



springboard™

Release Notes

Version 7.19
December 2020

Release Notes Overview

This document outlines Springboard release version 7.19 scheduled for release in December 2020.

Version 7.19 introduces the following new features:

- Send Email address book
- Add attachments to interview emails
- Onboarding portal activities visible in candidate review mode
- New self-configured offer management page
- Usability improvements to All Jobs / My Jobs searching
- More processing flag colours
- Warn recruiters when changing candidate status that email automations may occur
- Multi-language careers site and onboarding process

This release also covers bug fixes and other small improvements which are outlined in these notes.

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This document provides details on each key change you will need to be aware of in order to leverage these improvements effectively. Please note that some screenshots in this document represent pre-release versions and may differ slightly in the production release.

Release Date

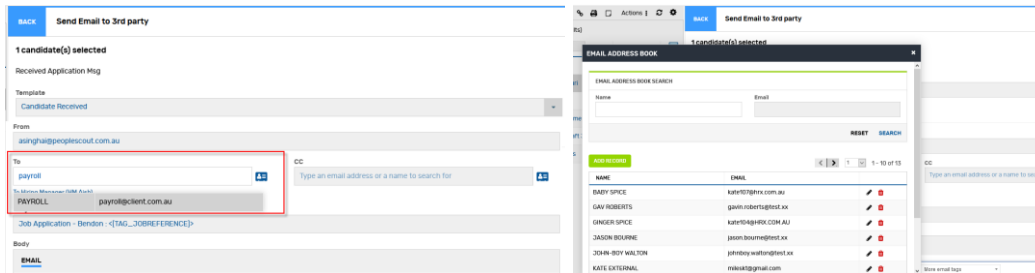
15 Dec 2020

Contact Information

IMPORTANT: Please contact your Springboard Account Manager if you have any questions regarding the information provided in these release notes.

Email Address Book

Use the new email address book to simplify sending emails from Springboard.



With the new email address book, users can:

1. Quickly lookup recipients from an existing address book rather than needing to type email addresses into To and CC field everytime.
2. Quickly add new recipients to the address book

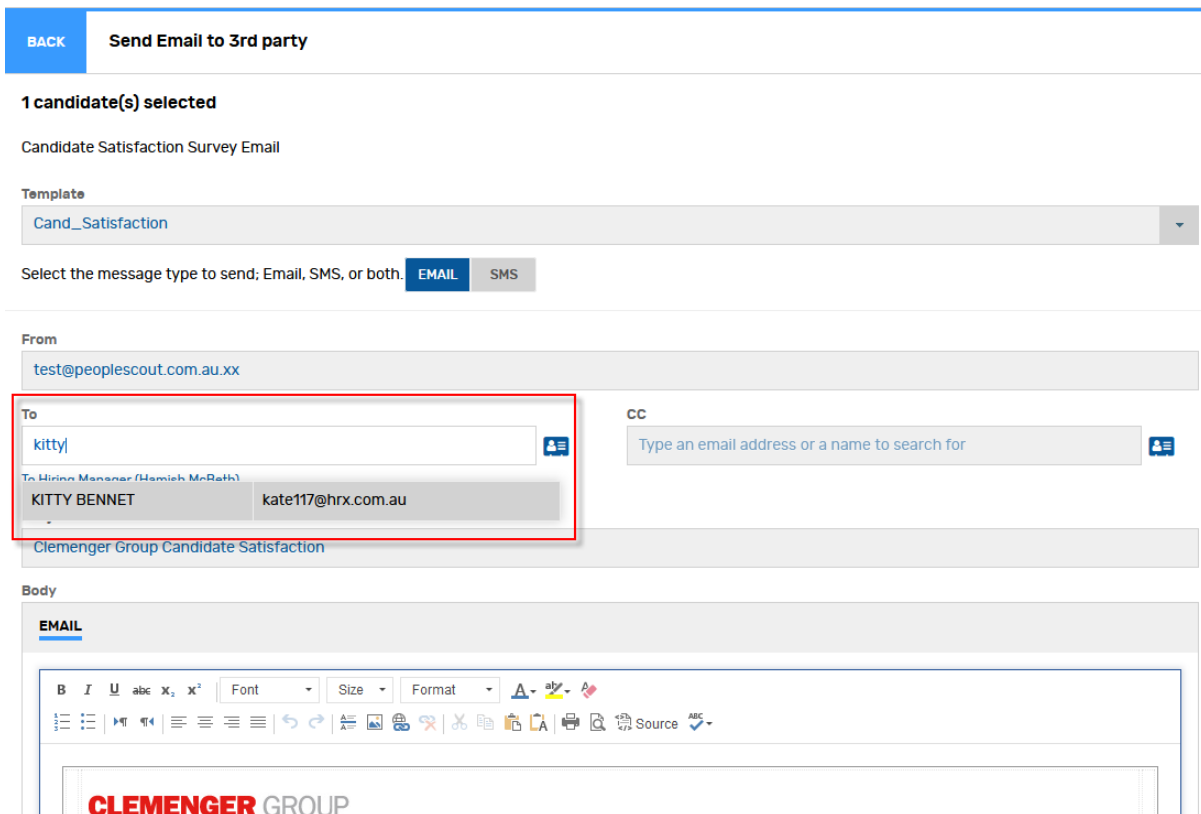
This feature is available when:

