting Exempt or Not Exempt.

If new hires select:

- **Not Exempt**, the marital status/filing status field displays as a required field.
- **Exempt**, the marital status/filing status field does not display.

Selection of Not Exempt in Withholding Elections:

Selection of Marital Status (required field):

### Manage New Hires: Documents Physically Examined Field

The **Documents Physically Examined** field is searchable/outputable in the **Manage New Hires** page for the button selected for documents physically inspected from I-9 Section 2 additional information.

The values are:

- **Yes** (if the button was selected).
- **No** (if the button was not selected).

This enhancement addresses the following business problem: Ability to execute a Manage New Hires filter where Additional Information contains COVID-19 and Documents Physically Examined equals No.

Onboarding managers can easily audit I-9s whose documents need to be physically examined per a COVID-19 I-9 process.

Name	Documents Physically Examined	Social Security Number	I9 Additional Information
BABEHKRSF, BABEHKRSF	Yes	00015E7E77F5C6631C87 881E80C2988710325391	Reopen Sec2 ID Sunil HM Docu physically exam
BFDJUVYCZ, BFDJUVYCZ	Yes	00015E7E77F5C6631C87 881E80C2988710325391	[06/18/2020 S Documents phy examined
Brody, Ivan	Yes	00015E7E24F5C84PF87 3883E79476C11930C78	[07/20/2020 IM Kumar Venkate Documents phy examined
CAEFBCBYT, CAEFBCBYT	Yes	00015E7E77F5C6631C87 881E80C2988710325391	[06/18/2020 S Documents phy examined
CFLSLCDB, CFLSLCDB	Yes	00015E7E77F5C6631C87 881E80C2988710325391	Form two [06/18 Sunil HM Docu physically exam [06/18/2020 S

### Manage New Hires: I9 Additional Information Field Enhancement

In **Onboard Manager**, on the **Manage New Hires** page, there is a field named **I9 Additional Information** that is searchable, exportable, reportable, and updatable. Users can update the Additional Information field for a completed I-9 Section 2.

With this release, **I-9 Section 3 approvers** can **add notes into the Additional Information field**.

- If the citizenship status changes, the I-9 is discarded and a new Section 1 and Section 2 are created. Nothing in the existing PDF is updated and Section 3 in the PDF is not generated.
- The additional information is appended along with the date and name of the user updating it.
- The signature in Section 2 doesn't need updating.
- Section 3 can be created and completed any number of times. During all these times, additional information can be updated.

I-9 Section 3\_ Standalone

Hire: YFRVKZEHE, YFRVKZEHE  
Business Consultant

Owner: HM

Due: Sep 9, 2020

Status: pending

1 2 3

**New Hire Information (Step 1 of 3)**

Reverification and Rehires

Fields marked with an asterisk (\*) are required.

Our records indicate the employee's I9 Section 1 citizenship status is currently Alien Authorized to Work.

Has the employee's citizenship status changed?

Yes

No

Is the employee a rehire?

Yes

No

**Additional Information**  
Use this field to notate any additional information regarding the employee's Form I-9 circumstances. You may leave this field blank if no additional notations are required.

## Configurable Changes

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

### Bulk Task Completion with Required Fields Completed

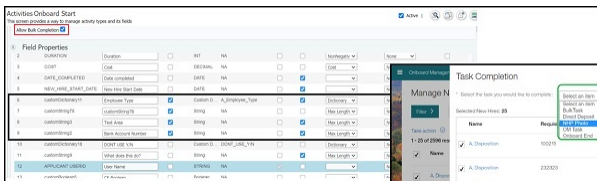
Onboarding managers can now **complete tasks with populated required fields for a group of new hires** simultaneously per requisition/job application. By doing so, they do not need to do them individually.

- Each bulk task is individually selectable from a menu.
- Access to this action is user-type driven.
- This task must be configured to be taken in bulk.

