



springboard™

Release Notes

Version 7.22
July 2021

Release Notes Overview

This document outlines Springboard release version 7.22 scheduled for release in July 2021.

Version 7.22 introduces the following new features:

- FlareHR Onboarding Integration
- Ways to encourage candidates to build their talent profile
- Link candidates to other agencies within your organisation
- Improvements to signing documents with DocuSign
- Talent Profiles - manage approved email domains that can register to your community
- Super user ability to manage candidate visibility within the system
- Tailor more email content for receivers of multi-recipient forms
- Invite candidates to complete a 3rd party assessment via SMS
- Remind candidates to book into an interview via SMS
- Increase candidates per page on candidate grids
- Small usability improvements

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.

Contact Information

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

FlareHR Integration

Springboard is upgrading the superannuation collection functionality in partnership with Flare, an industry-leading HR Onboarding software.

These upgrades form part of our ongoing progression towards future automation of superannuation functionalities, starting with streamlining the employee workflow.

We're providing, via the Springboard Onboarding portal, new ways for candidates to select and define their bank account, tax and superannuation details.

Once enabled, new employees adding their own super membership in their profile will see some additional options to choose from. The selection of certain options will allow them to choose a new super fund via a web service, as well as facilitating super consolidation if they want to do this. They will still have the option to set their own fund or opt into your employer default fund.

Later down the track, we'll be able to build on this even more and look at further management of the back-office superannuation functions such as SAFF files.

The screenshot shows the 'KIT Surveyor' onboarding portal. The navigation bar includes 'HOME', 'ALL JOBS', 'MY APPLICATIONS', 'JOB ALERT', 'MY PROFILE', 'MY DETAILS', and 'LOGOUT'. The user's ID is 'FPH/1351433' and 'Tasks completed: 1 out of 13'. A yellow banner prompts the user to 'Finish your application by completing the tasks below.' with a 'Start Next Task >' button. The task list includes:

- Personal Details (Click to Expand)
- FLARE INTEGRATION** (Fill out the Form)
- TAX DETAILS (15 mins) (Fill out the Form)
- NEW EMPLOYEE DETAILS MANAGEMENT FORM2 (15 mins) (Fill out the Form)

HOME ALL JOBS MY APPLICATIONS JOB ALERT MY PROFILE MY DETAILS LOGOUT

Return to Activities

Bank Details

Tax Details

Super Selection

Add your bank details

Customise where your pay goes by adding a primary bank account and any additional bank accounts

Primary Account

Account nickname	Account name*	BSB*	Account number*
Pogo	P Patterson	732270	56756788

WBC -
Wentworthville -
22-24 Station
Street

Additional Bank Accounts

+ Add a bank account

Reset Submit

Who will have access to this feature?

We'll be working with clients over the coming weeks to determine where the FlareHR partnership can be incorporated into your clients' candidate onboarding engagement.

Encourage candidates to complete a talent profile

This release introduces new ways to encourage candidates to complete a talent community profile as part of their application process.

Option 1 - force candidates to submit a profile before completing an application

With this option, candidates can be requested to complete a talent profile prior to submitting their first application:

- On registering, redirect the candidate to their profile before reaching their application
- Their application is then pre-filled with any matching fields from their profile
- On subsequent applications, they are not asked to re-update their profile

View Job Details and click Apply Now button.

The screenshot shows a job listing for 'PLANNING SUPPORT ADVISOR - SWAT'. The page is divided into two main sections: 'About this role' and 'Job details'. The 'About this role' section includes information about the working location (Waikato CBD, Hamilton), the role's duration (12 months, 20 hours per week), and a description of the role's responsibilities. The 'Job details' section lists the job reference (J/1351269), location (North Island - Waikato - Hamilton), job type (Permanent Full time), expertise (Non-clinical - Project Manager - Project Manager), posted date (16-Jun-2021), and closes date (28-Jun-2021). A green 'Apply now' button is highlighted with a red box, along with 'Print job' and 'Email job' links.

Register of login as usual

The screenshot shows a registration form titled 'Tell us about yourself before applying for the role'. The form asks for personal information to be added to the National talent pool. The fields are: Given name(s) (David), Family name (Parker), Email (dparkerg@peoplescout.com.au), and Password (masked with asterisks). A green 'Continue to your profile' button is highlighted with a red box. Below the form, there is a section for 'Already have an account?' with a 'Sign in' link.

Candidate enters a talent community profile before proceeding to complete their application

Home All Jobs My Applications Job Alert My Profile My Details Logout More ▾

Attachments

Choose or drag in a file
Upload resume (click to change)

Upload from:
or  

⚠ No files attached. Please note: uploading attachments is not mandatory.