- sending an email to a 3rd party recipient
- generating a bulkprint

The address book will be incorporated into other areas of the system in future releases.

Selecting a recipient from the address book

Start typing a recipient by name or email address to find an existing recipient.



Add / Maintain recipients in the address book

If a recipient is not yet in the address book, add new recipients in one of two ways.

First, on typing a new email address into the To or CC fields, a quick link option to 'Save to address book' is displayed. Click the link to add the new recipient to the address book.

The screenshot shows the 'Send Email to 3rd party' interface. The 'To' field contains 'sally@mailinator.com' and a 'Save to address book' link. Below it, the 'Subject' field contains 'Clemenger Group Candidate Satisfaction'. A pop-up window titled 'EMAIL ADDRESS BOOK' is open, showing a table with one record:

NAME	EMAIL	
Sally	sally@mailinator.com	✓ ✕

Alternatively, click the address book icon to view the full address book. From this window, you can add, edit and delete recipients from the address book.

EMAIL ADDRESS BOOK ✕

EMAIL ADDRESS BOOK SEARCH

Name <input style="width: 95%; height: 20px;" type="text"/>	Email <input style="width: 95%; height: 20px;" type="text"/>
---	--

RESET
SEARCH

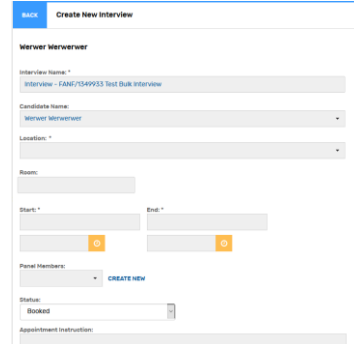
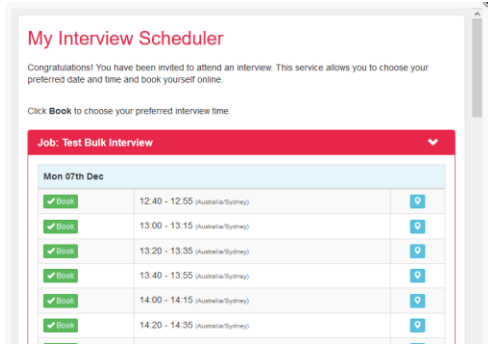
ADD RECORD

<
>
1
1 - 7 of 7

NAME	EMAIL	
ELIZABETH BENNET	kate115@peoplescout.com.au	
JANE BENNET	kate116@peoplescout.com.au	
KITTY BENNET	kate117@hrx.com.au	
LYDIA BENNET	kate114@peoplescout.com.au	
MR BENNET	kate118@peoplescout.com.au	
MRS BENNET	kate119@peoplescout.com.au	
TWO MATES	kate107@hrx.com.au; kate112@hrx.com.au	

Add attachments to interview emails

Springboard provides the ability to generate interview times in the system for a particular role or roles. Once interview times have been created, candidates can book themselves into an interview via the careers portal, or recruiters can manually book a candidate into an available time.

