



## **SilkRoad Life Suite**

Release Notes

2015.1

November 2014

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## Overview

The SilkRoad team is excited to announce the 2015.1 Life Suite release. To aid our customers with multiple products, release information for all SilkRoad modules will be conveniently combined moving forward. The Life Suite 2015.1 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 SilkRoad Life Suite. The 2015.1 release contains updates to the following applications: Recruiting, Onboarding, Performance, Learning, Talent Portal, and Life Suite Platform. This document is designed to familiarize you with the latest release offerings and provide details about various changes you can expect to see. Utilize the table of contents to easily navigate to the modules of interest.

As discussed previously in our last RedCarpet release, as well as all user communities for each product, SilkRoad has updated the branding of all Life Suite modules. After receiving feedback from users and industry leaders, SilkRoad has changed the names of all Life Suite modules in an effort to make each module clearly identified by its main function. As a result, you will notice a logo change in the user interface to reflect this updated naming. This is purely a branding update for SilkRoad, as no functionality has been removed as a result of the branding change.

## Early adopters and upgrade process

For customers taking advantage of our Onboarding, Performance, Learning, and HRMS modules, a release is made available to customers approximately one month prior to the start of the quarter. 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 approximately 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. Only early adopters within the initial 45 day window will receive specific upgrade dates. If you are concerned about having a specific date, please reach out to SilkRoad Support to become an early adopter.

- For those customers with dedicated staging sites, SilkRoad will begin to update your staging sites with the new release right away, though it may take several days to complete all sites.

## **SilkRoad Recruiting upgrade process**

Differing from the Life Suite upgrade and early adoption process outlined above, ALL SilkRoad Recruiting customers will continue to receive production upgrades at the same date and time. No scheduling is required on your part. The 2015.1 release is slated to be deployed to all SilkRoad Recruiting customers on Saturday, November 15<sup>th</sup> during the extended maintenance window of 12 am – 8 am EST. The 2015.1 staging upgrade is slated to occur on November 5<sup>th</sup>. All SilkRoad Recruiting customer administrators will receive an email confirming that the staging environment has been upgraded.

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## Life Suite Platform

This release notes section is for the Life Suite Platform – what was previously released as Talent Portal, Connect and Authentication. Future releases will be bundled as the Life Suite Platform with documentation merging from each individual product as appropriate.

### New features

The Life Suite Platform version 2015.1 provides a number of new features as listed below.

#### Authentication

##### Life Suite Authentication customizable error message

The Life Suite Authentication administrative user interface provides the ability to present a customer specific error block within any Authentication error page. This allows the customer to provide instructions to the end user who has received the error.

Work with a SilkRoad Support or Service Representative to configure this feature.

##### Automated metadata updates

For customers who have provided a URL for their federation metadata, Life Suite Authentication will now automatically reload their metadata file on a nightly basis. This will ensure any changes to the customer's metadata are understood by Life Suite Authentication and reduce the possibility of authentication issues due to unreported changes in the federation.

##### Support for multiple URLs associated with an application

With this release, Life Suite Authentication now supports multiple application URLs. This allows for a set signed URL host-headers based upon the customer name (lifesuitecode) and any additional URL host-headers requested by a customer. Work with a SilkRoad Support or Service Representative to configure this feature for use with multiple URLs per Life Suite module.

##### Local logout when SLO end-point is not provided

In certain scenarios, a customer is unable to provide end-points for proper Single Log-out (SLO) function in conjunction with their Single Sign-on. Life Suite Authentication will now proceed with user logout even in the absence of the SLO end-points and either redirect them to the default Goodbye page or to a URL specified in a "reply" query string variable.

## Integration Platform (Connect)

### All employees to SilkRoad Recruiting

The Life Suite Integration Platform will now send all employees to SilkRoad Recruiting. Prior to the 2015.1 release, only employees with an OHRole value of 'Recruiter', 'Recruiting Manager', 'Hiring Manager' and 'Administrator' were sent to SilkRoad Recruiting. Inside the SilkRoad Recruiting user interface, administrators have the option of granting necessary permissions to designate the user as an approver. It is important to note that any change to the role for the employee should be done in the SilkRoad Recruiting application. Any change made to the role of an existing employee received by the Integration Platform, will not update the role membership in SilkRoad Recruiting.

### Support for multiple onboarding events

The Life Suite Integration Platform now supports multiple onboarding events. In the case of inbound new hire files to the Integration Platform, a new column is now supported – newhireeventid. This column can optionally include an Onboarding event ID (see Onboarding Localization page for more information on the necessary event IDs) to specify the appropriate onboarding event for the new hire represented by the row. If no value is supplied, the Integration Platform will use the default new hire event.

The Integration Platform also supports extracting new hires from multiple onboarding events. Multiple events can be specified through the use of a comma separated list of event IDs. The Integration Platform will extract any new hire with any one of the specified "trigger" forms complete in any event specified.

The Integration Platform no longer requires a list of forms to extract for a new hire from the Onboarding module. All completed forms are extracted at the time of the new hire extraction. It is important to note that it is still necessary to have a completed Life Suite Onboarding Form (any of the three – US, International, or ADP) completed for the new hire to be created within the Integration Platform. Work with a SilkRoad Support or Service Representative to configure this feature.

## Improvements

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

### Authentication

#### Talent Portal as default authentication portal

In situations where it is unclear where to direct an authenticated user, Life Suite Authentication provides a portal page with links/buttons to access enabled Life Suite modules. Life Suite Authentication also provides the ability to configure a different target in these scenarios.

With the release of 2015.1, Life Suite Authentication will automatically configure to route users to the Talent Portal when the Talent Portal is enabled. This setting can be overwritten by a SilkRoad support or services representative.

## Improved authentication error message

In a single sign-on scenario, it is possible for a user to successfully authenticate and be recognized by Life Suite Authentication but not to exist in the target Life Suite module. Prior to the 2015.1 release, the error message related to this scenario was more cryptic and left the user unsure if there was an authentication issue, system issue, or access issue. For 2015.1, the message returned to the user by Life Suite authentication has been improved to make it clear that the authentication process was successful but they can't be identified in their target Life Suite module.

The 2015.1 release of Life Suite Authentication also updates the error message related to an authentication failure by an external IDP. The new message makes it clear that the issue is with the IDP and provides any details from the IDP. This will help reduce confusion as to where an authentication issue might reside.

## Integration Platform (Connect)

### Enhancements to standard ADP-WFN integration

Several enhancements have been made to the standardized bi-direction integration with ADP Workforce Now (WFN).

To purchase and configure the standardized integration with ADP-WFN, contact your SilkRoad Support or Service representative (Note: There are typically ADP costs and configuration associated with this integration).

### Full Time Equivalent field

The field, FTE (full time equivalent) has been added to the ADP Life Suite Onboarding Form and is passed as part of the ADP-WFN integration. The value can range from 0.00 to 1.00.

### Direct deposit data for new hire in Onboarding

The 2015.1 release of the Life Suite Integration Platform includes defined mappings for a new hire ADP Direct Deposit form from Onboarding to ADP Workforce Now. This requires download and use of the ADP Direct Deposit Form in the Onboarding Forms Library. The form must be completed prior to completion of the designated "trigger" form. The mapping of the form to ADP-WFN is as follows:

eForm Field Name	ADP Field Name	Note
<b>Bankdeposittransitaba1</b>	bankdeposittransitaba	
<b>Bankdepositaccountnumber1</b>	bankdepositaccountnumber	
<b>Bankdepositdeductionamount1</b>	bankdepositdeductionamount	
<b>Bankfulldepositflag1</b>	bankfulldepositflag	true/false
<b>Bankdepositdeductioncode1</b>	bankdepositdeductioncode	
<b>Bankdepositprenotecode</b>	bankdepositprenotecode	'O' for override, 'N' for none (default)
<b>Bankdepositprenotedate</b>	bankdepositprenotedate	mm/dd/yyyy

Up to four direct deposit accounts are supported with the eForm number incrementing appropriately (e.g. bankdeposittransitaba2) and the export row to ADP increasing by one. One and only one account must have the bankfulldepositflag set to true. The prenote override fields, if needed, are only exposed to a non-new hire – typically through a second task assigned to an HR or Payroll Administrator prior to completion of the eForm.

See the *ADP Workforce Now Data Mapping Guide* for more information.

### Emergency contact data for new hire in Onboarding

The 2015.1 release of the Life Suite Integration Platform includes defined mappings for a new hire emergency contact form from Onboarding to ADP Workforce Now. This requires download and use of the Employee Emergency Contact Form in the Onboarding Forms Library. The form must be completed prior to completion of the designated “trigger” form. The mapping of the form to ADP-WFN is as follows:

eForm Field Name	ADP Field Name	Note
<b>Emergency1ContactFullName</b>	contactname	Full Contact Name
<b>Emergency1Line1</b>	contactaddressline1	
<b>Emergency1Line2</b>	contactaddressline2	
<b>Emergency1City</b>	contactcity	
<b>Emergency1State</b>	contactstate	US and Canada Only
<b>Emergency1Zip</b>	contactzipcode	
<b>Emergency1Country</b>	contactcountry	
<b>Emergency1HomeNumber</b>	contacthomephonedialnumber	
<b>Emergency1MobilePhone</b>	contactcellphonedialnumber	
<b>Emergency1WorkPhone</b>	contactworkphonedialnumber	
<b>Emergency1WorkExtension</b>	contactworkphoneextension	
<b>Emergency1Relationship</b>	contactrelationship	Customer defined
<b>Emergency1Email</b>	contactemail	

Up to three emergency contacts are supported with the eForm number incrementing appropriately (e.g. Emergency2Email) and the export row to ADP increasing by one. See the *ADP Workforce Now Data Mapping Guide* for more information.

### Manager Relationship

With the 2015.1 release, the Integration Platform will handle the necessary mapping with ADP-WFN for the manager relationship. The Integration Platform will use the ADP specific fields of PositionID and ReportsToPositionID to allow ADP-WFN to specify the ManagerHRISID (manager relationship) for an employee. Similarly, when sending a new employee to ADP-WFN from SilkRoad’s Onboarding, the Manager specified on the event will be mapped to the corresponding ReportsToPositionID for ADP-WFN. See the *ADP Workforce Now Data Mapping Guide* for more information.

### WorkedLocalTaxCode in Basic Text Export

The basic text export for the Life Suite Integration Platform now includes a data field, WorkedLocalTaxCode, to indicate the applicable local tax code selected by a new hire in the Onboarding module. If no code is selected by the new hire then no value will be entered in this field.

## Resolved issues

The following issues have been resolved in this release.