- In addition to the already existing functionality for templateless Onboard Start and Onboard End activities, tasks that allow data entry can be used.
- This task will complete if all required fields are populated.
- Tasks with null data in the required fields will fail.
- These actions are auditable (person, email, date, time, action taken, new hires associated).
- Users can complete tasks they are normally able to complete.

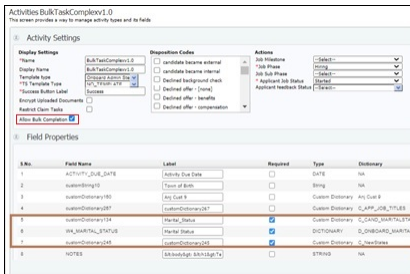
## PREVIOUSLY

If any activities were configured with required fields, that task was not listed in Bulk Actions for Task Completion.

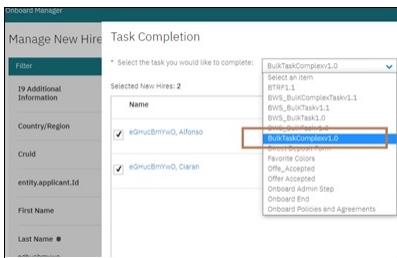


## WITH THIS RELEASE

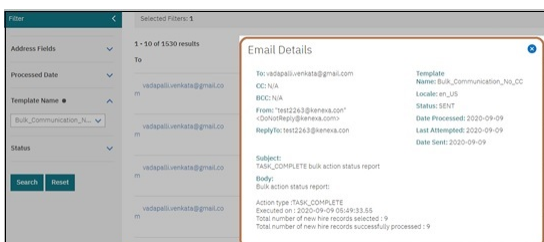
### Onboard Configuration:



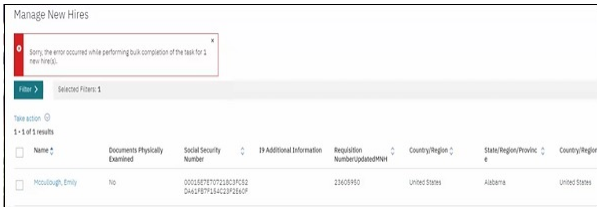
### Onboard Manager:



### Onboard Manager - Bulk Correspondence:



If the required field values is empty, validation still occurs and the task is not allowed to complete.



Use the **Manage Activity Fields** screen for configuration

### SSN: Disabling of Cut, Copy, and Paste Mouse Clicks

For the standard applicant **SSN** (Social Security Number) field, certain mouse clicks are now disabled.

### Onboard

The following screens are where **mouse right-click** & **cut** (CTRL+X), **copy** (CTRL+C) and **paste** (CTRL+V) are disabled for the standard applicant SSN field:

- I-9 Section 1
- I-9 Section 2
- I-9 Section 3
- W-4

New hires, when entering their SSN (single and/or field confirmation/validation), cannot cut, copy, or paste into or from either of the fields. All entries into both fields must be manual. Even for a single SSN field, paste is not permitted; the number must be manually entered. There is no cut/copy/paste for touch screens.

### Configuration

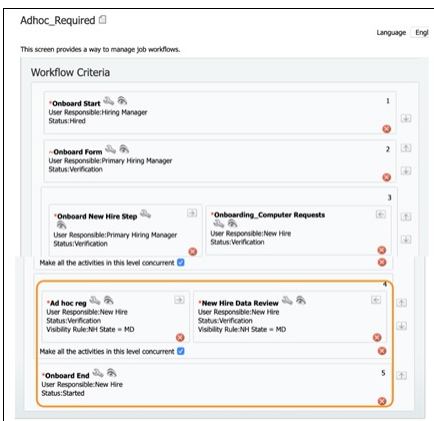
Clients can configure the standard applicant SSN field (Applicant. APPLICANT SOCIAL SECURITY NUMBER) in any other task or in the Personal Information screen via the Onboard Configuration application, in the **Manage Activity Fields** screen.