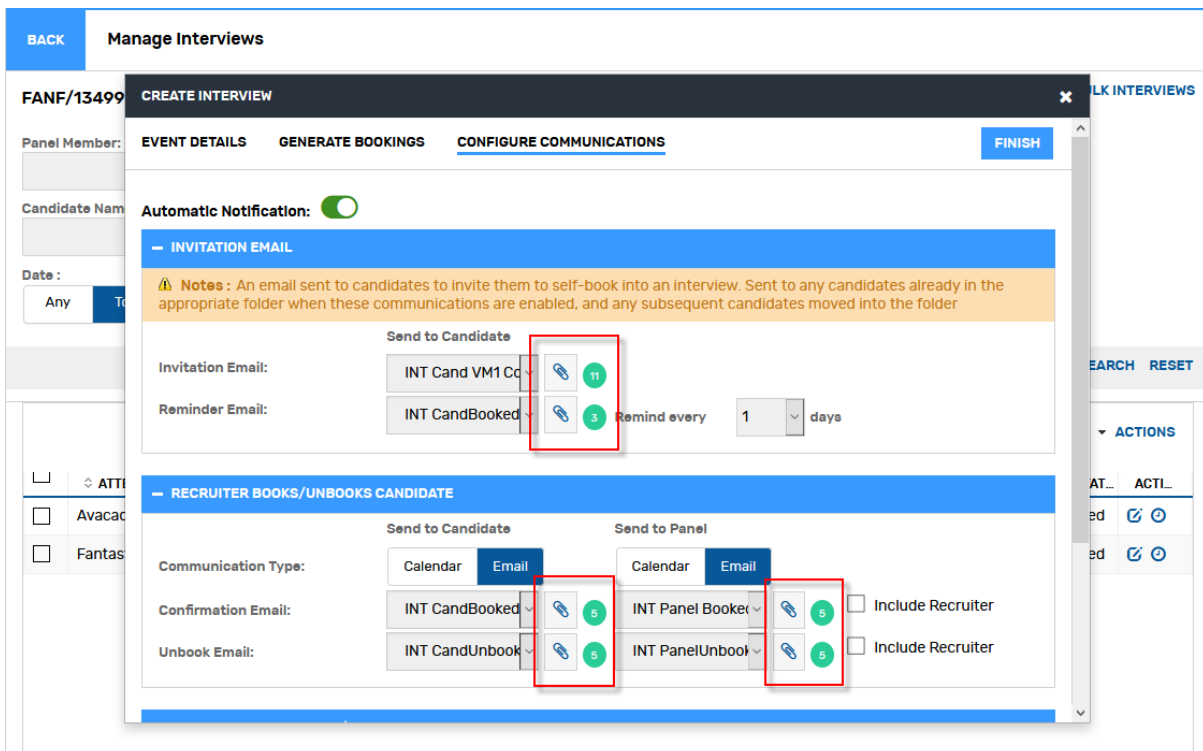


A range of emails can be setup to be automatically sent to various such as candidates, recruiters and hiring managers. For example:

- Confirmation emails
- Interview cancelled emails
- Reminders and follow-ups.

With this release, attachments can now be included on these automated emails. Documents that can be attached to interview emails include:

1. Candidate's resume
2. All documents associated with the candidate
3. Position Description
4. Manually uploaded documents



**SELECT THE DOCUMENT TYPES FOR ATTACHMENT**

- Position Description
- Primary Resume
- Application Documents

ADDITIONAL ATTACHMENTS

File Upload

+ CHOOSE OR DRAG IN A FILE

No file attached.