Tracking ID	Support Case	Description
IIDEV-523		ListApplications Web service to retrieve a list of all applications configured for Life Suite Authentication does not return Recruiting even when enabled for Authentication. <i>Resolution: Web service now filters to include Recruiting interface.</i>
IIDEV-512		Claims sample data no longer displaying in Authentication Admin UI. <i>Resolution: Fixed to include sample IDP data in claims information.</i>
IIDEV-485		Issues displaying multiple IDPs in the 2014.2 Authentication Admin UI. <i>Resolution: Fixed when migrating to 2014.3</i>
BUS-2816		A blank EmployeeType in Life Suite Platform is sent as blank to Performance. There is no use-case for a blank EmployeeType in Performance and in some cases, employees won't appear in reports as a result. <i>Resolution: A blank value in Life Suite Platform is sent as 'internal' to Performance.</i>
BUS-2800, HB-2643		Place of birth not being passed to HeartBeat from Life Suite Onboarding Form <i>Resolution: Fixed.</i>
BUS-2070, BUS-1964, BUS-2771		Onboarding and Performance: When the ManagerHRISID is removed (set to null) the Current Manager Key property or manager relationship is not updated. <i>Resolution: Fixed.</i>
BUS-2267, PE-24308		Updates to Dept/Org in HeartBeat are not updated in Learning until an employee is updated – Learning only accepts updates via employees. <i>Resolution: Fixed.</i>
BUS-2891		Failure to add worker in HeartBeat from Onboarding if selecting an email type other than 'Personal', 'Alternate Personal' or 'Other' on the Life Suite Onboarding form. <i>Resolution: Only send HeartBeat the email address value if the type is 'Personal', 'Alternate Personal' or 'Other'.</i>
BUS-2890, PE-31221		Failure to add worker in HeartBeat from Onboarding if selecting "Use Work Address from Location" <i>Resolution: Fixed.</i>
BUS-2835, PE-30467, PE-30519		WingSpan DataConnect TempFolder showing setting for staging even while in production. <i>Resolution: Fixed.</i>
BUS-2815		Connect incorrectly validates date fields as being GREATER than 1/1/1900. <i>Resolution: Fix validation to be greater than or equal to.</i>

## Known issues

The following issues remain unresolved in this release. Until they are resolved, use the suggested workaround or avoid them as noted.

Issue	ID	Workaround
Employees who are set as “Managers” in HeartBeat do not get transferred as managers to other apps.	BUS-1840	Manually update in Life Suite applications

# Talent Portal

## New features

SilkRoad Talent Portal version 2015.1 provides a number of new features as listed below.

### SilkRoad module integration

To assist users with a one-stop landing page to access SilkRoad modules, we are now providing a simple integration to the SilkRoad modules through the Talent Portal. The Talent Portal will now determine if a SilkRoad module is enabled through Single Sign On and if the user logged in should have access to different areas of each module.

Minimal configuration is required which will make turning on and off the SilkRoad modules easier to set up.

If you are interested in the Talent Portal solution or would like your current Talent Portal solution upgraded to include this integration, please contact SilkRoad Support.



### Talent Management Tiles - Recruiting

With the SilkRoad Talent Portal, manage all your talent needs from one convenient landing page. Talent Portal can now determine if the user logged into Talent Portal is allowed access to SilkRoad Recruiting. It will then display the SilkRoad Recruiting tile to the user. User roles that will have access to the Recruiting tile will be – Recruiters, Recruiting Managers, Hiring Managers, Administrators, and Executive Report users.

This will allow one place for your designated users to quickly login to the SilkRoad Recruiting application to manage their recruiting needs, and as an administrator, you will have complete control as to whether a user has access to see and access the product.



## Talent Management Tiles - Internal Job Postings

To provide convenient access to internal job postings, the Talent Portal will now display a tile for your SilkRoad Internal Job Portal. This will need to be configured in SilkRoad Recruiting to allow the Job Postings tile to appear and point to the correct Internal Job portal.

There is a small configuration that will need to be set up by SilkRoad for this feature. If you have attempted to configure the Internal Job portal to appear on the Talent Portal and you are not seeing the tile, contact SilkRoad Support to make sure the configuration on the Talent Portal side is set up correctly.

If you have already set up your Internal Job Postings portal, the tile should continue to function as it was originally set-up. In this case though, you may not control it from the OpenHire application. Contact SilkRoad Support for the new integration to be configured properly.

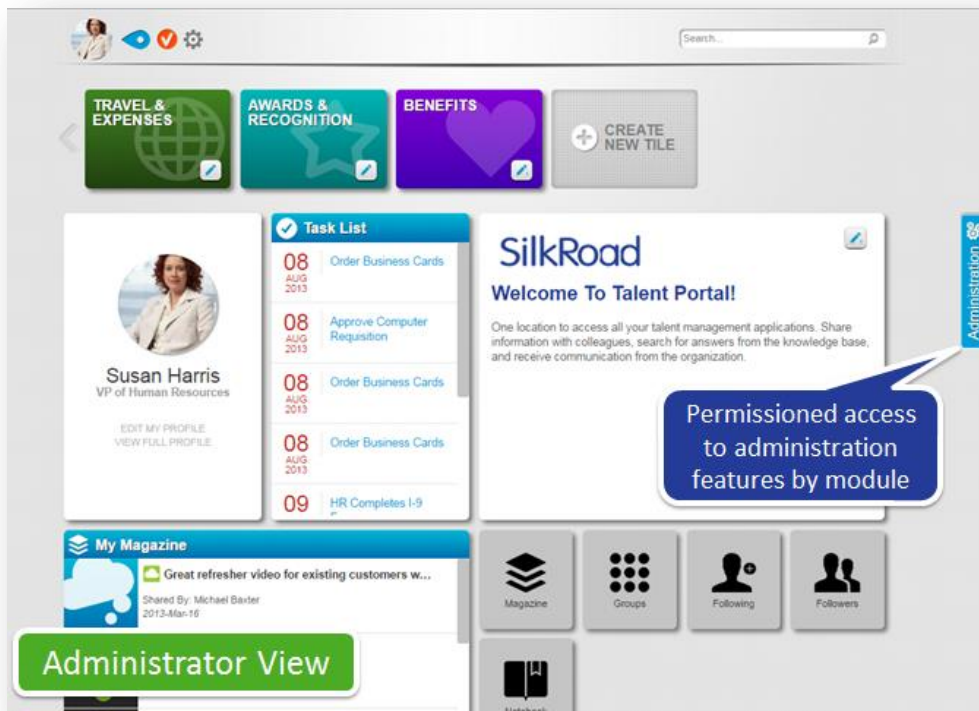
If your Internal Job portal title does not fit on the Talent Portal tile, contact SilkRoad Support to update your SilkRoad Recruiting internal portal name to an appropriate size. We are unable to give a character limit due to unknown line breaks.



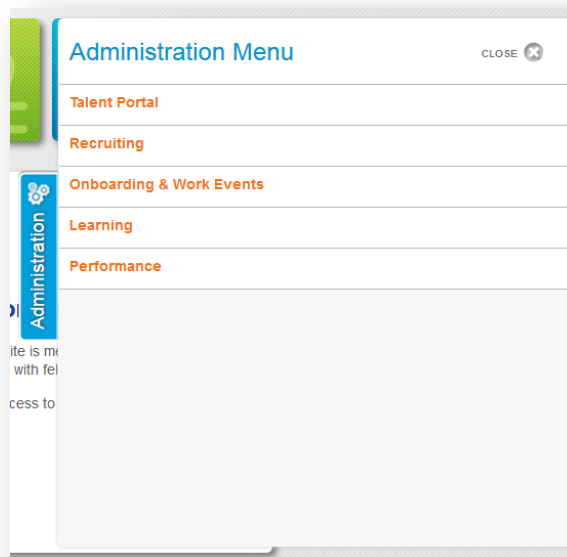
## Administration Panel Integration – Recruiting

Recruiting is now available through the Administration Panel in Talent Portal.

The administration panel will provide easy access for administrators to quickly access the desired SilkRoad modules they wish to manage. This panel will determine if the module is enabled and if the user logged into the Talent Portal is allowed access to the administration areas of each module. If the user has access to any of the SilkRoad modules, the administration tab will appear in the Talent Portal.



Selecting the administration tab will present the administration menu with quick links to navigate into each module based on the user's permissions. The SilkRoad Recruiting administration menu option will be presented to users recognized as SilkRoad Recruiting Administrators and Recruiting Managers.



## Resolved issues

The following issue has been resolved in this release.

Tracking ID	Description
N/A	Emailer links aren't https. May have caused issues in some browsers. <i>Resolution: All links are now https.</i>
N/A	IE11 and iPad: Group Share a Thought box is larger than expected. <i>Resolution: Fixed.</i>

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## Talent App Exchange

Talent App Exchange is a SilkRoad program that aims to build a universe of interconnected, mutually complimentary, best-in-class talent management solutions centered around the SilkRoad Life Suite. This program provides SilkRoad customers with unprecedented opportunities to explore complementary software offerings and build a solution uniquely fit to their needs. SilkRoad is continually working to expand our network of Talent Apps partners and bring more interesting and innovative opportunities to our customers' attention.

Talent Apps are available to customers in the following categories:

- Analytics
- Assessments and Surveys
- Background Screening
- Benefits and Compensation
- Content
- Employee Referrals
- Job Distribution
- Payroll
- Tax Credit Services
- Time and Attendance/PTO
- Video Interviewing

Access the Talent App Exchange on the SilkRoad website at:

<http://www.silkroad.com/Partners/Overview.html>. If interested in exploring partner functionality, please contact your SilkRoad Account Representative for further assistance.

# SilkRoad Recruiting

OpenHire is now SilkRoad Recruiting! Based on feedback from users and industry leaders, SilkRoad has changed the names of all Life Suite modules to make each module's name clearly identify its function. This is purely a branding update for SilkRoad. Changes you can expect to see throughout the application and communication are:

- New logos throughout the application
- Logo may have been removed
- References of OpenHire replaced with SilkRoad Recruiting or Recruiting
- Updated user manuals
- LinkedIn User Groups will reflect new product name
- Documentation created by our customers may need to be updated with the new branding

## New features

SilkRoad Recruiting version 2015.1 provides a number of new features.

### Configurable Columns & Saved Searches

When SilkRoad Recruiting rolled out the Recruiting Teams feature in a prior release, we envisioned designing the new Jobs search page as the go-to search feature to allow users to do more from one page. To grant this convenience, we have continued building out the Jobs search page and are happy to announce the new features of Configurable Columns and Saved Searches.

The screenshot shows the 'My Open Jobs' search interface. It includes a 'Filters' section with 'Status: Open', 'Assignees: Recruiting Manager', and 'Sort By: Posting Date (newest to oldest)'. There are buttons for 'Save Search As' and 'Edit Search', and a '4 Records Found' indicator. Below the filters are tabs for 'Basic Searches' and 'My Searches', and a 'Columns' button. The main table lists job titles, tracking codes, resumes, review requests, interview requests, locations, and job statuses.