Personal Details

Email Address

First Name * Last Name *

Phone Number *

Street Address

Country

City State/Region Postal code

You can now input details and submit the Application.

Home All Jobs My Applications Job Alert My Profile My Details Logout More ▾

/1351269 - PLANNING SUPPORT ADVISOR - SWAT

1 PERSONAL DETAILS & WORK ELIGIBILITY — 2 PROFESSIONAL DISCIPLINE & FITNESS TO WORK — 3 REFERENCES/DIVERSITY/DECLARATION

Details

Position: Job Location

Job Reference: Island Region District

Applicants must complete this form personally and answer all questions.

Information collected on this form is used to assess your suitability for employment. This information will be held securely and will be accessed by authorised staff only. You have the right to access your personal information at any time, and to seek any correction you think is necessary to ensure accuracy.

Personal Details

First Name * Last Name *

Email Address * Phone Number *

Are you currently living in New Zealand? * Yes

How did you hear about this position? *

This option works particularly well where clients Link Out to an external ATS from the careers site to capture candidate applications - a central talent profile can still be captured prior to the candidate submitting their application in an external ATS.

Option 2 - Encourage candidates to complete a profile after submitting an application

With this option, candidates can be encouraged to complete a talent profile following the submission of their application.

The profile can be pre-filled based on the application submitted, and the system can be configured such that:

- 1.) Only the first application submitted updates the talent profile. Subsequent applications do not alter a candidate's profile.
- 2.) Every application submitted updates the candidate profile with the latest information
- 3.) Application data is never updated to the candidate profile.

Application confirmation screen encouraging candidate to complete talent profile

Success!

Shooting Sports Facilities Program Advisory
Committee - Member, Shooting Sports Facilities
Program Advisory Committee



Your application has been submitted

We'll use your details to pre-fill future applications. Sign in to your account to view or update your details.

[Go to your account](#)

Application form selector dropdown to configure pre-fill options

APPLICATION FORM DRAFT ✕

Mandatory files to be uploaded on Submission ?

Upload Types

Populate candidate profile on submitting application ?

- Never populate profile from application
- Never populate profile from application
- Populate only if a profile does not yet exist
- Always update profile based on application submitted

Enable Save as Draft

Draft Button label *

Save as Draft

Submit Button label *

Submit Form

Questionnaire label *

Questionnaire

Custom CSS Class

SAVE CLOSE

Link candidates to other agencies within your organisation

For clients that segregate Springboard instance into multiple agencies or departments, it's not typically possible for a user in one agency to recommend a candidate to a job in another agency.

With this release, Springboard can be configured to allow users in one agency to recommend (push) a candidate to a job within another agency's Springboard instance.

This utilises the Link to Job - Copy feature, providing the ability to copy a candidate application from one job to another across agencies.

1 candidate(s) selected

Link Type
Copy

Link to Job

Link to Different Agency/Organisation

JOB REFERENCE	JOB TITLE	RECRUITER	ORGANISATION
KHJ/1351247	Test Job 3 - Swat	HBDHB_site HBDHB_admin	Hawke's Bay District Health Board (Hastings/Napier)
KHJ/1351269	PLANNING SUPPORT ADVISOR - SWA	site admin	Kiwi Health Jobs
KHJ/1351284	PLANNING SUPPORT SENIOR ADVISO	site admin	Kiwi Health Jobs
KHJ/1351340	TEST HR Advisor2	FULL_ATS Test_Account	Kiwi Health Jobs
KHJ/1351243	Test job II - Swati	HBDHB_site HBDHB_admin	Hawke's Bay District Health Board (Hastings/Napier)
KHJ/1351321	TestDoctor2	LITE_ATS Lite DHB User	Hawke's Bay District Health Board (Hastings/Napier)
KHJ/1351331	Registered Nurse (MP)	LITE_ATS Lite DHB User	Hawke's Bay District Health Board (Hastings/Napier)
KHJ/1351362	Goat Herder 2	Lite DHB Lite DHB User	Hawke's Bay District Health Board (Hastings/Napier)
KHJ/1351402	Cleaner Test	LITE_ATS Lite DHB User	Hawke's Bay District Health Board (Hastings/Napier)

Who has access to this feature?

This feature is only appropriate for certain Springboard customers and must be specifically enabled via configuration controller by Application Support.

Clients can define which agencies can push candidates to which agencies.

Concerns about Security?

This feature, once enabled, provides one agency (Agency A) to view the open requisitions of another agency (Agency B) and create a copy of a candidate from their job into Agency B's job.

