SilkRoad Onboarding
Release Notes
2014.3.0
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Overview

The SilkRoad team is excited to announce the release of a new version of SilkRoad Onboarding, formerly called RedCarpet. This release provides new features, enhancements to existing functionality as well as resolutions to known issues intended to improve the scalability, usability, and performance of the application. This document is designed to familiarize you with the latest release and provide details about various changes you can expect to see.

Early adopters and upgrade process

A release is made available to customers approximately one month prior to the start of the quarter (for example. December 1st, March 1st, June 1st, and September 1st). Customers are automatically upgraded to this release the middle of the first month of the quarter (approximately 45 days later). The period between the release availability and the automatic upgrade is considered the early adopter stage. Customers interested in being an early adopter can contact SilkRoad Support to be upgraded.

What it means to be an early adopter:

- You will receive the release without having to wait the approximate 45 days until all customers are upgraded.
- You should report any issues (bugs) to the support team (please be patient though; they are learning how to support the new version).
- You should understand this is not the same as beta testing where we can change new features based on your feedback.
- We may call on you to learn how you are using the new version and why you wanted to take advantage of it.
- Note: You are signing up to be an early adopter for this version only. You will need to request to be an early adopter for each version at the time of each release.

What happens if you choose not to be an early adopter:

- All SilkRoad customers will be automatically upgraded following the early adopter period. No action is required from you to initiate this process. A follow-up email will be sent to you one week before your site is scheduled to be updated.
- For those customers with dedicated staging sites, SilkRoad will begin to update your staging sites with the new release; it may take several days to complete all sites.

New features

SilkRoad Onboarding version 2014.3 provides a number of new features as listed below.

RedCarpet Is Now Called SilkRoad Onboarding
(Red-4561)

Based on feedback from customers and industry leaders, SilkRoad is changing the names for all our Life Suite modules in an effort to make each module name clearly identify its function. As of this 2014.3 release, RedCarpet will now be called SilkRoad Onboarding. You will notice a logo change in the user interface immediately, while references to RedCarpet are being phased out over subsequent releases. Customers of other Life Suite modules will see similar changes in those products in upcoming releases as well. In addition, "life events" will now be referred to as "work events" throughout the online help.
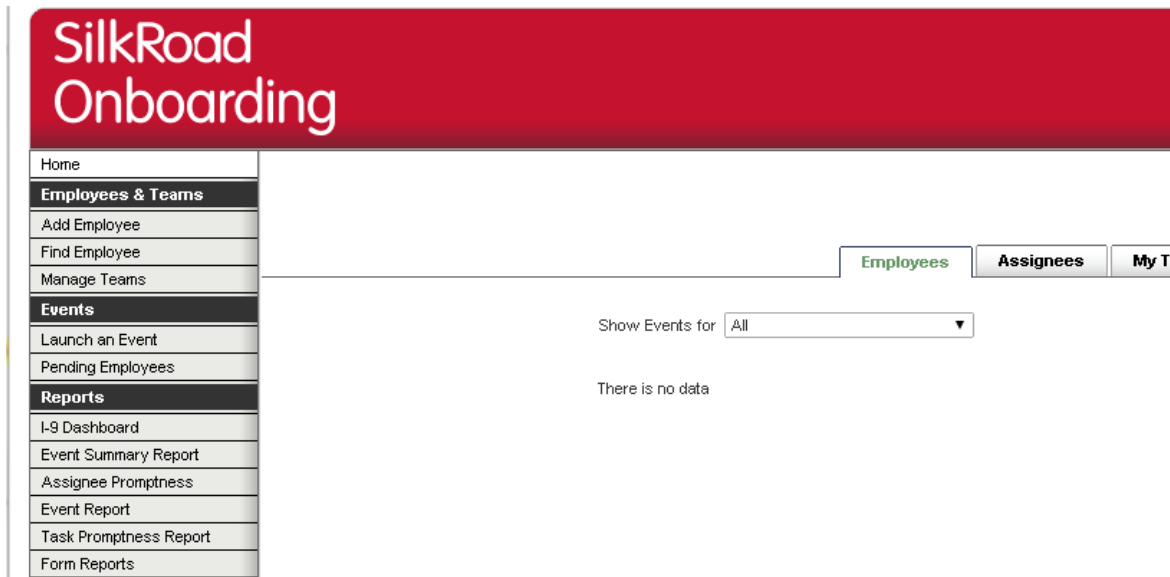
Employee Report (Red-4464)

The Employee report is used by administrators who want to review employees that are supporting SilkRoad Onboarding events. It helps determine what the employees have access to, what teams they are associated with, and what their areas of responsibility are.