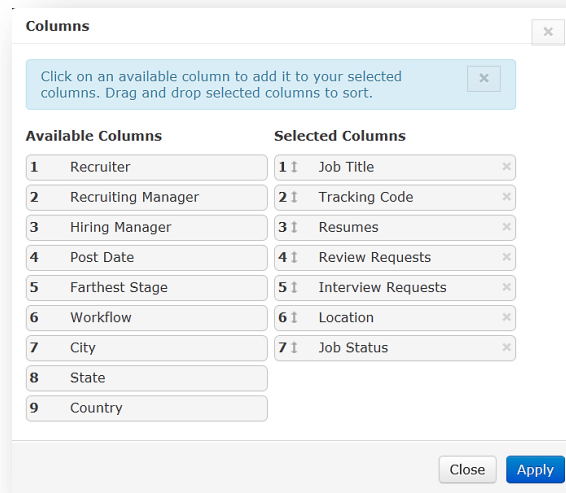
Job Title	Tracking Code	Resumes	Review Requests	Interview Requests	Location	Job Status
Account Executive	217351-052	1	0 / 0	0 / 0	Jacksonville	Normal - Int./Ext. Applicants
Admin. Assistant	217334-052	0	0 / 0	0 / 0	Jacksonville	Normal - Int./Ext. Applicants
Accounts Receivable Coord.	217332-052	2	0 / 0	0 / 0	Kennewick	Normal - Int./Ext. Applicants
Admin. Assistant	217329-052	0	0 / 0	0 / 0	Jacksonville	Normal - Int./Ext. Applicants

When Recruiting Teams functionality is enabled, Recruiting Users can access the 'Jobs' page and will be able to define their search criteria within the filters area and save the search within their 'My Searches.' Saving searches will provide users an easy way to return to where they left off quickly without having to redefine search filters again. In addition, users can configure their column view based upon their individual recruiting needs and this view will be maintained with all their searches accessed via the 'Jobs' page.

Three default Basic Searches are provided and cannot be deleted.

- Jobs - All jobs that the user has access to view whether through assignment or location permission
- My Open Jobs - All open jobs that are assigned to the user as either a recruiting user or team member
- My Filled Jobs - All jobs that have at least 1 candidate residing in the hired hiring stage that were assigned in some capacity to the recruiting user.

Configurable Columns available:



Keep in mind the Jobs search page is only available when the Recruiting Teams feature is enabled. If you're currently not taking advantage of this feature and would like to, have your site Administrator contact SilkRoad Support to have the feature enabled for you.

## Approval Workflows

Creating requisitions and offer approvals are often times generated by team members that are not necessarily familiar or aware of the proper approval chain and workflow. SilkRoad Recruiting takes the guessing out of this dilemma by providing 'Approval Workflows' for Job Templates or on the fly approval creation. By defining an approval workflow at the job template level, it will allow users to quickly and easily route requisitions and offers for approval with the approvers being populated automatically.

Users with access to the Administration > Job Templates area can:

- Search users or groups that have been denoted with requisition and/or offer approver permissions
- Select Up to 10 approvers for each approval workflow type
- Arrange the order of approvers

**Requisition Approvers**

2 / 10 Remove All

- 1 | Recruiting Manager x
- 2 | Recruiting2 Manager x

---

**Offer Approvers**

1 / 10 Remove All

- 1 | Recruiting Manager x

When a user creates a new requisition using a job template with a defined approval workflow, the approval details page will automatically populate the approvers and in the order that has been established on that template. The approval workflow can be adjusted by adding or deleting approvers, as well as changing the order prior to routing the requisition for approval. The approval workflow defaults to 'Review in Sequence' but can be removed in the event a specific approval sequence is not necessary.

**Requisition Approvals** [Return to Manage Requisitions](#)  
Account Executive ()

**Requisition Approval Settings** Save Cancel

Assign up to 10 approvers for the requisition. When reviewing in sequence, sort the approvers using the drag and drop vertical arrows.

Approvers Remove All

- 1 | Recruiting Manager x
- 2 | Recruiting2 Manager x

Administrator Recruiting Manager

Review In Sequence

Send Approval Emails

Approver	Email Sent	Date Responded	Status	Last Updated	Notes/Comments
<span>Action</span> Recruiting Manager			Email Not Sent	10/23/14	
<span>Action</span> Recruiting2 Manager			Pending Prior Approval	10/23/14	

The same functionality occurs with candidate Offer Approvals as well. When a user generates a candidate offer for a position created using a job template and a predefined approval workflow, the approval details page will automatically populate those approvers from the template. The approvers will default to 'Review In Sequence' in the order that was defined on the job template however can be adjusted prior to routing the offer for approval.

**Offer Approvals** [Return to Job Offers](#)  
Christie Test - Account Executive (217351-052)

**Offer Approval Settings** Save Cancel

Assign up to 10 approvers for the offer. When reviewing in sequence, sort the approvers using the drag and drop vertical arrows.

Approvers Remove All

- 1 | Recruiting Manager x

Administrator Recruiting Manager

Review In Sequence

Send Approval Emails

Approver	Email Sent	Date Responded	Status	Last Updated	Notes/Comments
<span>Action</span> Recruiting Manager			Email Not Sent	10/23/14	

If you have not associated an Approval Workflow to your job template, you still have the flexibility to start typing in your desired Approval Workflow group name on the fly on the Approvers page. This process will quickly pre-populate your desired approvers. **NOTE:** The Approval Management feature must be enabled to take advantage of approval workflows. If you are currently not using the Approval Management feature, contact Support to have it enabled.

## My Groups

With the addition of Approval Groups, Administrator and Recruiting Manager users can now create Requisition and Offer Approval Groups from their My Account > My Groups page that are automatically shared. These groups can be searched and selected when defining Job Template approval workflows as well as when creating requisition and offer approvals on the fly.

Groups <span style="float: right;"><a href="#">Add Group</a></span>				
Name	Members	Shared	Type	Actions
Offer Approval Group 1	2	Yes	Offer Approval	Edit   Delete
Recruiting Team #2	29	No	Recruiting Team	Edit   Delete
Requisition Approval Group	7	Yes	Requisition Approval	Edit   Delete

## Improvements

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

### Review Request

Recruiting users sending out candidate Review Requests will see an improved type ahead search filter for the Available Internal Recipients field. By typing two letters, you'll receive a list of results that include active Users and Recruiting Team groups. The Review Request feature enhancements are:

- Type ahead search
- Select individual users or Recruiting Team groups
- Add up to 50 internal reviewers

**Request a Review**  
**Compose Email**

Request that the following candidate(s) be reviewed for the **Account Executive - Bioscience - MI (217335-052)** position: **James Smith**

**Subject:**

**Available Internal Recipients:**

3 / 50 Remove All

**External Recipients:**

Multiple recipients? Use a ";", Mark@silkrroad.com ; Terry@silkrroad.com

## Requisition/Offer Approvals default in sequence

Generally with approval workflows, the routing and approval process needs to flow in a particular order. With the Approval Management feature enabled, we have updated the Requisition and Offer approval details pages to default new approvals to 'In Sequence'. In the event a workflow sequence is not necessary, the check box can be deselected prior to saving the approval.

**Offer Approvals** [Return to Job Offers](#)  
Christie Test - Account Executive (217351-052)

**Offer Approval Settings**

Assign up to 10 approvers for the offer. When reviewing in sequence, sort the approvers using the drag and drop vertical arrows.

**Approvers**  Remove All  
 1 / 10

**Administrator**   
 **Review In Sequence**  
 **Send Approval Emails**

Approver	Email Sent	Date Responded	Status	Last Updated	Notes/Comments
<input type="button" value="Action"/> Recruiting Manager			Email Not Sent	10/23/14	

## Additional career site languages supported

SilkRoad Recruiting now supports four new additional career site languages: Finnish, Norwegian, Hungarian, and Bulgarian.

## Candidate Withdraw

A major part of the SilkRoad Recruiting experience is to ensure candidates are able to apply for jobs easily and withdraw themselves from consideration in the event they no longer want to be considered for a position. Several updates have been made to the Candidate Withdraw option user experience to clarify the action the candidate is performing:

1. In the Candidate Submittal History area, the legacy Withdraw button has been removed and a prominent red X added to the left side of the jobs the candidate has applied to.

2. Upon clicking the red X, the pop-up warning message has updated verbiage alerting the candidate to the action they are about to perform.
3. Once the candidate clicks OK, the job the candidate withdrew from has a strikethrough as a visual indicator they are no longer being considered for that job.
4. A new system email notification is sent to the assigned Recruiter for that job advising them the candidate no longer wishes to be considered for that particular job.

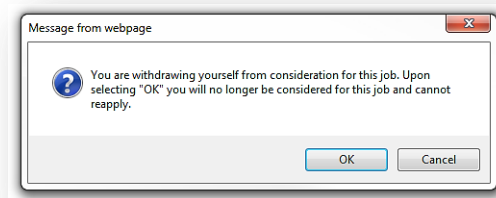
**Current résumé/CV Profiles**

**My Profile**    [Edit Profile](#) [Change Password](#) [Logout](#)  
**Christie Candidate**  
 222 New Address

Jacksonville, Florida 32255 United States  
[christie.candidate@silkroad.com](mailto:christie.candidate@silkroad.com)  
 Primary Phone 904.555.5555  
 Secondary Phone 904.555.5555

**Submittal History**  
 You may view and edit each résumé/CV profile you previously submitted by clicking the View résumé/CV link.  
[Return To Job Listings](#)

Date Submitted	Job Posting	Current Stage
7/21/2014	Account Executive(217336-052)	<a href="#">View résumé/CV</a>
<del>8/27/2014</del>	<del>Accountant(217340-052)</del>	<del><a href="#">View résumé/CV</a></del>



## Candidate level of education

A new selection 'Master's Degree' has been added to the Candidate level of education field. This will allow candidates to provide a more specific education level when applying to job openings. Recruiter users will then be able to perform a Candidate Advanced search on the specific education level they need.

## Race/Ethnicity selections

Based upon the EEOC/OFCCP FAQ, there is a preferred method in the display of the Race/Ethnicity selections candidates can choose for the question "What is your race/ethnicity". We have updated the format of these race/ethnicity options to reflect the preferred format. As shown below, the option to select Hispanic or Latino is presented first and all other selections follow.

**What is your race/ethnicity? \***

Hispanic or Latino  
A person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.

If not then, I am:

White (Not Hispanic or Latino)  
A person having origins in any of the original peoples of Europe, North Africa, or the Middle East.

Black or African American (Not Hispanic or Latino)  
A person having origins in any of the Black racial groups of Africa.

Asian (Not Hispanic or Latino)  
A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.