This feature does not provide Agency A with the ability to see other candidates in Agency B's role.

Also, candidates can only be shared between two agencies within the same Springboard Site.

If you are interested in the feature but would like to know more about any security / privacy impacts, please contact your account manager.

Improvements to signing documents with DocuSign

In 2020, Springboard has partnered with DocuSign, the best known provider of digitally signed documentation, to offer an automated, intuitive approach to generating and signing offer documentation and contracts through Springboard.

This partnership brings the following capabilities to Springboard:

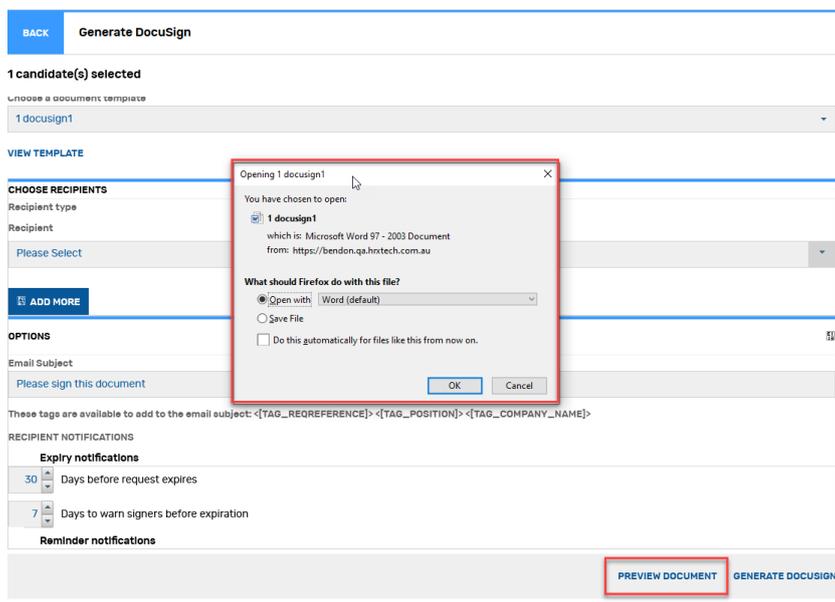
1. Convert your existing document library to DocuSign compatible documents and store in Springboard
2. Manually or automatically generate a DocuSign document and send to candidates for signing directly from Springboard
3. Setup approval workflows where multiple recipients receive and sign the document in order
4. Track document acceptances from a central management screen
5. View final signed documents and the Certificate of Compliance generated by DocuSign directly from Springboard.

This release provides the following features to make it easier to generate an offer letter or contract with DocuSign.

1. Preview the generate document before sending it to DocuSign
2. Upload your own document to send via DocuSign, providing the ability to make manual edits to the contract before sending it out.

Preview the document before sending

After selecting a letter from the Document library to send as an offer or Contract, click the 'Preview Document' button to preview what the document will look like with all Springboard candidate data inserted into the contract.

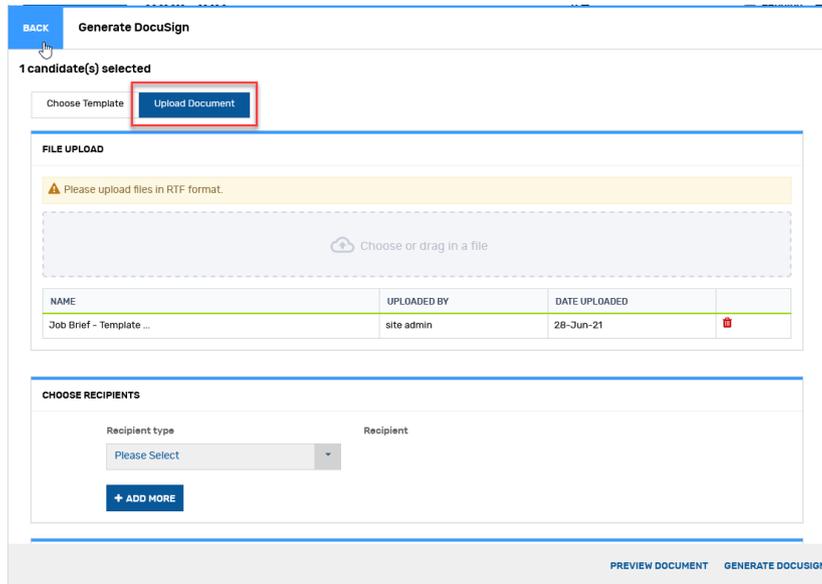


Upload your own document

You may wish to send an offer or contract to a candidate that is not in the document library.