Attached Documents**Cancel Confirm****SELECT THE DOCUMENT TYPES FOR ATTACHMENT**

- Position Description
- Primary Resume
- Application Documents

ADDITIONAL ATTACHMENTS

File Upload

+ CHOOSE OR DRAG IN A FILE

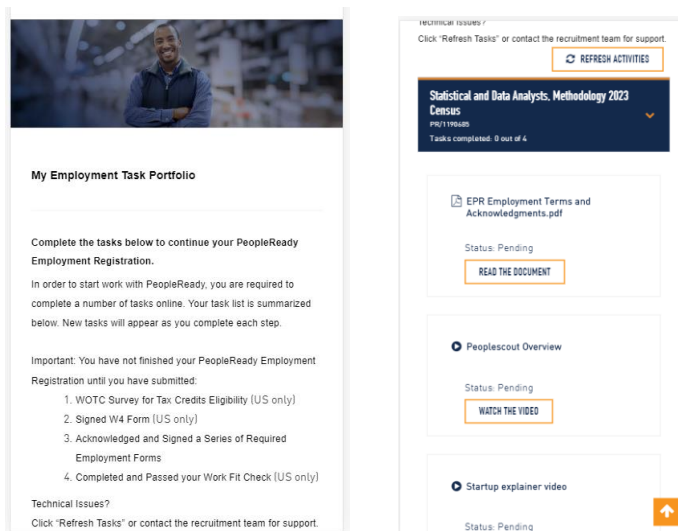
No file attached.

Attached Documents**Cancel Confirm**

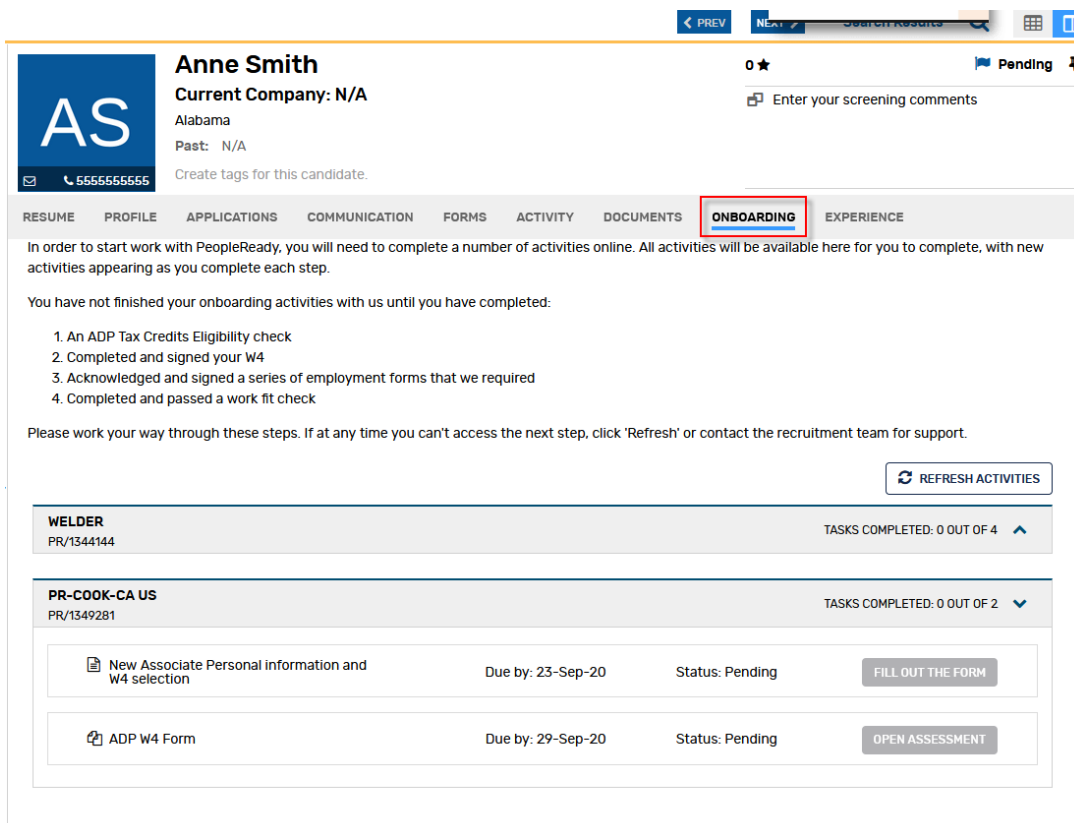
Onboarding activities visible from Candidate Review

Recently, a new version of Springboard's Onboarding Portal was launched and is available for clients to upgrade to. This version introduces a new mobile first design, making it easy to review and complete all onboarding activities and tasks from a mobile or tablet device.