Native Hawaiian or Other Pacific Islander (Not Hispanic or Latino)  
A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

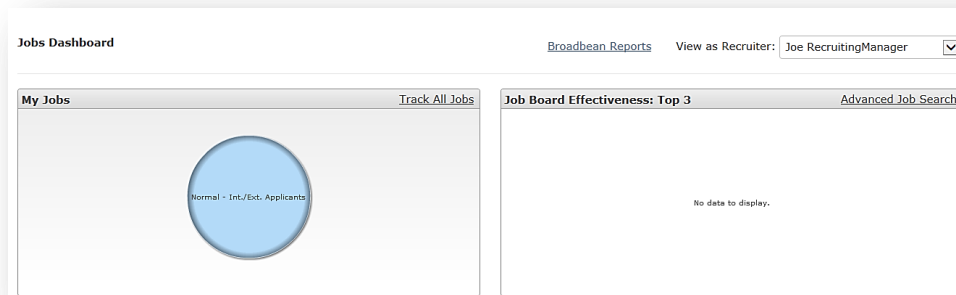
American Indian or Alaskan Native (Not Hispanic or Latino)  
A person having origins in any of the original peoples of North America and South America (including Central America), and who maintains tribal affiliation or community attachment.

Two or more (Not Hispanic or Latino)  
A person who identifies with more than one of the above six races.

I choose not to self identify

## Broadbean links to AdCourier

Companies that have activated the Broadbean posting feature can now quickly navigate to the Broadbean AdCourier stand-alone application via a new Broadbean Reports link on the Jobs Dashboard. This will allow the users to utilize the various reports Broadbean has available in AdCourier for job posting metrics.



Also, a **Manage Broadbean Postings** link has been added to the Manage Jobs page for Broadbean users to quickly access the Broadbean AdCourier stand-alone app to view and take action on any of the jobs they have posted via Broadbean.

## New job distribution partner – Jobing.com

SilkRoad Recruiting continues to build new partnerships and provide our customers with additional free job distribution channels to help increase the number of qualified applicants and decrease job advertising costs. We are excited to announce our latest US based free job distribution partner, Jobing.com.

As with SilkRoad Recruiting's other job distribution partners, our clients' externally posted jobs will be included in Jobing.com's listings. This integration will allow SilkRoad customers to continue to expand their reach across the US of both active and passive job seekers increasing visibility at no additional charge.

**NOTE:** All customers are opted in automatically to our free job distribution partnerships. If you wish to opt out of this free job distribution channel, please have your SilkRoad Recruiting Administrator email [support@silkroad.com](mailto:support@silkroad.com) with the words "Jobing.com opt out" in your subject line.

## Tiny MCE rich text editor

The rich text editor used in various areas of the Recruiting application is a 3<sup>rd</sup> party add-in called Tiny MCE. This feature has been upgraded with their latest version and certain changes are reflected with this upgrade. The following options are no longer provided with the latest version:

- Paste From Word
- Edit CSS Style
- Insert/Edit Attributes

## External career site city search filter

Customers with an international presence often attract candidates that need to be able to search for jobs that are not necessarily location or region specific. Candidates need to instead search by a specific city to find positions in their desired area. SilkRoad Recruiting provides a new external career portal configuration for a city search field. This field functions as an 'and' in relation to other search fields, with the expectation of entering just 1 city at a time into the free text box. This field is disabled by default, therefore customers interested in adding this new search filter to their career portal should contact SilkRoad Support requesting to have the configuration enabled.



The screenshot shows a search filter configuration interface. At the top, it is titled "Filter by Location" and includes "Select All" and "Deselect All" links. Below this is a dropdown menu with options: "All Locations", "United States", and "Spain". The next section is titled "State/Province/Region" and also includes "Select All" and "Deselect All" links. Below this is a dropdown menu with options: "All Locations", "Alabama", "Arizona", "California", and "Colorado". Below the dropdowns is a text input field labeled "City" with an arrow pointing to it. At the bottom of the form is a "Perform Search" button.

## Resolved issues

The following issues have been resolved in this release. These issues may not have affected all customers. Issues are sorted in numerical order by Support case tracking ID. If additional information is required, contact SilkRoad Support and reference the ID #'s displayed.

**Resolved issue highlights include:**

**Item:** 226198 / OH-10347

**Title of Item:** Edit Job Related custom fields data length

When internal Support/Services team members attempted to update job related custom fields, this would cause errors if the field data length was decreased.

**Item:** 347921 / OH-17277

**Title of Item:** Internal Job Title and Posted Job Title Fields character limit error

The requisition form allowed users to create Internal and Posted Job Titles without character limits however the same fields on the Manage Jobs > Create Job Posting did have limits therefore causing errors.

**Item:** 497891 / OH-22716

**Title of Item:** Job Posting notification sending duplicate emails for candidate eForm completion

Candidates completing eForms sent via CCE would cause duplicate emails to be sent to the user in the 'Replies To' field on the job posting.

**Item:** 498297 / OH-22378

**Title of Item:** Create Job Posting caused error message

Periodically users would receive an error message when attempting to create a job posting.

**Item:** 501183 / OH-23715

**Title of Item:** My Reports (multiple reports) – User locations was reaching a reporting character limitation

Users with an extensive amount of locations associated to their profile, experienced an issue with reports reaching a maximum character limit therefore reporting data was truncated.

**Item:** OH-22755

**Title of Item:** Show REPOST button to all Broadbean Users once job posting has expired from all boards

The REPOST button will now show for ALL Broadbean users once the job post is no longer active on any job board. This will allow any user to re-post the job now, rather than just the original poster of the job.

Additional issues also resolved with this release.

Tracking ID	Support Case	Description
<a href="#">OH-10347</a>	226198	Edit Job related custom fields will not change data length
<a href="#">OH-13197</a>	318960	Location code reverting to template location code
<a href="#">OH-17277</a>	347921	Character limit for "Internal JobTitle and Posted Job Title" field only when editing a Job Posting
<a href="#">OH-22716</a>	497891	Duplicate "Online résumé/CV Submission for <Job and tracking code>" Notification Email after email

		submit
<a href="#"><u>OH-22378</u></a>	498297	Error message when trying to create a Job posting
<a href="#"><u>OH-21628</u></a>	517960	Requisition Approval Email - Missing Custom Fields in "Copy of Email sent to approver" email
<a href="#"><u>OH-20992</u></a>	520219	Work Authorization incorrect default
<a href="#"><u>OH-21762</u></a>	529108	Update text in the new user activation email to be applicable to employee role
<a href="#"><u>OH-23160</u></a>	530747	Advanced Search "Keywords, Resume, & Comments" not working
<a href="#"><u>OH-22721</u></a>	534433	Fail Flag Discrepancy between Recruiting team resume pages and Old View OH Pages
<a href="#"><u>OH-23240</u></a>	538808	Custom fields - date format incorrect in approver email
<a href="#"><u>OH-22581</u></a>	538808	Custom fields- out of order on the approver email
<a href="#"><u>OH-23479</u></a>	547066	External Career portal Existing Resumes- EEO/OFCCP values inserted into EEO Profile
<a href="#"><u>OH-23257</u></a>	548526	Location of 'Job Tracking-Closed' Report in Job Closing Message.
<a href="#"><u>OH-22947</u></a>	549248	Temp Unavailable Error when Clicking all Job Titles
<a href="#"><u>OH-23258</u></a>	551447	OH - eForm Completion email displays the OH Company name instead of the Job Title for the position
<a href="#"><u>OH-23540</u></a>	558352	Report Builder timeout
<a href="#"><u>OH-24115</u></a>	571977	Error Opening Candidate Profile

## Upcoming changes

### Online browser

Due to browser versions and 3<sup>rd</sup> party job boards continually evolving, SilkRoad Recruiting will be retiring the Online browser feature 'Resources'. This feature is managed via Administration, Manage Resources 'Add an ONLINE Resource'. When a resource of a previously supported site was selected and a user added, the left navigation menu item would appear. This feature is no longer supported by many browsers or job boards, therefore is unusable today.

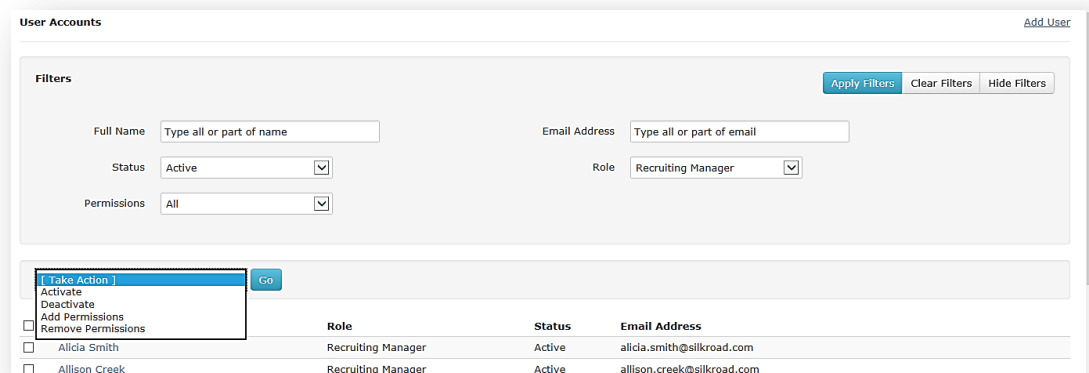
Customers that currently display this left navigation menu item 'Resources' with Internet Explorer will no longer have this option available with our v2015.2.0 release tentatively slated for a March 2015 deployment date. We are dedicated to researching and defining a new, more flexible candidate resume import feature that will allow us to grow and evolve with modern browsers and job boards.



## Approval Management

In our v2014.1.0 March 2014 release, we introduced the new Approval Management feature providing customers a self-service feature to define Offer and Requisition approvers in their application. This feature was designed to allow users with access to the Administration>User Accounts area to update and maintain their approvers at their own discretion and convenience, as well as reduce the interaction and dependency on SilkRoad Support to import new approvers and updates.

To date, we have continued supporting both the legacy approver import process using the excel spreadsheet and the new Approval Management feature. In March 2015, we will no longer support the legacy import process using the excel spreadsheet and all customers will need to move to the new Approval Management feature to define approvers. Customers that are not currently using the new Approval Management feature will need to create ATS users for approvers that are not currently in your system. If you have a large number of users that need to be imported, Support can assist you with uploading these users in bulk. Fill out this [spreadsheet](#), submit a case request to our Support team and request to 'Import Employees'. Once the users have been setup in your system, requisition and offer approval permissions can be denoted on a user by user basis or updated in mass in the Administration > User Accounts area.



Once you have all your Users established as approvers in your system, contact Support requesting to enable the Approval Management feature.

**NOTE:** Enabling the new Approval Management does not interfere with requisitions or offer approvals currently in progress. The approvals will continue through the workflow as established.

# SilkRoad Onboarding

## New features

SilkRoad Onboarding version 2015.1 provides a number of new features as listed below.