### Improvement: Condition-Based Adhoc-Required Activity

Previously, when the activity level just before the Onboard End activity level contained multiple activities and some of them were skipped because of conditions, completing one of the activities in that level (adhoc-required validation (M out of N check)) caused the condition check to be skipped whether the adhoc-required activity was completed or not. The Onboard End activity was being generated before the adhoc-required activity completion. As a workaround, clients could configure all the conditional activities from the level before Onboard End to a level before that level.

Now, the **adhoc-required validation** (M out of N check) is performed at the **level before Onboard End**. The system stops generating Onboard End without having HM-related adhoc steps completed. The workflow does not need modification.

Onboard Configuration:



## Onboard Manager:

Onboarding tasks				
Job Application: <b>Active Jobs</b>   Task Status: <b>All</b>   Due date range: <b>All</b>				
Task Title	Task Owner	Due Date	Status	Job
Onboard Start	Hiring Manager		completed	Adm
Onboard New Hire Step	manager, Hiring		completed	Adm
Onboarding_Computer Requests	adhoc, required		completed	Adm
Ad hoc reg	adhoc, required		completed	Adm
New Hire Data Review	adhoc, required		completed	Adm
Onboard End	adhoc, required		completed	Adm
Onboard Form	manager, Hiring		completed	Adm

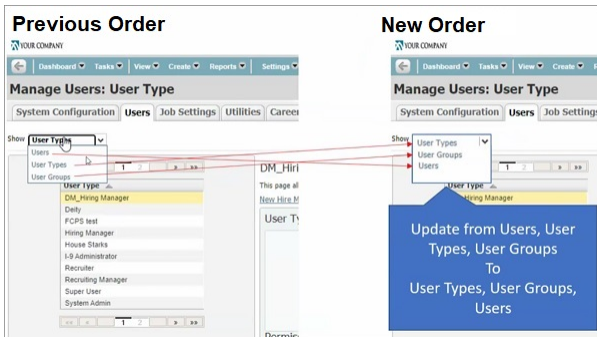
Use the **Manage Job Workflow** screen for configuration

### Manage Users User Type Screen: List Reordering

In the Onboard Configuration application, on the **Manage Users: User Type** screen, the selection list is reordered.

Previously, the order was: Users, User Types, User Groups.

Now, the order is: **User Types, User Groups, Users.**



## Fixed Defects

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

RTC Jazz Number	Defect Description
222360	TS002550426 - Remove two hires from Revalidation filter on the Manage New Hires page in Onboard (TS002734143).
232685	TS003255262 - Payment Method Election value selection issue (specific to IE/Edge browser).
233376	TS003321174 - Activity not presented on workflow (workaround advised).
237645	TS003824980 - Unable to locate newly created candidate via bypass in Manage New Hires page.
237847	ESCALATED - TS003853000 - E-Verify Audit - No results - Post June
238013	TS003843410 - Problem to include field in the report.
238026	TS003861654 - Gender - Field Drop-Down does not load appropriately.

<b>RTC Jazz Number</b>	<b>Defect Description</b>
238329	ESCALATED - TS003925683 - Field Branching issue - Required validation happening on hidden Multi Select Dictionary field.
238341	TS003924700 - Onboard Legacy Refresh Request.
238381	TS003931580 - Third Party Approver Notification.
238454	TS003936834 - Onboard US W4.
238490	TS003950358 - Instructional Message.
238885	TS004005229 - Missing reverification date.
238886	TS003996763 - Certain (EverifyCase) entity fields are causing an issue in reports.
238963	TS004021923 - Hawaii State form HW-4 formatting.
239016	TS004033259 - Section 3 not generating and missing date in Manage New Hires page.
239140	TS004043203 - Form mapping field not working.
239227	TS004059993 - I-9 Section 3 not available automatically per process.



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