All onboarding activities are presented in a single clear, easy to review list, with the prior approach of segmenting tasks into Documents, Forms and Offer tabs being removed.



With this release, a new tab - Onboarding Activities - is available to be added to the Candidate Review tab in Springboard. This new tab provides recruiters with a clear view of a candidate's onboarding activities and status.



Who will have access to this feature?

This new tab is only compatible with the new version of the Onboarding Portal.

Contact your account manager if you would like to discuss upgrading to the new version of the onboarding portal.

New Self Configurable Offer Management screen

As part of our on-going efforts to make Springboard more easily configurable by clients, a new Offer Management screen can now be enabled in conjunction with the new application form.

Clients should expect no immediate change to their existing offer management process as part of the release.

The new offer management screen builds upon the client configurable application form process to provide the following benefits to clients:

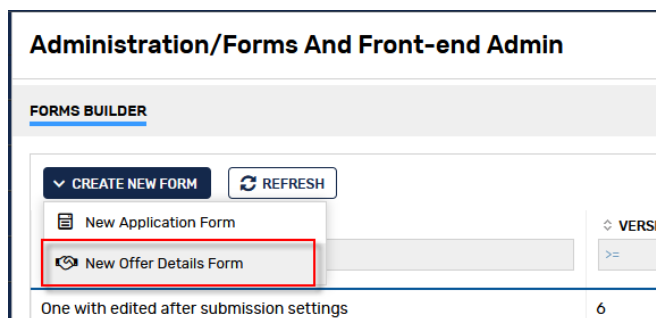
1. Create your own offer management form, adding as many fields & questions as desired
2. Define which fields are visible to the recruiter, hiring manager and admin user via a point & click interface
3. Define required fields for the offer form to be submitted
4. Setup restrictions to stop a candidate being moved forward in the recruitment process until the offer has been captured and submitted correctly.
5. Pre-fill offer fields from any fields captured on the job or job advertisement, with an option to customise / overwrite these fields as part of making the offer.
6. Pre-fill offer fields from any online forms or application form.

[screenshot - offer mgmt. screen from the backend]

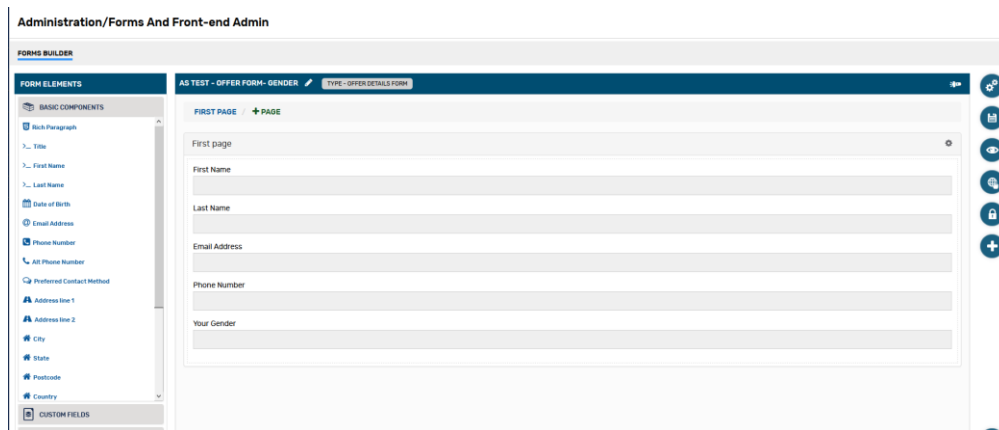
Creating the offer management form

The offer management form can be built and maintained overtime by clients. Go to Administration -> Forms and Frontend Admin to access the Application Forms Builder.

From this screen, build an Offer Management form in the same way that an Application form would be built.



To add fields to your offer form, simply drag and drop from the library of fields available in the Forms Elements toolbox.



Define Visibility Settings for the Offer Form

For every field available on the offer form, you can define whether the recruiter, hiring manager and administrator can view and/or edit each field.

Click on the Visibility Settings icon. 