### E-Verify – Duplicate Case Update

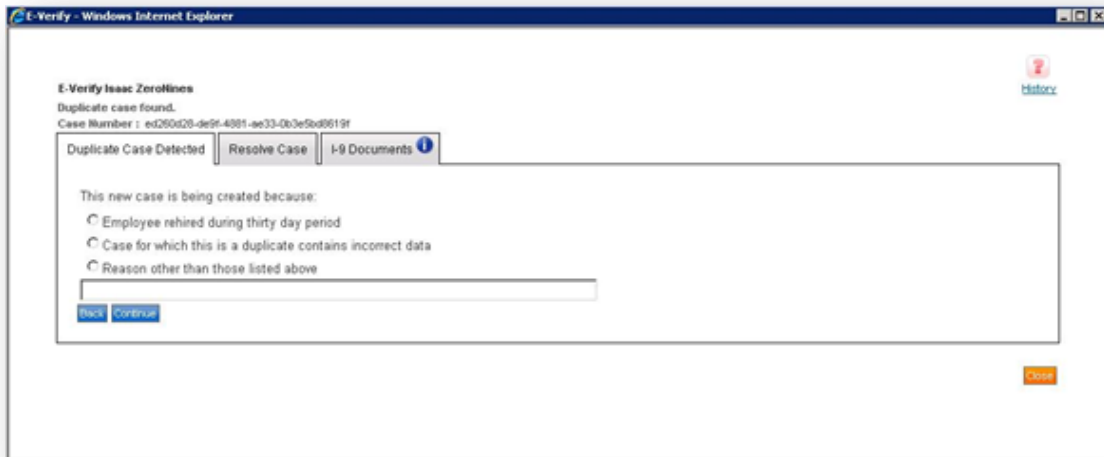
This release includes the following changes required for customers using SilkRoad Onboarding’s E-Verify service.

The E-Verify pop-up now accommodates a duplicate case detected by E-Verify. E-Verify defines a duplicate as a case created for an employee with the same Social Security Number by the same client company id within 30 days. If a duplicate case is detected, a new Duplicate Case Detected tab is now presented. The employer has three choices for processing a duplicate case:

- Continue processing the current case
- Edit the current case
- Close the current case



If the employer chooses to continue, they must select a reason for continuing.



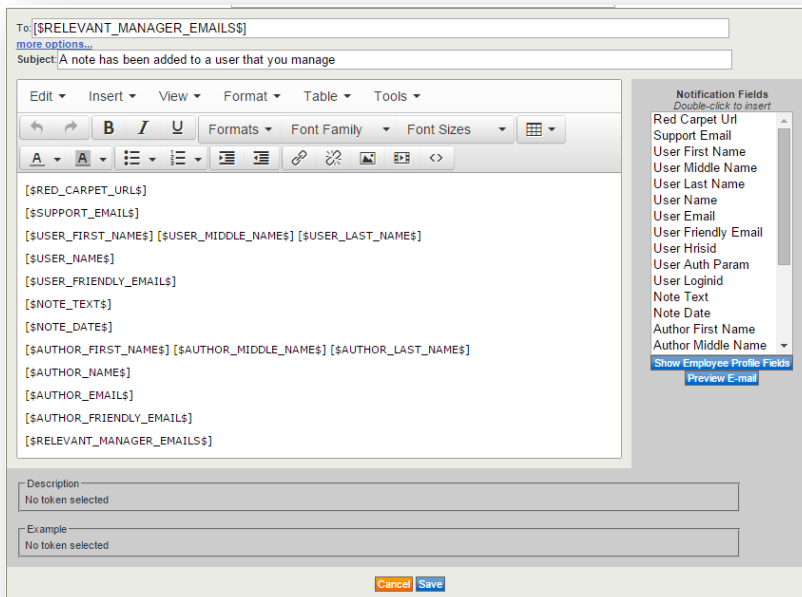
If the employer chooses to close the current case, the Resolve Case tab is shown with two new resolutions.

## Updated HTML Editor

The HTML content editor has been updated. This update provides better support for modern browsers and a consistent look and feel across the Life Suite.

You will find this new editor in the following locations:

- Edit Notifications
- Task Instructions
- Portal Content



Some of the features of the updated HTML Editor include:

- New menu bar for all operations

- Undo/Redo
- Access to Media bank from context menu and insert drop down
- Inline Preview button
- Insert date/time (current date/time in one of several formats)
- Ability to create a new document (clears current document)
- Paste from Microsoft Word now part of regular paste
- Select all
- Reconfiguration of formatting options
- Improved table insert functionality

## SilkRoad Onboarding logo

Based on feedback from users and industry leaders, SilkRoad updated the names for all Life Suite modules in an effort to make each module name clearly identify its function. Since the change in the 2014.3 release, references to RedCarpet have been phased out in the UI and, where applicable, replaced by a SilkRoad Onboarding logo or SilkRoad Onboarding & Work Events text.

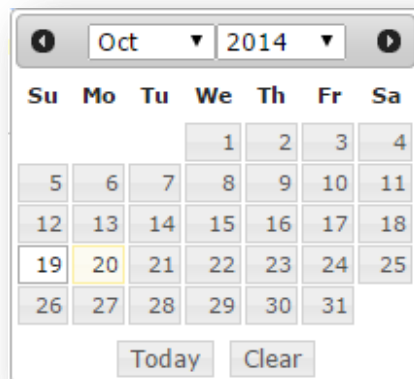
Where the changes have been made in this release:

- Online Help – “SilkRoad Onboarding & Work Events” has replaced “RedCarpet” in text
- Portal options menu – “Return to the SilkRoad Onboarding Portal” link has replaced “Return to the RedCarpet UI” link
- eForms – RedCarpet banner has been removed from the top
- Category picker and pop-ups – removed RedCarpet logo
- Report PDFs - SilkRoad Onboarding logo has replaced the RedCarpet logo

\*Please note: A subset of customers use the RedCarpet login pages with RedCarpet branding. RedCarpet login pages that were not customized will be replaced by the Life Suite login page in an upcoming release.

## New calendar control

The calendar control has been updated for better usability. Anywhere in the product where a date can be selected, this new calendar control will be seen.



## Uploaded document attribute

With the 2015.1 release, customers can now request that a document attribute be made available to associate information with an uploaded document. The attribute(s) can be collected for “additional documents” via the Forms tab, through the employee document upload in the employee portal and for uploaded I-9 documents via the I-9 tab.

The attribute list can be configured to be selected from a drop down list of values. For integration, if the attributes are collected, GetUploadedDocumentList has been extended to include the attributes allowing the metadata to be exported to another system. If you are interested in incorporating this feature with your document uploads, please contact SilkRoad Support at [support@silkroad.com](mailto:support@silkroad.com).

**Edit Employee**  
(EC Test)

Details | Key Properties | Teams & Categories | Events | I-9 | **Forms** | Documents

Forms:

Form Name	Event Name	Completed Date	Include in Download
<a href="#">This New - Form</a>	Demo Onboarding		Form Not Complete*

\*Form not available for download

Additional Documents:

**Upload Additional Documents**

Choose a File  No file chosen

Document Title

Uploaded Document

Document Type Certification ▼

Document Title	Create Date	Document Type	Include in Download
<a href="#">SilkRoad Onboarding Features Checklist.pdf</a>	10/22/2014	<span style="border: 1px solid red; padding: 2px;">Certification</span>	<input checked="" type="checkbox"/>

Select All

## Download documents

The download documents feature is designed to give users the ability to select documents associated with an employee for download to a zip file. Any user who has the permission to search on an employee and access their I-9, Forms or Documents tab will be able to use this feature for that employee. Users can choose to select individual documents by checkboxes or choose to utilize the Select All button. The zip file created is named <employee first name>\_<employee last name>.zip for easy reference.

**Edit Employee**  
(EC Test)

Details | Key Properties | Teams & Categories | Events | I-9 | **Forms** | Documents

Forms:

Form Name	Event Name	Completed Date	Include in Download
<a href="#">This New - Form</a>	Demo Onboarding		Form Not Complete*

\*Form not available for download

Upload Additional Documents

Choose a File  No file chosen

Document Title

Uploaded Document

Document Type Certification

Document Title	Create Date	Document Type	Include in Download
<a href="#">RedCarpet Reporting Overview.pdf</a>	10/21/2014		<input checked="" type="checkbox"/>
<a href="#">SilkRoad Onboarding Features Checklist.pdf</a>	10/22/2014	Certification	<input type="checkbox"/>

Select All

**Edit Employee**  
(EC Test)

Details | Key Properties | Teams & Categories | Events | I-9 | Forms | **Documents**

Additional Documents:

Document Title	Create Date	Include in Download
<a href="#">Direct Deposit.pdf</a>	10/22/2014	<input checked="" type="checkbox"/>

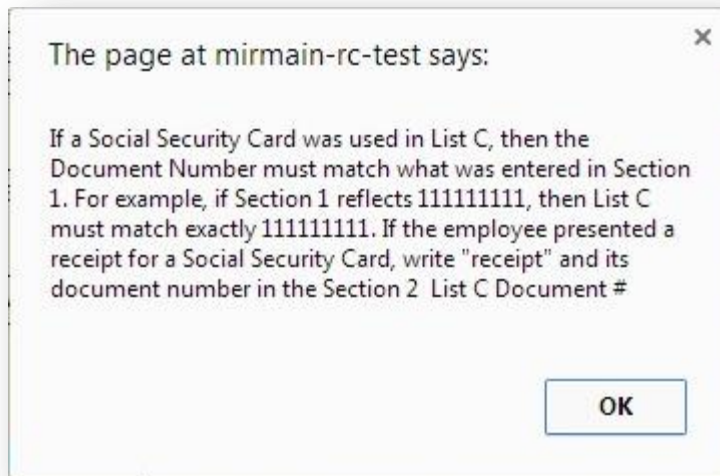
Select All

## Improvements

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

### Usability Improvement on I-9

Additional validation has been incorporated on the I-9 to ensure that the employer enters both the word "receipt" *and* a number (to represent the document number) in the Section 2 List C Document # field. Below is the message displayed if this condition is not met.



## API Enhancements

Enhanced Method	New Fields Added
GetTasks	Event ID, Task ID, Task Due Date, Task Completed Date, Form ID, Task Modeled Activation Date, Task Activation Date/Time
GetUploadedDocumentList	Attribute as a name/value pair
LaunchEvent	First name, Last name, Middle Name, Middle Initial, Event Categories, Creation Date, Event Status, Effective Date
UpdateEvent	First name, Last name, Middle Name, Middle Initial, Event Categories, Creation Date, Event Status, Effective Date
AddTaskEx2	Event ID, Task ID, Due Date, Completion Date/Time, Modeled Activation Date, Activation Date/Time (added these fields to AddTaskEx to create new method called AddTaskEx2)

\*Refer to the API Guide for additional details

### Additional profile field available for reference in task instructions and in custom eForms

This employee profile field has been made available for reference in task instructions and in eForms.

**HRISID:** <\$client.tForWhomUserInfo.Employee\_HRISID>

### Text update: shared dashboard checkbox for delivering emails

The shared dashboard has a new label with improved verbiage as shown below for the delivering emails option.

### Manage Shared Dashboards

Shared Dashboards for EC Test [Change](#)

To create a new shared dashboard please pick an employee to share with, and specify the activation period, and when the information is correct click Save.

Share With Employee  [Select](#)

Activated?