Alternatively, you may wish to generate a rich letter in Springboard, make some minor edits or customisations to the letter offline, and then upload that document back into Springboard to send out via DocuSign.

To do this, select Upload Template under Generate DocuSign.



The screenshot shows the 'Generate DocuSign' interface. At the top, there is a 'BACK' button and the title 'Generate DocuSign'. Below this, it indicates '1 candidate(s) selected'. There are two buttons: 'Choose Template' and 'Upload Document', with the latter highlighted by a red box. The 'FILE UPLOAD' section contains a warning message: 'Please upload files in RTF format.' Below this is a dashed box for file upload with the text 'Choose or drag in a file'. A table below shows the upload history:

NAME	UPLOADED BY	DATE UPLOADED	
Job Brief - Template ...	site admin	28-Jun-21	

The 'CHOOSE RECIPIENTS' section has a 'Recipient type' dropdown menu set to 'Please Select' and an '+ ADD MORE' button. At the bottom right, there are links for 'PREVIEW DOCUMENT' and 'GENERATE DOCUSIGN'.

Talent Profiles – restrict which candidates who can register based on email

For clients looking to operate internal talent pools for mobility or redeployment, ideally only current employees should be able to register an account to the talent community.

With this release, a whitelist of email domains can be setup and maintained in the system

Join Our Talent Community

If you're not ready to apply, however want to be included in our search for future great candidates, please complete the required information below.

 Invalid email domain address

[Sign up with Facebook](#) [Sign up with Google](#) [Sign up with LinkedIn](#)

OR

Given name(s)

Family name

Email

Password

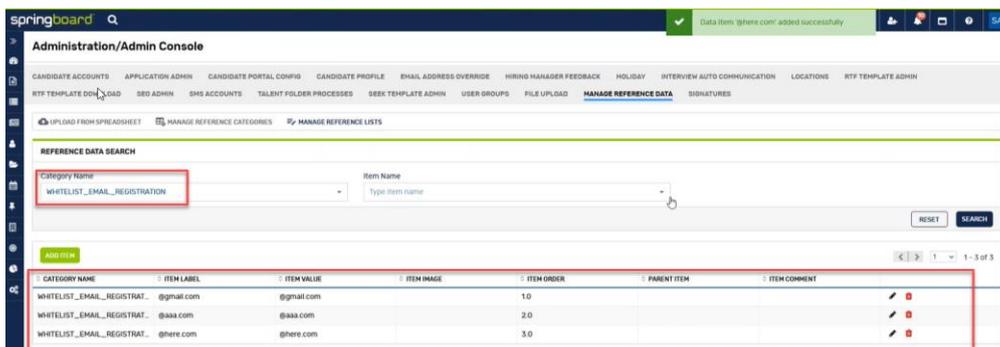
[Continue to your profile](#)

Already have an account?

Login to apply for roles, update your details or review your applications.

[Sign in](#)

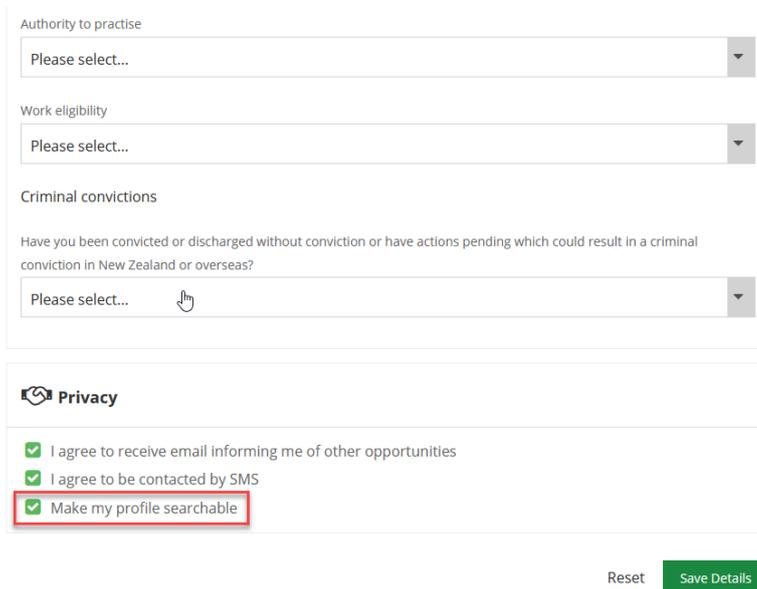
The whitelist of valid domains can be maintained by your administrator as a reference data category.