The Visibility Settings popup screen provides a list of all fields configured on the offer form.

ELEMENT LABEL	ORDER (DISPL.)	PREFILL FROM	RECRUITER SETTINGS	HIRING MANAGER SETTINGS	ADMIN SETTINGS
First Name	1	Select One	ALL	ALL	ALL
Last Name	2	Select One	ALL	ALL	ALL
Email Address	3	Select One	ALL	ALL	ALL
Phone Number	4	Select One	ALL	ALL	ALL
Your Gender	5	Select One	ALL	ALL	ALL

By default, Recruiters, Hiring managers and Administrators can view and edit all fields. Modify the settings for each field using the dropdowns available.

ELEMENT LABEL	ORDER (DISPL.)	PREFILL FROM	RECRUITER SETTINGS	HIRING MANAGER SETTINGS	ADMIN SETTINGS
First Name	1	Job Approver Name (approverName)	Hidden	Read-only	Editable
Last Name	2	Job Filled By Name (filledByName)	Read-only	Hidden	Editable
Email Address	3	Select One	Editable	Editable	Editable
Phone Number	4	Select One	Editable	Editable	Editable
Your Gender	5	Select One	Editable	Editable	Editable

Prefill fields on the offer form

Some fields on the offer should be pre-filled based on existing information in Springboard and customised as part of making an offer to a candidate.

For example, the Job Type may default to 'Permanent' based on the job posting, however at the time of offer it may be agreed to offer this as a contract position.

Alternatively, there may be a guideline salary for the position that is pre-filled into the offer, but that salary is adjusted for the candidate being offered the position.

Click on the Visibility Settings icon to pre-fill fields



For each field on the offer, select fields from the Job or Job advertisement that should pre-fill that field.

VISIBILITY SETTINGS

Please make sure you save your form before editing the privacy settings (new form elements will not be available for editing the settings until you save your form).

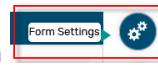
FORM ELEMENTS LIST

ELEMENT LABEL	ORDER (DISPL.)	PREFILL FROM	RECRUITER SETTINGS	HIRING MANAGER SETTINGS	ADMIN SETTINGS
First Name	1	Select One	Editable	Editable	Editable
Last Name	2	Select One	Editable	Editable	Editable
Email Address	3	Select One	Editable	Editable	Editable
Phone Number	4	Select One	Editable	Editable	Editable
Your Gender	5	Select One	Editable	Editable	Editable
Job Title	6	JobAd Short Title (shortTitle)	Hidden	Read-only	Editable

Setting change status restrictions

Many recruitment processes seek to restrict a candidate from being moved being the Make Offer step of the workflow until the offer has been submitted correctly.

Setup these change status restrictions via the Settings icon



From this panel, you can enable recruiters to Save an Offer as draft and return to it later. You can also define the steps of the recruitment process that the candidate may not be moved to until a valid offer has been submitted.

A screenshot of a web application window titled "OFFER DETAILS FORM" with a "DRAFT" button and a close "X" icon. The form contains several sections: "Form title" with the value "AS Test - Offer Form- gender"; "Description" with a long text string; "Date Pattern" with a dropdown menu showing "dd/MM/yyyy"; two checked checkboxes: "Enable Save as Draft" and "Restrict candidate being moved to these statuses until offer submitted:"; and a "Workflow Steps" dropdown menu showing "3 Selected" with three buttons labeled "REF", "OFM", and "EMP".

Submitting an offer

To submit an offer for a candidate, select Manage Offer -> Offer Details from the candidate action menu. Fill out the offer form and submit.

[BACK](#) Offer Details

1 candidate(s) selected

1 FIRST PAGE

First Name
Ria

Last Name
Smith

Email Address
ssreepathi@peoplescout.com.au

Phone Number
12345678

Your Gender

Job Title
Retail Supervisor

[CLOSE](#) [SAVE AS DRAFT](#) [SUBMIT](#)

Search improvement to All Jobs / My Jobs

Some small improvements have been made to the All Jobs / My Jobs screen to make it easier to search for jobs by position title.

To perform an open search on positions - for example “store” managers, simply type “store” in the job ref / position title field and press the <enter> key or click search.