Active From

Active Until

Forward Notifications  ▼

Only send notifications to the employee the dashboard is shared with?

To select category values, first select categories from the list below and click submit

(Demo) Location ▲

(Demo) Department ▲

(Demo) Employee Type ▲

(Demo) Job Level ▼

[Submit](#)

[Cancel](#) [Save](#)

### Additional notes added to Employee Profile

When an employee is added to a team, a note is displayed in the Notes section of the Employee Profile. It shows the team the employee is added to and who made the change and when.

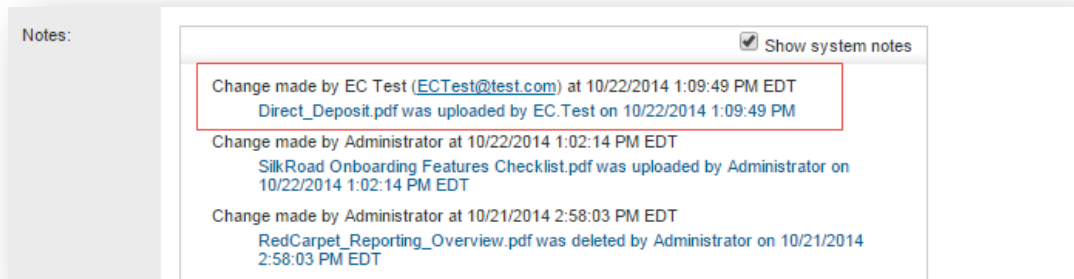
Notes:  Show system notes

Change made by Administrator at 10/23/2014 11:43:52 AM EDT  
[Added as member to the team - HR Coordinators](#)

Change made by EC Test ([ECTest@test.com](mailto:ECTest@test.com)) at 10/22/2014 1:09:49 PM EDT  
[Direct\\_Deposit.pdf](#) was uploaded by EC.Test on 10/22/2014 1:09:49 PM

Change made by Administrator at 10/22/2014 1:02:14 PM EDT  
[SilkRoad Onboarding Features Checklist.pdf](#) was uploaded by Administrator on 10/22/2014 1:02:14 PM EDT

In addition, a note is generated when an employee uploads a document through the portal. It shows the document uploaded, by whom and when it was uploaded.



## Resolved issues

The following issues have been resolved in this release. These issues may not affect all customers. If additional information is required, please contact SilkRoad Support and reference the ID #'s displayed.

Tracking ID	Support Case	Description
Red-589		Improved data storage for events with large number of tasks in workflow
Red-4774	00546095	Improved validation on SSN receipt number in section 2 of I-9
Red-5141		Changes to an employee profile that are made in the portal now appear in the SilkRoad Onboarding UI along with a system note of the change
Red-5402		Corrected category import to accept codes
Red-5211		Corrected order of key properties display
Red-5222, Red-5217	00525308	Fixed intermittent notification issue for self-completing task
Red-5422		Made correction for intermittent site stop
Red-5150		Warning screen not shown when browser set to French
Red-5097	00561399	Time out issue corrected for I9 report when filtered by effective date
Red-5078	00546016	Include archived cases in result set when searching on E-Verify Cases page for resolved codes
Red-4761		Improvement in notification processing
Red-4823		Improved verbiage of message in UI when there is no data to display

# SilkRoad Performance

WingSpan is now SilkRoad Performance. SilkRoad is changing the names of all our Life Suite modules to make each module name clearly identify its function. WingSpan’s name is updated to SilkRoad Performance. In this release, the name change only affects client sites using the WingSpan logo on the login page and the page header. Client sites using their own branding will not be impacted.

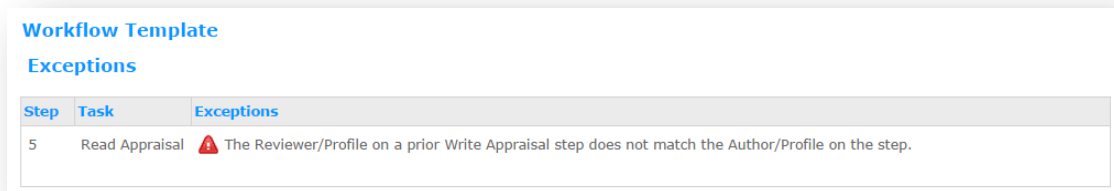
## New features

SilkRoad Performance version 2015.1 provides a number of new features as listed below.

### Appraisal workflow template validation

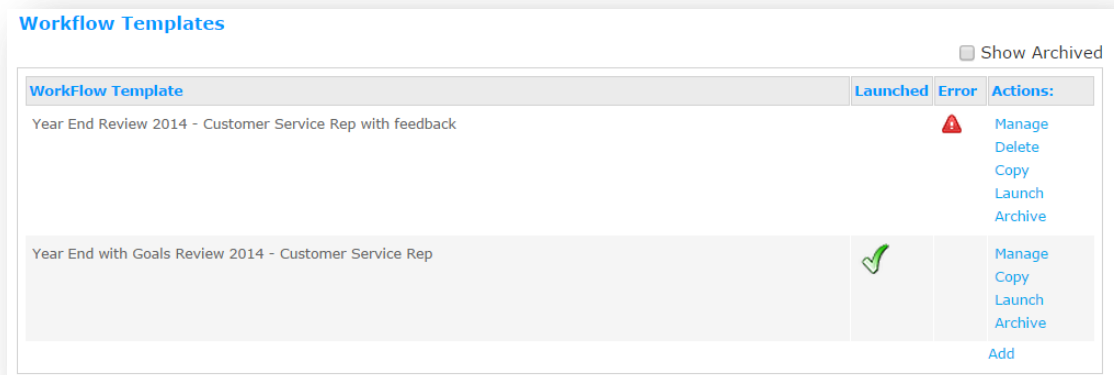
The new appraisal workflow template validation feature identifies the most common problems in unlaunched workflows so you can easily correct them.

When you edit a workflow on the Workflow Template page, the workflow is checked for errors. If one or more errors are found, the errors are displayed in an Exceptions list at the top of the page.

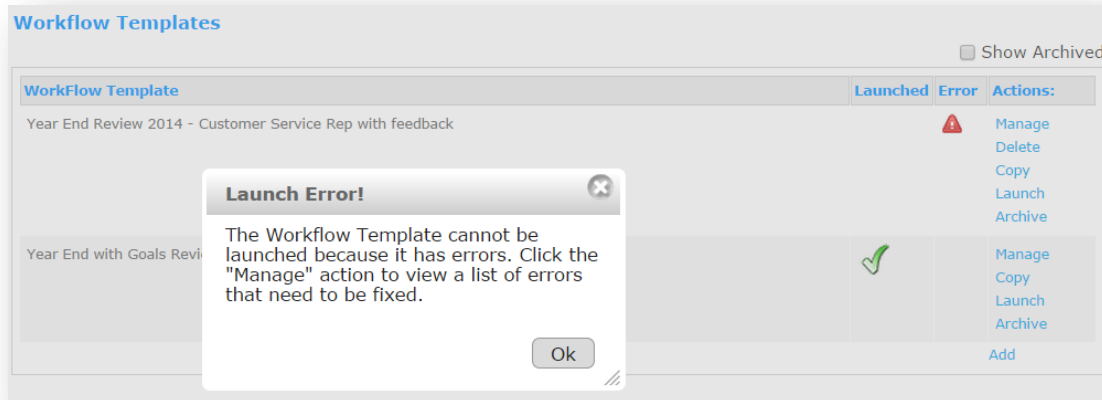


As you correct errors in the workflow, each error is removed from the Exceptions list. Once all errors are corrected, the Exceptions list is no longer displayed.

On the Manage Workflow Templates page, an Error column has been added to show Workflow Templates that have errors.



When you attempt to launch a workflow with errors, a message is displayed indicating that the workflow cannot be launched until the errors are corrected.



The following rules are used to check for errors:

- The first Write Appraisal step that has a Profile with Goal Scoring enabled must be completed by a single reviewer.
- The first Write Appraisal step with Goal Scoring enabled must be completed before another Write Appraisal step with the same Profile is launched.
- A Read Appraisal step must be preceded by a matching Write Appraisal step that is required to be complete.
- A Read Appraisal step that is optional must not have an approval cycle.
- A Read Appraisal step that is required and that launches the next step immediately must not have an approval cycle.

## Appraisal Rating for Employees by Process Report

The Appraisal Rating for Employees by Process Report is a new report available to Direct Managers and Administrators. The report shows ratings for each employee broken out by category, reviewer, and time period for the process selected (e.g., Yearly Review).

The process labels and rating categories (e.g., Overall Appraisal) shown on the report are configured using the Report Metadata feature.

## Admin Appraisal Ratings For Employees By Process

Printed: 10/15/2014 By: Administrator Administrator

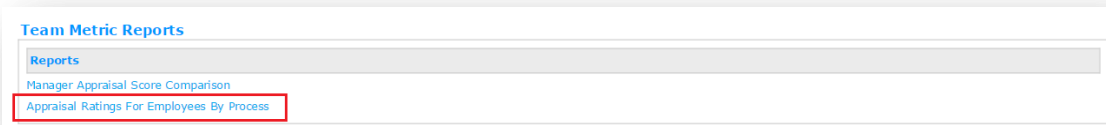
### Process: Year End Review

Tags: Overall Appraisal

Employee Date Interval	Employee #	Self Overall Appraisal	Manager Overall Appraisal
<b>Brady, Bo</b>	<b>0015</b>		
Y2012		4.08	3.61
Y2013		3.92	3.89
Y2014		4.22	4.22
<b>Brady, Carrie</b>	<b>0013</b>		
Y2012		4.61	4.50
Y2013		4.75	4.64
Y2014		3.50	4.28
<b>Brady, Kayla</b>	<b>0007</b>		
Y2012		3.58	3.53
Y2013		3.61	3.58
Y2014		4.50	4.44

### Direct Manager report access

A Direct Manager can access the report for all direct reports on the Appraisal Reports page in the Team Metric Reports section.

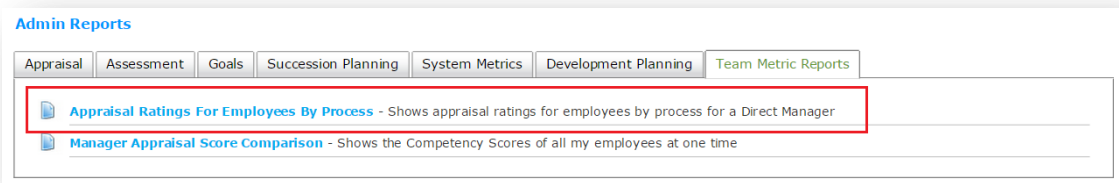


### Administrator report access

An Administrator can access the report for all employees on the Admin Reports page via the Appraisal tab.



If the Administrator is also a Direct Manager, the Administrator can access the Direct Manager version of the report on the Admin Reports page via the Team Metric Reports tab.