CATEGORY NAME	ITEM LABEL	ITEM VALUE	ITEM IMAGE	ITEM ORDER	PARENT ITEM	ITEM COMMENT
WHITELIST_EMAIL_REGISTRAT..	@gmail.com	@gmail.com		1.0		
WHITELIST_EMAIL_REGISTRAT..	@aaa.com	@aaa.com		2.0		
WHITELIST_EMAIL_REGISTRAT..	@here.com	@here.com		3.0		

Maintain whether a candidate can be found in the system

Candidates who register a candidate profile within a talent community can specify that they don't want their profile to be searchable by recruiters.



The screenshot shows a form with three dropdown menus: 'Authority to practise', 'Work eligibility', and 'Criminal convictions'. Below these is a 'Privacy' section with three checked checkboxes: 'I agree to receive email informing me of other opportunities', 'I agree to be contacted by SMS', and 'Make my profile searchable'. The 'Make my profile searchable' checkbox is highlighted with a red border. At the bottom right, there are 'Reset' and 'Save Details' buttons.

With this release, super users with sufficient privilege can also maintain this visibility setting on behalf of candidates.

This feature is useful if, for example, you are operating a talent pool of internal employees and an employee leaves the company. You may wish to restrict visibility to that candidate's profile.

You may then want to re-enable that candidate's profile should they re-join your company.

Set a candidate's profile to not searchable

Search for the candidate, edit their profile, and click the 'Visibility Setting' option. Users will no longer be able to find this candidate.

Barry Manilow
 Current Company: N/A
 Christchurch, Canterbury
 Past: N/A
 04076667

RESUME **PROFILE** APPLICATIONS COMMUNICATION FORMS ACTIVITY DOCUMENTS ONBOARDING EXPERIENCE

Source
 Source *
 Candidate Profile

Bio/Additional Notes
 Bio/Additional Notes
 4000 characters remaining.

Visibility Setting
 Searchable field

Work eligibility
 I am a New Zealand/Australian Citizen or Permanent Resident

Please provide further information about your Work Visa:
 Application Date
 Please select a date

Visa Type & NZIS client No.
 Have you been convicted or discharged in New Zealand or overseas?
 No

Please provide full details including date/s
 Do you agree with the above statements? Yes No

Find a candidate to make them searchable again

To re-enable searching on that candidate again, authorised super-users can still search for hidden candidates (whilst all other users cannot). On finding a returning candidate, switch the profile setting back to 'Visibility Setting'

Barry Manilow
 Current Company: N/A
 Christchurch, Canterbury
 Past: N/A
 04076667

RESUME **PROFILE** APPLICATIONS COMMUNICATION FORMS ACTIVITY DOCUMENTS ONBOARDING EXPERIENCE

Source
 Source *
 Candidate Profile

Bio/Additional Notes
 Bio/Additional Notes
 4000 characters remaining.

Visibility Setting
 Searchable field

Work eligibility
 I am a New Zealand/Australian Citizen or Permanent Resident

Please provide further information about your Work Visa:
 Application Date
 Please select a date

Visa Type & NZIS client No.
 Have you been convicted or discharged in New Zealand or overseas?
 No

Please provide full details including date/s
 Do you agree with the above statements? Yes No

Super user privilege only

Only users with a specific privilege can perform the above actions.

Tailor email content for recipients of multi-recipient forms

Multi-recipient online forms in Springboard are a great way to distribute a form for approval by multiple recipients within your organisation.

Recipient Type	Recipient	Read Only	Approval Type	Email Template
Candidate	Candidate	<input type="checkbox"/>	Submit Only	Form Approval
3rd Party	Smita	<input checked="" type="checkbox"/>	Accept/Reject	Form Approval
3rd Party	Aman Shah	<input checked="" type="checkbox"/>	Accept/Reject	General Form R

Springboard provides the ability to define as many approvers for the form as required, and each approver receives an email based on a template defined in the system.

Administration/App Comms

<[DHS_PLACEMENT_PREF3]> Preference 2: Preferred Placement Service

<[DHS_PLACEMENT_PREF4]> Preference 2: Preferred Office of Municipality

Email SMS

Flinders Port Holdings

Dear <[TAG_RECIPIENT_NAME]>.

Form Review Required

You have been sent a completed <[TAG_CUSTOM_FORM_NAME]> form for Review.

- Job Reference: <[TAG_JOBREFERENCE]>
- Candidate: <[TAG_CAND_FNAME]> <[TAG_CAND_LNAME]>

<[TAG_CUSTOM_FORM_URL]> and record your response

Kind regards,
Flinders Port Holdings Human Resources Team

Prior to this release, the email content for the 1st recipient could be customised or tailored after selecting the email template. However, the email sent to all other approvers could not be customised or tailored.