The screenshot shows the 'Jobs/All Jobs' search interface. The 'Job Reference/Title' field is highlighted with a red box and contains the text 'store'. Other fields include 'Hiring Manager', 'Department', 'Position Number', 'Approver', 'Sourcer', 'Job Type', 'Data Approved', 'Primary Sort', 'Recruiter', 'Status', 'Location', 'Data Filled', and 'Secondary Sort'. A 'Create New Job' button is visible in the top right corner.

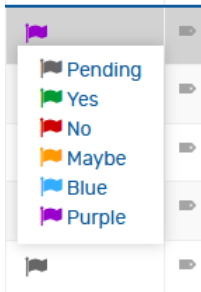
The screenshot shows the search results for the query 'store'. The table has the following columns: JOB REFERENCE, JOB TITLE, CANDIDATES, JOB ADS, LOCATION, JOB STATUS, DEPARTMENT, and RECRUITER. The results are as follows:

JOB REFERENCE	JOB TITLE	CANDIDATES	JOB ADS	LOCATION	JOB STATUS	DEPARTMENT	RECRUITER
BG/1311066	Assistant Store Manager - St Lukes1	2(17 New)	0	Auckland	Approved	Retail/Store/NZ - Auckland	Brittany Potter
BG/1335548	KIT Store Manager Christchurch	0	0	Canterbury	Approved	Retail/Store/NZ - Canterbury	site admin
BG/1335546	KIT Store Manager Christchurch	1(1 New)	0	Canterbury	Approved	Retail/Store/NZ - Canterbury	site admin
BG/1310070	Store Manager Otaki	2(18 New)	1	Wellington	Approved	Retail/Store/NZ - Wellington	Brittany Potter
BG/1343906	Storekeeper	1(1 New)	0	Sydney	Approved	Wholesale/Australia/Australl...	Annie Lam
BG/1338785	Storekeeper	1(1 New)	0	NSW	Approved	Wholesale/Australia/Australl...	Annie Lam
BG/1338827	Storekeeper NSW	1(1 New)	0	NSW	Approved	Wholesale/Australia/Australl...	Annie Lam

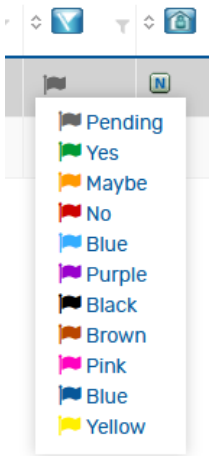
Some other smaller navigation issues that were causing challenges for users have also been resolved.

More processing flags to classify your candidates

Clients love the 5 coloured processing flags used for classifying candidates during screening activities.



With this release, we've increased the number of flag colours to 10:



In addition, we've provided a way to customise the labels of these additional flags, so you can align the colours to meaningful classifications within your organisation.

Change the labels by going to the Reference Data Admin module and search for the Category: STAGE_FLAGS.

For example, change the label of the Black flag to "Certificates sighted" to track this group of candidates.

Category Name	Item Label	Item Value	Item Image	Item Order	Parent Item	Item Comment
STAGE_FLAGS	Pending	WHITE		0.0		
STAGE_FLAGS	Yes	GREEN		1.0		
STAGE_FLAGS	Maybe	AMBER		2.0		
STAGE_FLAGS	No	RED		3.0		
STAGE_FLAGS	Dark Blue	BLUE		4.0		
STAGE_FLAGS	Purple - AS	PURPLE		5.0		
STAGE_FLAGS	Certificates sighted	BLACK		6.0		
STAGE_FLAGS	Brown	BROWN		7.0		
STAGE_FLAGS	Pink	PINK		8.0		
STAGE_FLAGS	Blue	DARKBLUE		9.0		
STAGE_FLAGS	Yellow	YELLOW		10.0		

Warn users when emails may be sent on changing candidate status

With Springboard's Rules Engine, emails can be setup to be sent automatically sent to candidates, hiring managers, recruiters and other recipients when a candidate is moved from one status to another.