## Improvements

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

### Appraisal details open on meeting steps

The Appraisal Detail section now defaults to open on the Manage Meeting and Select Reviewers steps.

### Overwrite protection

Overwrite protection is now optional. Data imported using the XML Templates on the Manage Field Views page is always updated.

When you enable a field view for import on the Manage Field Views page, the setting prevents the fields from being edited in the user interface (UI) but does not impact the import.

## 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, contact SilkRoad Support and reference the ID #'s displayed.

Tracking ID	Support Case	Description
WS-8553		Fixed issue where UDF fields could not be configured for Succession Planning on pool and side-by-side comparison
WS-8792		Fixed issue with translation of the Reports action

WS-8835		on the Assessment Reports page Fixed issue with appraisal auto-launch when January or November was selected
WS-8850	00559756	Fixed issue where goal could not be created because of new line (CR/LF) characters in range

## SilkRoad Learning

GreenLight is now SilkRoad Learning! Based on feedback from users and industry leaders, SilkRoad has changed the names for all our Life Suite modules in an effort to make each module's name clearly identify its function.

### New features

SilkRoad Learning version 2015.1 provides a number of new features as listed below.

Name	Tracking ID	Support Case	Description
Branding and name change	GL-4558		In this release, the product name GreenLight has been changed to Silkroad Learning
Course Catalog Search	GL-4557		The Course Catalog now displays catalog items based on relevance determined by a combination of where word matches occur (Title, Product Code, or Description) and whether matches are exact, all word, or any word.
Notification Test Mode	GL-4544		A new configuration setting is now available to allow customers to turn on/off notification test mode to trap actual notifications and send them to/from a defined email address.
Notifications	GL-3991	510526 307748	All notifications now become held back if they are triggered by a user whose status is currently INACTIVE
Content Launching	GL-4657		When an online course contains content which is set to "load in a separate window" users are prompted with a message informing them that the content launched in a separate window
Talent Portal launching SR Learning Admin	GL-4605		When launching SR Learning Admin Portal from Talent Portal, the Admin Portal launches in a new window
Student Marked Assignments	GL-4600		Student Marked Assignments now display current date as the default and users are prevented from picking a future date.

### SilkRoad Learning branding

Look for the new branding for SilkRoad Learning when your users login to either learning portal:

## Student Login

English

Login

SilkRoad Learning

Username:

Password:

Enter

[Forgot Your Password?](#)

## Student Portal

SilkRoad Learning

MY TRAINING View By: Due Date

Name	Due Date
<a href="#">**APPROVE TA 2&lt;script&gt;alert('hello2');&lt;/script&gt;</a>	--
<a href="#">Service Desk- Submit a Ticket</a>	--
<a href="#">How to Use DIRECTV.com User Reset Tool</a>	--

COURSE CATALOG

1175 Catalog Items

[View All](#)

LEARNING PLANS

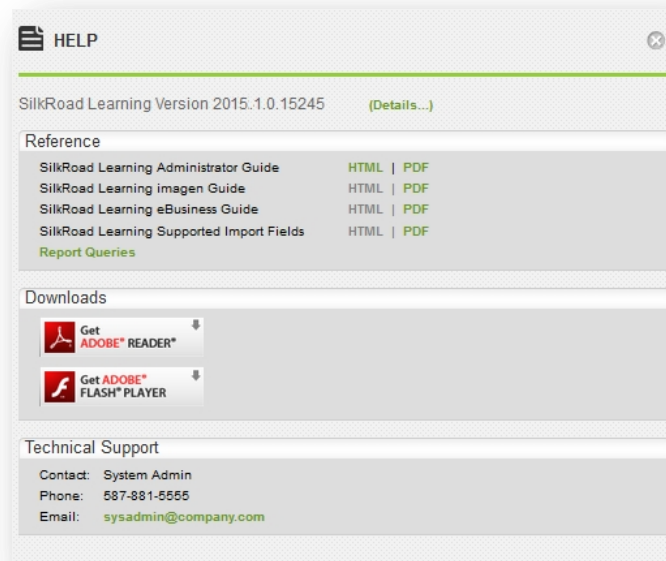
No Active Learning Plans

Status: --

## Admin Login



## Help documentation links



## Administration Portal

Note: Administration portal's "GreenLight" tab is now labeled "Home".

HOME	LEARNING	CONTENT	ENTERPRISE			
<b>Dashboards</b>						
My Dashboard	eCourse Approvals	Students	SCORM Imports	Assess eCourses	Admins	Content Objects
My Profile	Lockouts	Instructors	Your Reports	Training Event Approvals	Checklists	

## Content skin labels and system report names

SilkRoad Learning skin labels and system reports names have changed to remove references to GreenLight.

Skins now appear as:

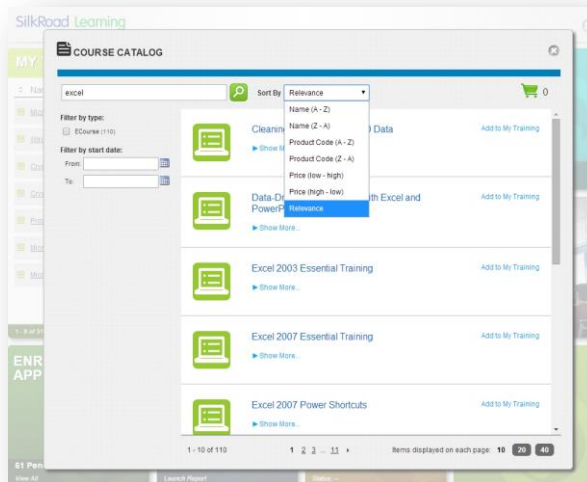
- (Life Suite): the usual default skin
- (Legacy): previously the (GreenLight) skin
- (Troubleshooting): troubleshooting skin to test SCORM, AICC, and sequencing and navigation objects
- (CAI): the Computer Assisted Instruction skin used to present content to users in a classroom environment

System Reports now appear with a prefix of SR instead of GL. For example, GL Student History is now listed as SR Student History. Customers who used the previous system report name as their report name will not see a change. This change will only appear when users add a new system report.

An important note about data and custom skins: previously created instances of system reports or any other named or labeled data will not be modified from "GreenLight." This change will not affect any customizations of skins or media if customized from the defaults.

## Course Catalog search

The Course Catalog now provides the ability to search catalog items based on the relevance of where the search string matches and whether the whole string or words in the string match. By default this is the sort order after any search where no sort is pre-set.



The relevance algorithm used in the search is based on an invisible ranking for the location and type of match. The relevance ranking for the item is then ordered from the highest total rank to the lowest total is rank determined:

### Match

### Example Search String

All words in the Title	"2013 excel" matches "Excel 2013 Introduction" but not "Excel 2012 Introduction"
Exact match in Title	"excel 2013" matches "Excel 2013 Introduction" but not "Office 2013: Excel"

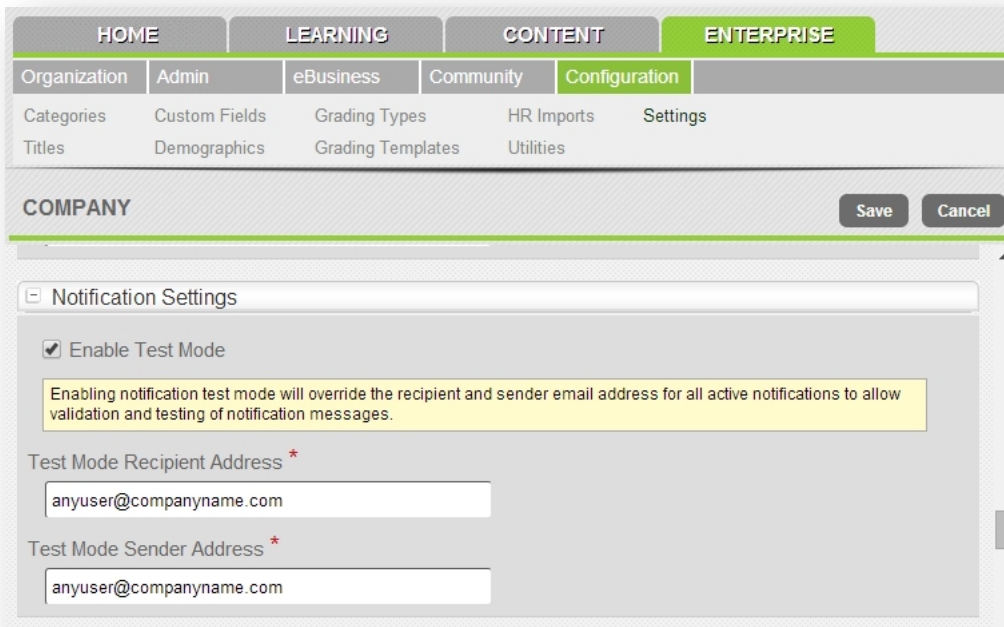
**Match**

**Example Search String**

Any whole word match in Title	"excel 2013" matches "Excel 2013 Introduction" but not "Excellence in Business 2013"
Whole word match any location	"excel" matches "Excel 2013 Introduction" but not "Excellence in Business"
Any word in Title, Product Code, or Description	"excel 2013" is broken into "excel" and "2013" and any item with either word in Title, Product Code, or Description produces a match

**Notification Test Mode**

Users now have the ability to enable Test Mode for all notifications. Both a recipient address and sender address are required to enable test mode. Once enabled, all active notifications will be sent to the specified recipient address from the specified sender address instead of the actual email addresses in the notification.



## Content launching prompt

When online content is set to “load in a separate window” in the Content Object properties, or set when a course is imported to SilkRoad Learning, a message now appears in the window that launches the content.

CONTENT OBJECT PROPERTIES

0 *Zero indicates no limit*

Mastery Determination  
Content Only

SCORM LearnerID  
User + User Course

Load in a separate window

Proctored

Reference

Description

Language  
English (English)

The message that appears informs the user that content should have loaded and suggests action if the content does not load as follows:

Your course should have loaded in a popup window.  
If it did not, please check your browser's popup blocker settings or click the link below.  
Do not close this window until you have exited the course or your results may not be saved.

[Launch Course](#)

SilkRoad Learning

Toggle Menu | PREVIOUS | NEXT | Close

Analyzing Poor Performers

Analyzing Poor Performers

Your course should have loaded in a popup window.  
If it did not, please check your browser's popup blocker settings or click the link below.  
Do not close this window until you have exited the course or your results may not be saved.

[Launch Course](#)

## Content bundle updates

For customers with the OpenSesame standard content bundle, we have updated your site to include 18 new Microsoft Office 2013 and Windows 8 courses. The courses were added with default settings and catalog items were also created but not set to active.

## Discontinuing support for Crystal Reports

This 2015.1 SilkRoad Learning release will be the last release to support Crystal Reports reporting services. Although the majority of customers have already transitioned or have always used SQL Reporting Services, we want to provide any customers who may still be using a Crystal Report to access data time to convert their reports to the SQL Reporting format. If you have existing Crystal Reports that you are currently using, contact SilkRoad support ([support@silkroad.com](mailto:support@silkroad.com)) for assistance in converting these reports to SQL Reporting format.