The Employee report will only return data for which the administrator has permission to see. It is accessible from the Reports menu in the UI.

The advanced search functionality allows for searches on employees by their key properties, teams and categories, and associated events. Negative searches can be performed along with the ability to include retired employees. By using the various search functions available and downloading the results to Excel or XML for analysis, users can find all the information they need about all their employees in the system.

The XML and Excel output (data columns) are based on your configuration and if the employees selected have event data. Here are just a few examples of the data returned in the download:

- First, Middle, Last Name
- Login ID
- User GUID
- Authentication Type
- Email
- Employee profile fields
- Key Properties
- Teams, and if the employee is a member or controller

Note: there is a limitation to the number of records that can be downloaded from SilkRoad Onboarding; if more than 1000 records are expected, users are advised to narrow their search criteria.

Data Segmentation Preparation (Red-4464)

The Data Segmentation Preparation page is designed to assist users who want to set up and use the Data Segmentation feature, which was released in version 2014.2. The new report allows users to quickly evaluate the readiness of a SilkRoad Onboarding configuration for enabling data segmentation by showing which users in the system have the data segmentation key property and assignment categories identified and which do not.

Any user who has the Manage Data Segmentation permission will see the Data Segmentation Preparation link on the Manage Key Properties page. By clicking on this link, the user will be prompted to select the Data Segmentation category to request a summary report, which summarizes all Active and Retired users and which users have the key property and assignment category set.

By clicking on the results, users can drill down into more detail in order to make the needed adjustments to employees in the system. Until all the employees have the required prerequisite of the data segmentation key property set, the page will display this message: "Data segmentation cannot be enabled at this time."

Data Segmentation Preparation

In order to configure data segmentation, a key property must be selected as criteria to segment the data. This page will assist in determining the readiness for enabling data segmentation based on the key property selected. Only those categories that have been configured as key properties are available to check the readiness of selection. Use the Key Properties page to update the key properties.

Data Segmentation category: Current Department ▼

Submit

	Active Employees	Retired Employees
Total	18	1
Key Property not set	17	1
Assignment Category set	0	0

Data Segmentation cannot be enabled at this time

Once all the employees have the data segmentation pre-requisite (all employees must have a key property assigned for the data segmentation key property), data segmentation can be enabled on the key property page.

Manage Key Properties

Categories	Specify the list of category aliases that will be part of the minimum set of common key properties for all employees in RedCarpet. You may also specify that any of these are required or not. To enable Data Segmentation, it is required that you first select ONE required category as the data segmentation category. The Data Segmentation Preparation summary can be used to evaluate if the employee data is ready for data segmentation to be enabled using a given key property.

Category Name	Alias Name	Display Order	Required	Data Segmentation	Delete
Department	Current Department	1	☐	☐	☐
Job	Current Job	2	☐	☐	☐
Location	Current Work Location	3	☐	☐	☐
Add Category		Update Categories			

Export/Import Event Definitions (Red-4442)

On behalf of a customer, SilkRoad services personnel can export an event and all its tasks and dependencies from a staging (test) environment and import it into a production environment for deployment purposes. Customers will now be able to make adjustments to new events and workflows in their test environments and then SilkRoad services can move the tested event to production during deployment so that the customer will not have to recreate the event or task definitions in production.

For customers working through an implementation currently, to use this feature, please contact support at Support@SilkRoad.com and ask for the event you would like exported to production.

Export Task Definitions (Red-4441)

SilkRoad Onboarding 2014.3 includes an option to export task definitions to a csv file. The export option is available to reference (or compare) task definitions outside the SilkRoad Onboarding user interface. Any user who has the Manage Task Definition privilege can go to manage Events in the Administration menu and utilize this new feature. A new button called Export Tasks has been added to the page. Clicking on this button next to an event in the list will download all the associated task information to a .csv file, which can then be opened in Excel.