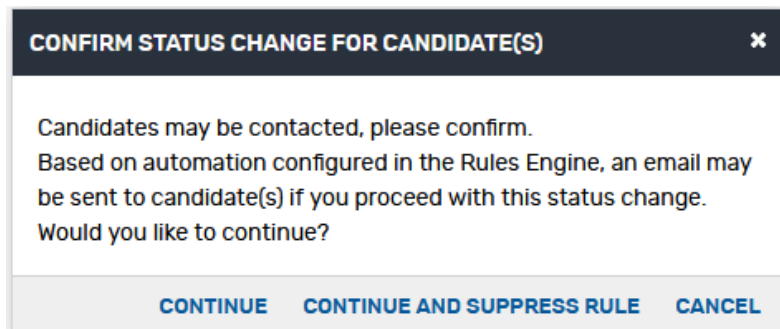
Some clients have indicated that they would like some warning if emails could be sent automatically when changing a candidate's status.

With this release, a warning can be enabled for one or multiple steps of your recruitment workflows. The warning will appear when an email *MAY* be sent as a result of the candidate being moved into that step.

In addition, the user can choose whether to suppress those automations from occurring.

Note: there are some important limitations to this feature:

1. The warning that emails might be sent is just that - a warning. Whether or not the email is actually sent will depend on the specific configuration of the rules automation and the candidate being moved.
2. Suppressing automations will suppress ALL automations setup on that folder.



Multi-language careers sites & onboarding portal

Springboard's career site and onboarding portal can now support multiple languages, providing clients who's candidates may apply with languages in addition to English.

Inicio | TODOS LOS EMPLEOS | MIGRAJÓRNO | REINTEGRARSE

#ESTOY LISTO PARATRAABAJAR

Estoy Listo Para Triunfar

PeopleReady es un proveedor nacional de recursos humanos que conecta a las personas con los empleos en diversos sectores. ¿Trabajemos juntos para encontrar su trabajo ideal?

- ✓ Ofertas de empleo de más de 20 000 empresas que buscan personal.
- ✓ Cuenta en un socio con más de 30 años de experiencia en el sector que

Datos del Empleado: | Datos de Recomendaciones | Datos de contacto en caso de e... | Datos del formulario W-4

< 1 de 4 >

Datos del Empleado:

Apellido: Sergio	Nombre: Santibanez	Inicial del segundo nombre:
Línea de dirección 1: 22 test Street	Línea de dirección 2:	Ciudad: US
Estado/Provincia: AL	Código postal: 36104	
Fecha de nacimiento: 14-12-1995	Fecha de inicio: 08-12-2020	Ocupación:
Dirección de e-mail: Spanishguy2@mailinator.com	Teléfono de contacto: 565-323-4561 <small>Ingrese un número de teléfono válido en formato 000-000-0000.</small>	Teléfono particular: <small>Ingrese un número de teléfono válido en formato 000-000-0000.</small>

RETURN TO ACTIVITIES | LIMPIAR | PDF | GUARDAR | < PREVI | PRÓXIMO >

Who will have access to this feature?

Setting up multi-language careers portals will require consultation with our implementation team. Contact your Account Manager if you are interested in discussing careers portals in multiple languages.

Minor bug fixes & Enhancements

The following lists other items that have been fixed or improved as part of this release. If you would like further information on any of these items, please contact Application Support.

Candidate Management

- Enhanced Springboard reference checking form to allow candidates to make edits to the referees they submit post initial-submission
- Minor improvements to the Campaigns Module - carousel layout
- Fixed issue where some documents could not be viewed by some authorised users
- Fixed issue that could cause the system to crash when booking a candidate into an interview under some circumstances

Candidate Search

- Ensure the 'Invite to Apply' search feature works with the new candidate search module

Jobs & Adverts Management

- Fixed an issue where some job notes wouldn't appear when a default workflow is assigned to a job
- Added options to automatically send Hiring Managers invitations to access Springboard when a job is approved

Administration

- Improvements and fixes to the new Reference Data admin module
- Support uploading reference data in multiple languages via the new Reference Data Admin module

Platform

- Improvements to the notifications bubble used to notify users of releases and system outages
- Improvements to the Synchronise Rules and Reset Rules features.