With this release, all approvers' email templates can be tailored in the system prior to sending the form.

JUSTMISE EMAIL

Email details

Email Template
Form Approval

Subject
Form Review Required for candidate <[TAG_CAND_FNAME]> <[TAG_CAND_LNAME]>

Body

B I U abc x, x² Font Size Format A- B- Source



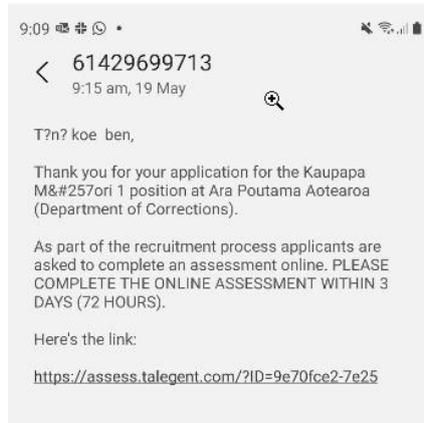
Dear <[TAG_RECIPIENT_NAME]>.

Form Review Required

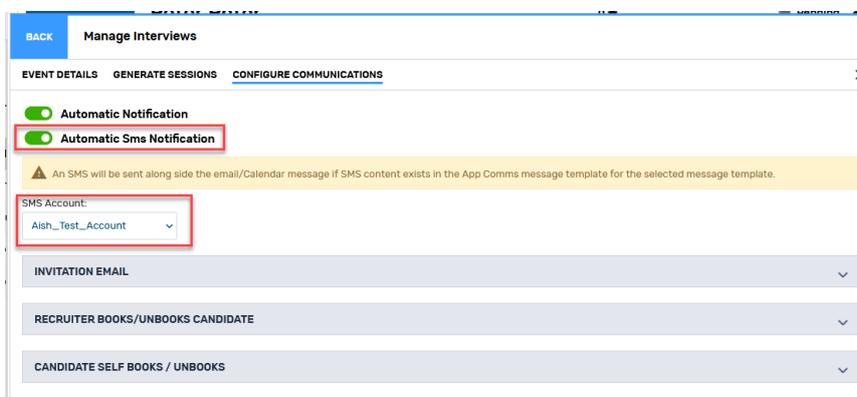
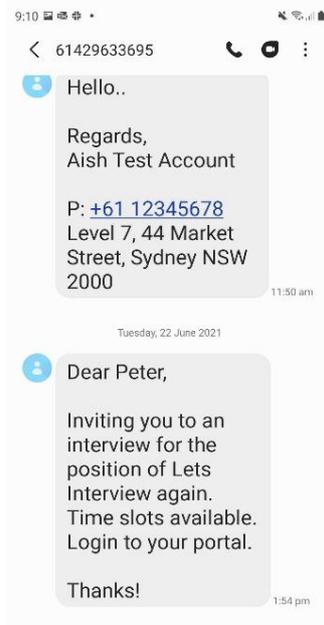
You have been sent a completed <[TAG_CUSTOM_FORM_NAME]> form for Review.

New SMS within the system

With this release, it is now possible to invite candidates to complete an online assessment via SMS.



Interview booking reminders can also be sent out via SMS





Peter Peter
Current Company: N/A
Location unknown
Past: N/A

0 ★ **Pending**
Enter your screening comments

0431403823 Create tags for this candidate.

RESUME PROFILE APPLICATIONS **COMMUNICATION** FORMS ACTIVITY DOCUMENTS EXPERIENCE

Search notes Communication Related to **Job** All
 Notes Emails SMS Feedback System Event Screening Comments

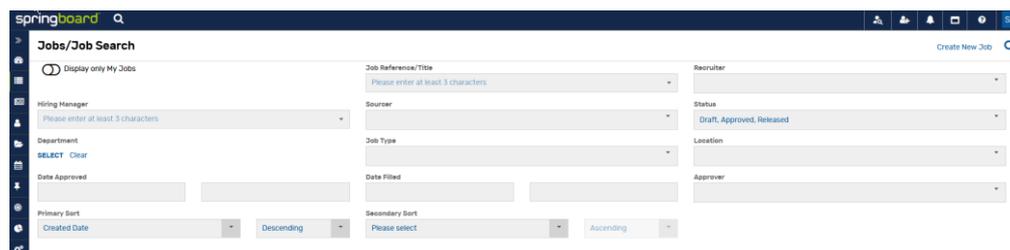
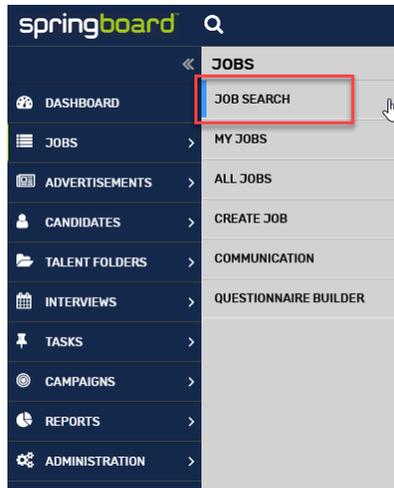
CL/1351109
Lets Interview again
Date Applied: 2021-06-01 10:51:52.0
Status: ACTIVE