Events List

Event Name	Action	
I-9 & E-Verify	Edit Tasks	Export Tasks
I-9 Reverification	Edit Tasks	Export Tasks
Onboarding	Edit Tasks	Export Tasks

All of the task attributes are output. **Just a few examples** of the data returned in the download are:

- Task Name
- Associated Event Name
- Associated Event Code
- Task Instructions
- Is Self Completing (True/False)
- Due Date
- Task Activation Date
- Is Due Date Based on Activation Date (True/False)
- Send Warning Notification (True/False)
- Send Overdue Notification (True/False)
- Restrict Reassignment To Event Coordinator (True/False)

Improvements

Minor updates and improvements to existing functionality are listed in this section.

Portal Studio Fluid Design (Red-3879)

A SilkRoad Onboarding Portal Studio template is available for a customer's event portal to use fluid css. The new template content on the page and the menu options resize and move in a fluid fashion down and to the left when the browser is reduced in size on a tablet or phone.

If you are interesting in upgrading your existing event portal to the new fluid format, please contact support at Support@SilkRoad.com.

New Default for Attaching an eForm on New Tasks (Red-4321)

To improve usability, the default will no longer be read-only when attaching an eForm in the task definition. Note: existing eForms on tasks will not be affected.

Resolved issues

The following issues have been resolved in this release. These issues may not affect all customers. Issues are sorted in numerical order by Support case tracking ID.

If additional information is required, please contact Support and reference the ID #'s displayed.

Tracking ID	Support Case	Description
Red-3996	00506086	Unable to open a new browser session in a new tab
Red-4258	00518656	Link to form not working in IE9 and IE11 with compatibility mode turned off
Red-4584		User interface change for consistency with the SilkRoad Life Suite. "Life Events" and "Life Cycle Event" references are now "Work Event"
Red-1605		Re-verification configuration change: validation error now appears if an administrator attempts to retire the re-verification event coordinator
Red-4767		Self-completing task failure due to database deadlocks caused by concurrency load
Red-4635		Change in behavior: Default on creating a new task definition, the due date now defaults to be relative to the event effective date (instead of the creation date)
Red-4680		Correction to GetFormsIDsEx for a customer receiving an intermittent '0' error
Red-4037		Improvement to Details section of Employee Task List page: Category names with a lot of characters will now wrap
Red-4668		Scroll bar not showing on pop-ups in Firefox
Red-4123		Internal change to accommodate customers with a large number of notes

Supported browsers

SilkRoad Onboarding is designed to provide browser-neutral service delivery. It is recommended that customers use modern browsers, as we make every attempt to support the latest versions of the following browsers.

Browser	Version
Internet Explorer *(not compatibility mode)*	8, 9, 10, 11
Mozilla FireFox	*latest
Google Chrome	*latest
Apple Safari	*latest

Our overall strategy is to maintain active browser support based on client and new hire demand. Regardless of formal browser support we will always troubleshoot and work to correct issues impacting users.

Mobile device support

SilkRoad views mobile device support as an important capability to our applications and we continue to add functionality that is optimized for tablet devices. As we enhance SilkRoad Onboarding, we continue to assess the needs of employees being onboarded or going through work events as they pertain to mobile devices.

With the SilkRoad Onboarding default skin in the portal studio, tablets and similar devices can be used for viewing tasks and other portal content. Although the interface can be rendered on a tablet, some content and functions available may not be completely functional.

Supported languages

SilkRoad Onboarding is designed to support multiple languages for ease of use by employees and administrators. SilkRoad Onboarding version 2014.3 includes the following supported languages:

Supported Languages	Portal	SilkRoad Onboarding User Interface
Chinese (Simplified)	Yes	Yes
Chinese (Traditional)	Yes	No
Danish (DA-DK)	Yes	No
English (US - EN)	Yes	Yes
French	Yes	Yes
French - Canadian	Yes	Yes
German (DE)	Yes	Yes
Greek	Yes	No
Italian (IT)	Yes	No
Japanese (JA)	Yes	Yes
Korean (KO)	Yes	Yes
Polish (PL)	Yes	No
Portuguese - Brazilian (BR)	Yes	Yes
Russian (RU)	Yes	No
Slovak (SK)	Yes	No
Spanish (Universal)	Yes	Yes
Swedish (SV-SE)	Yes	No

Technical support

For technical assistance for any of our solutions, contact our support staff at:

- **Phone:** US Toll Free: 1-866-803-9663
- **International Toll Free**: Access numbers via support.silkroad.com
- **Web:** support.silkroad.com
- **Email:** support@silkroad.com