## 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.

Support Case	Tracking ID	Location	Description
548966	GL-4523 PE-28957	SCORM	Score was not saved if mastery status was set first.
549574	GL-4530 PE-29119	Content Object Activity Icon label	Fixed the misspelling for the label for Task Trainer in the content object activity icon menu.
564393	GL-4689 PE-30485	Checklist	Options menu was not displaying correctly in IE8.
564393	GL-1656 PE-13286 PE-26987	SCORM	Some activities were being marked saved before server replied indicating save was successful. This is related to a previous fix (GL-4048)
	GL-4433 PE-28560	Checklist	Comment data was not correctly saved when submitting or saving a checklist.
	GL-4429	HTML Editor	Fixed known issue with missing localization strings for some tool tips in HTML Editor. Some text remains in English only for color picker and hot keys as these are not within SilkRoad control.
	GL-4540	HTML Editor	An error occurred when the HTML editor was launched in Chinese.
	GL-4604 PE-30260	HR Importer and Chrome	Removed the link for Chrome ClickOnce plug-in. Chrome no longer has a link to download/install ClickOnce plug-in for .NET. To launch the HR Importer application, use either an IE or Firefox browser.

Support Case	Tracking ID	Location	Description
	GL-4494	Register Training Ad-Hoc Assignment	Display issues appeared when saving or closing the HTML Editor when using IE9
	GL-4746	Training Activity	Training Activity description was not being correctly styled when loading as an Activity Tree object.

## Known issues

The following issues remain unresolved in this release. Until they are resolved, use the suggested workaround or avoid them as noted.

### General known issues

The following issues remain unresolved in this release. Until they are resolved, use the suggested workaround or avoid them as noted.

Issue	ID	Workaround
When enabling or changing user session expiry settings, the browser must be closed and re-opened for changes to take effect.	10850	Close and re-launch browser to affect the session expiry settings.
Exported content does not work on Apache web servers when case sensitivity is set to ON.		Set case sensitivity to OFF
Access to pricing matrix and CEU Matrix grant user's unrestricted access to other objects (eCourses, Training Catalog Items, etc.)	GL-1753	Only allocate privilege to these functions for unrestricted users.
Self-marked assignments do not rollup when previewed in the Admin Portal.	GL-2108	Create an eCourse with the content object containing the self-marked assignment and push to a test student to preview and troubleshoot.
Self-launching Assignments do not appear in My Training when part of an Equivalency.	GL-2956	Self-launching Assignments can only be launched and completed from the Competency Learning Options list and do not appear in the My Training page when status is "In Progress".
Billing Group fields appear briefly when refreshing the Invoice properties page.	GL-3911	Support for Billing Group invoicing will be added in a future release.

<b>Issue</b>	<b>ID</b>	<b>Workaround</b>
Flash-based functions, including matching questions, fill-in-the-blank questions and imagen authoring are not supported in Internet Explorer 11.	GL-3762 GL-4502 PE-26656	Firefox, Chrome, and Internet Explorer 10 browsers continue to support Flash content.
Printing multi-page Checklists using Chrome inserts page breaks inappropriately	GL-4232	Firefox and IE10 browsers correctly print multi-page checklists.
Course Catalog does not support token sales/purchase, taxes, or third-party billing		Existing eCom Catalog continues to support these features.
Maximum year in certification Calendar picker is 2015	GL-4222	Use Calendar controls to advance forward from Dec 2015. The Year displays as 2006, but selecting a date will set the year to 2016.
Course Catalog and Checklists do not display when using Internet Explorer 7		Use any modern browser for best results.
When exporting content as SCORM 2004, content activities with "Satisfied by Measure" settings ON (i.e. Required and Scored) do not "Flag failed content as incomplete" when this export setting is ON	GL-4045 PE-24429	Recommend using "SCORM Default" setting instead of "Required and Scored" for activities that need to show incomplete when failed.
Enrolled/Waitlisted status does not display on the Checkout Summary Page when purchasing a Class from the Course Catalog	GL-4205	Users will receive any active notifications that include status. This issue will be fixed in a future release.
HTML Editor when used for Register Training Ad-hoc Assignments will not load in Internet Explorer 7 or Internet Explorer 8	GL-4406	Old Version of HTML Editor will show instead. Users should use browser that supports modern standards.
HTML Editor when used for Register Training Ad-hoc Assignments has issues when viewing properties in Chrome and Firefox	GL-4406	No workaround at this time. Will be addressed in a future release.

<b>Issue</b>	<b>ID</b>	<b>Workaround</b>
Using Internet Explorer 9: Self Marked Assignment does not display "Accept" button in (Troubleshooting) Skin	GL-4315	Set company default skin to be (Legacy) skin NOT LifeSuite Skin.
Attempting to launch the HR Import Utility will prompt user with an error if using Apple Mac OSX or iOS	GL-181	Use Internet Explorer with Microsoft .NET Framework 3.5.0+. If using Firefox browsers, ClickOnce addon is also required.
Chrome ClickOnce extension link not available to launch HR Importer application	GL-4720	To launch HR Importer use either a Firefox browser or an IE browser.

## Localization known issues

The following issues remain unresolved in this release. Until they are resolved, use the suggested workaround or avoid them as noted.

<b>Issue</b>	<b>ID</b>	<b>Workaround</b>
Time zone support		Time zone is not localized based on a user profile. Time zone can be defined and displayed for scheduled Training Events by setting the company default time zone.
Importer Utility displays in English only		Importer Utility used to import legacy records and users is currently in English only.
Notification merge fields		The fields used to display data in notifications currently exist in English only
Documentation		Documentation currently exists in English only
eBusiness currency		The eBusiness function supports one and only one currency. Currency is not localized and displays as \$ (dollars) in the interface.
Imagen author		The imagen authoring tool is currently not localized and is available in English only.
eBusiness subscriptions	GL-4126	Subscription time units always display in English regardless of login language set.
Chrome click-once plugin	GL-4604	Chrome no longer has a link to download and install their plugin. Prompt text displays in English only.
System Report Names		SilkRoad Learning System Report titles appear in English only
Skin Names		SilkRoad Learning Skin Labels appear in English only

## Supported browsers

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

Browser	Version
<b>Internet Explorer</b> ( <i>not compatibility mode</i> )	8*, 9, 10 (Win7), 11*
<b>Mozilla FireFox</b>	Latest*
<b>Google Chrome</b>	Latest*
<b>Apple Safari</b>	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.

**\*SilkRoad Performance:**

- \*IE8 has known issues rendering the application in Windows® 7 and above.
- \*Apple Safari was tested on Windows.

**\*SilkRoad Recruiting:**

- \*IE11 was tested on (Desktop) Win8.

**\*SilkRoad Learning:**

- Student portal- content dependent: SilkRoad has not tested all content types with Safari and Chrome on the Mac; however, many of our customers report using these browsers in the Mac environment with no problem. The Admin Portal has been tested for the three most used browsers on the Windows platform (IE, Chrome, and FireFox).
- The Admin Portal has been tested for the three most used browsers on the Windows platform (IE, Chrome, and FireFox).
- **NOTE:** *The current Life Suite Skin is optimized for use in modern web browsers. At this time, Internet Explorer 9 or higher and the current versions of Chrome, FireFox, and Safari are preferred. All major functions have been confirmed operational in these preferred browsers, but situations may arise where a feature may not be fully supported.*
- Although the Admin Portal can be viewed using an Internet Explorer 7 browser, some admin functions that access Student portal functions, the Course Catalog and the Checklist require a more modern browser to function correctly.

## 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.

The following are capabilities that are known to have limitations on some, or all, tablets:

SilkRoad Onboarding default skin in 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.

For SilkRoad Learning with the Life Suite default Skin in the Student Portal, the iPad and similar tablet devices can be supported. Although the interface can be rendered on the iPad, some content delivered may not be compatible with the iOS or other mobile operating systems (e.g. authoring Checklist forms.)

## Supported languages

Below are the supported languages for each SilkRoad module.

Supported Languages	Recruiting Portal	Recruiting User Interface	Onboarding Portal	Onboarding User Interface	Performance	Learning Student portal	Learning Admin Portal	Talent Portal
Bulgarian (bg)	X							
Czech (cs_CZ)	X				X			
Chinese (Simplified)	X	X	X	X	X	X	X	X
Chinese (Traditional)			X					
Danish (da)	X		X					
Dutch (nl)	X							
Dutch (Belgium) (nl_BE)	X							
English (United States) (en_US)	X	X	X	X	X	X	X	X
English (Great Britain) (en_GB)	X				X			
Finnish (fi)	X							
Flemish						X	X	
French (fr)	X	X	X	X	X	X	X	X
French Canada (fr_CA)	X	X	X	X	X	X	X	X
German (DE)	X	X	X	X	X	X	X	X
Greek			X					

Supported Languages	Recruiting Portal	Recruiting User Interface	Onboarding Portal	Onboarding User Interface	Performance	Learning Student portal	Learning Admin Portal	Talent Portal
Hungarian (hu)	X							
Indonesian					X			
Italian (IT)	X		X		X	X	X	
Japanese (JA)	X	X	X	X	X	X	X	X
Korean (KO)			X	X				
Norwegian (nb)	X							
Polish (PL)	X		X		X			
Portuguese (pt)	X					X	X	
Portuguese - Brazilian (BR)	X		X	X	X	X	X	
Russian (RU)	X		X		X	X		
Slovak (SK)	X		X					
Spanish (Universal) (es)	X	X	X	X		X	X	X
Swedish (SV-SE)	X		X					

## 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](http://support.silkroad.com)
- **Web:** [support.silkroad.com](http://support.silkroad.com)
- **Email:** [support@silkroad.com](mailto:support@silkroad.com)

## Enhancements with SilkRoad

Join us for Enhancements with SilkRoad training sessions! These sessions are completely free and educate participants on recent updates to SilkRoad modules. Please share the appropriate webinar links with your team. All participants will need to register for the webinars via the links provided below.

### **SilkRoad Recruiting 2015.1**

Tuesday, November 18, 2014

10:00am – 11:00 am CST

Reserve your Webinar seat now at:  
<https://www1.gotomeeting.com/register/240624904>

### **SilkRoad Onboarding 2015.1**

Wednesday, November 19, 2014

10:00am – 11:00 am CST

Reserve your Webinar seat now at:  
<https://www1.gotomeeting.com/register/507841968>

### **SilkRoad Learning 2015.1**

Thursday, November 20, 2014

10:00am – 11:00 am CST

Reserve your Webinar seat now at:  
<https://www1.gotomeeting.com/register/445221209>

### **SilkRoad Performance v2015.1**

Friday, November 21, 2014

10:00am – 11:00 am CST

Reserve your Webinar seat now at:  
<https://www1.gotomeeting.com/register/291082025>