- DD Default Default** 22-Jun-2021 13:54 CL/1351109
Recruiter Default Default sent:
Dear Peter,
Inviting you to an interview for the position of Lets Interview again. Time slots available. Login to your portal.
Thanks!
- DD Default Default** 22-Jun-2021 13:54 CL/1351109
Submitted SMS: Dear Peter,
Inviting you to an interview for the position of Lets Interview again. Time slots available. Login to your portal.
Thanks!
- SA site admin** CL/1351109

Access Job Search panel directly

It is now possible to access the Job Search panel directly, without first searching for 'All Jobs' or 'My Jobs'

To access, select Jobs -> Job Search

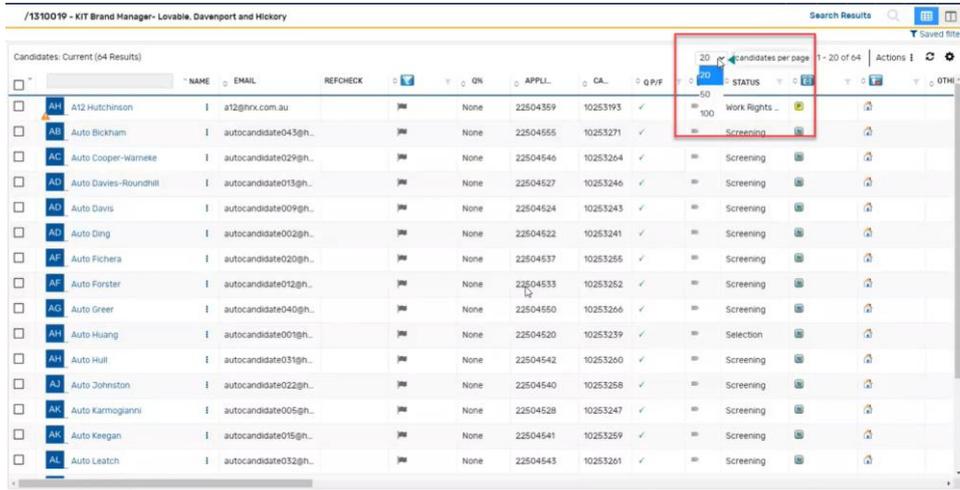


This feature is useful when looking for a specific job, and saves time loading the entire 'All jobs' menu first.

Increase the number of candidates per page, up to 100

It is now possible to increase the number of candidates displayed per page, increasing to 20, 50 or 100 candidates.

When a selection is made, that selection is remembered for that user from that point on.



The screenshot shows a web application interface for managing candidates. At the top, it displays the path "/1310019 - KIT Brand Manager- Lovable, Davenport and Hickory" and "Search Results". Below this, a table lists 64 candidates. The table has columns for NAME, EMAIL, REF CHECK, OR, APPL., CA., Q/P/F, and STATUS. A dropdown menu is open over the table, showing options for "candidates per page": 20, 50, and 100. The "100" option is selected. The table content includes the following data:

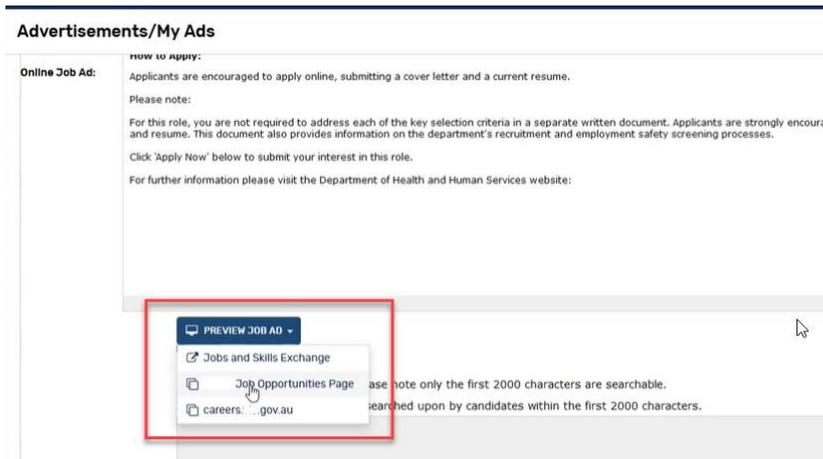
NAME	EMAIL	REF CHECK	OR	APPL.	CA.	Q/P/F	STATUS
A12 Hutchinson	a12@hnx.com.au		None	22504359	10253193	✓	Work Rights ...
Auto Bickham	autocandidate043@h...		None	22504555	10253271	✓	Screening
Auto Cooper-Warneke	autocandidate029@h...		None	22504546	10253264	✓	Screening
Auto Davies-Roundhill	autocandidate013@h...		None	22504527	10253246	✓	Screening
Auto Davis	autocandidate009@h...		None	22504524	10253243	✓	Screening
Auto Ding	autocandidate002@h...		None	22504522	10253241	✓	Screening
Auto Fichera	autocandidate020@h...		None	22504537	10253255	✓	Screening
Auto Forster	autocandidate012@h...		None	22504533	10253252	✓	Screening
Auto Greer	autocandidate040@h...		None	22504550	10253266	✓	Screening
Auto Huang	autocandidate001@h...		None	22504520	10253239	✓	Selection
Auto Hull	autocandidate031@h...		None	22504542	10253260	✓	Screening
Auto Johnston	autocandidate022@h...		None	22504540	10253258	✓	Screening
Auto Karmoghanni	autocandidate005@h...		None	22504528	10253247	✓	Screening
Auto Keegan	autocandidate015@h...		None	22504541	10253259	✓	Screening
Auto Leatch	autocandidate032@h...		None	22504543	10253261	✓	Screening

Preview a job advertisement within any selected sourcing channel

“Preview Job Ad” is a popular feature on the Job Advertisement posting screen, allowing a user to review what the job ad will look like on the careers site prior to posting it.

With this release, it is now possible to preview what the job ad will look like on multiple careers sites - useful for clients who post their job advertisement to several Springboard branded careers sites.

Click the ‘Preview Job Ad’ button. A dropdown of selected sourcing channels now appears.



The list of available careers sites to choose from is based on the sourcing channels already ticked for that job advertisement. Tick more sourcing channels to preview the job on other careers sites.

Note: Depending on security settings for the careers portal, some portals may open in a popup within Springboard, whilst others may open in a new tab in the browser.

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.

Career Site / Application Form

- Improvements to the file uploaded UI in the new application form & profile form.
- Improvements to the privacy statement control available on the candidate profile, forcing a candidate to read the privacy statement before accepting it
- When a candidate withdraws their application and provides a reason of 'Other', provide ability to capture a reason as free text.
- Improve timezone handling of date fields on the new application form
- Improve auto-scrolling of the new application form when a candidate hasn't completed all mandatory fields.

Candidate Management

- For clients using the new application form, ability to define application form field visibility specifically for bulkprints being generated.
- Fixed an issue that would cause multi-recipient forms to not be viewable by some approvers
- Improvements in the configuration of the candidate Onboarding module to allow for different visibility settings for multi-agency clients
- Fix an issue where questionnaire results were not visible for new application forms for recruiters to view
- Improve the registration of new talent community profiles so that users who have previously accessed the portal from a browser don't get stuck trying to register a new account.
- Add a missing scroll bar to the 'Request 3rd Party Assessment' action which made it difficult to request some assessments.
- Add hint text to the XRef 3rd Party Assessment action to guide users that the recruiters email address must be validated with XRef.

Job / Job Ad Management

- Include 'Position Number' into the (i) Information popup on the My Jobs and My Job Ads dashboard popups.

Automation

- Calendar Reminder rule - Increase the number of days option available for selection
- Fix an issue where Calendar Reminder rules would not work under specific circumstances.

Hiring Manager Feedback

- Improve automatic HMF generation to send only once a candidate is booked into an interview
- Provide more descriptive names for documents in the Documents tab of the HMF portal

Communications

- Add support for new address tags in App Comms emails
- Fix an issue with the CC email field in interview confirmation emails

Interview Scheduler

- Provide a Preview option to preview email templates that will be sent to candidates when scheduling an interview
- Resolve an issue where some interview booking confirmation calendar requests were not being received.

Administration

- Fix Candidate Useraccounts administration screen so that 'Unlink' SSO account option works in V7
- Improvements to Reference Data Administration module to manage ITEM1 and ITEM2 values
- Ability to scroll in Process Designer when there are a large number of workflow steps.
- Resolve an issue with the management of Application Statuses