

# Ad hoc New Release items - March 2023

Helping you to get the most out of Tribepad.



## Contents

Overview	3
Auto trigger integrations	3
Second prompt on onboarding force complete	5
Download button on application summary	7
Capture county	8
Permissions to hide career and education on the mini profile	8
The function to email a CV on application added to job templates	9
Download list now includes candidate ID	9



# Overview

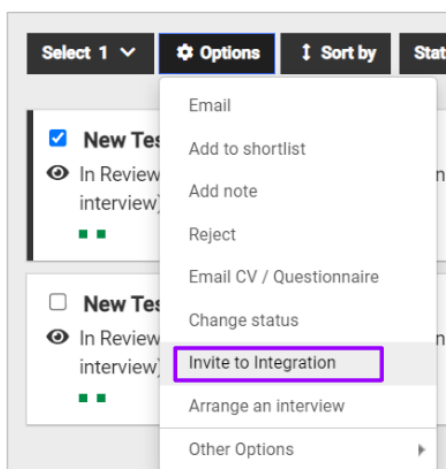
This document contains details of all 'ad hoc' items that have been included in the March 2023 New Release. These items are all minor amendments or upgrades to the ATS and so therefore do not warrant their own documentation as there is very little to explain!

Most of these features will be switched on for all customers as part of the release.

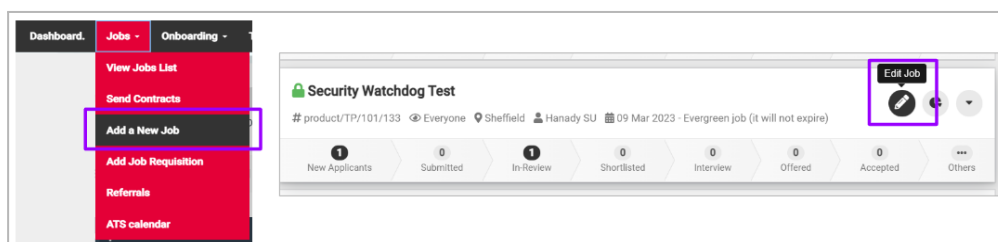
## Auto trigger integrations

This has been already switched on for all customers as part of the March 2023 release.

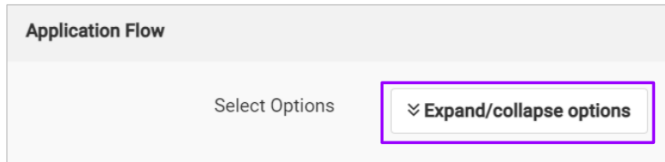
- If you use Integrations in your organisation, it has previously not been possible to 'auto trigger' integrations - they have had to be manually triggered by using the 'invite to integration option' on the Options menu within a job:



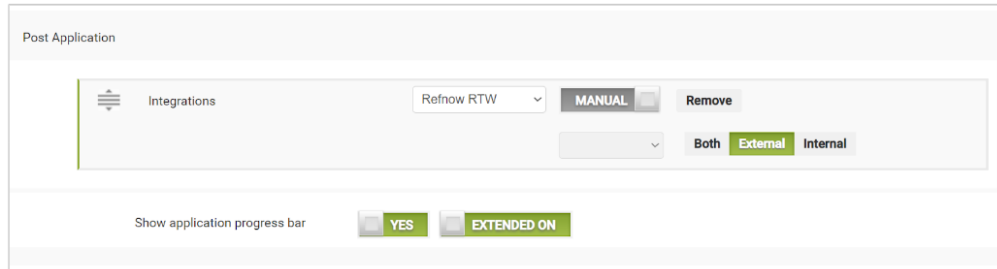
- Now, you are able to automatically trigger an Integration post-application (i.e. when the candidate has submitted their application)
- To do this, go to your Job Create process. This can be done on an existing job and also a brand new job



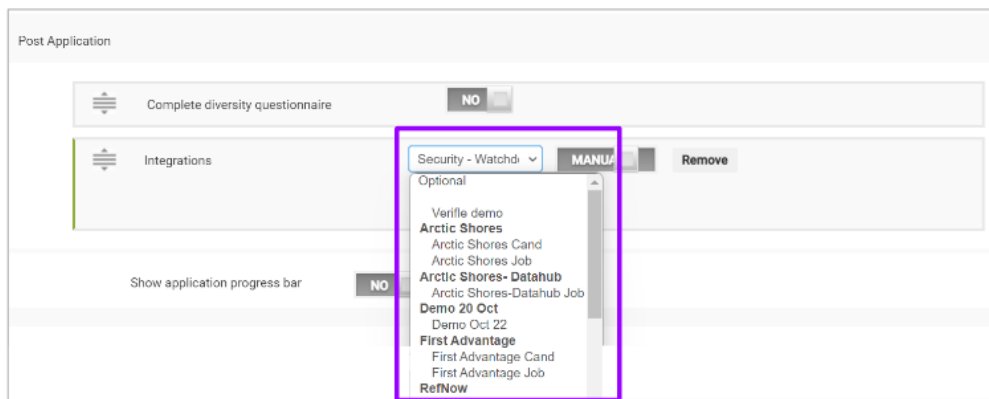
- Scroll down the page to the 'Application Flow' section and click on the 'Expand/Collapse options' button:



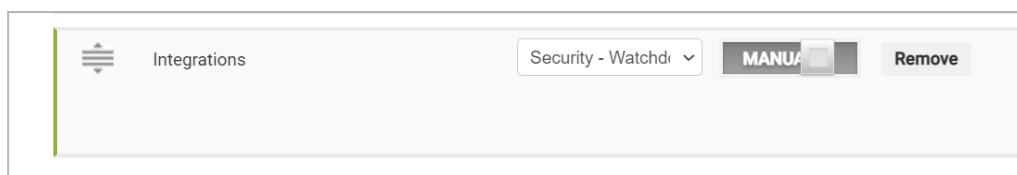
- Scroll down to the 'Post Application' section



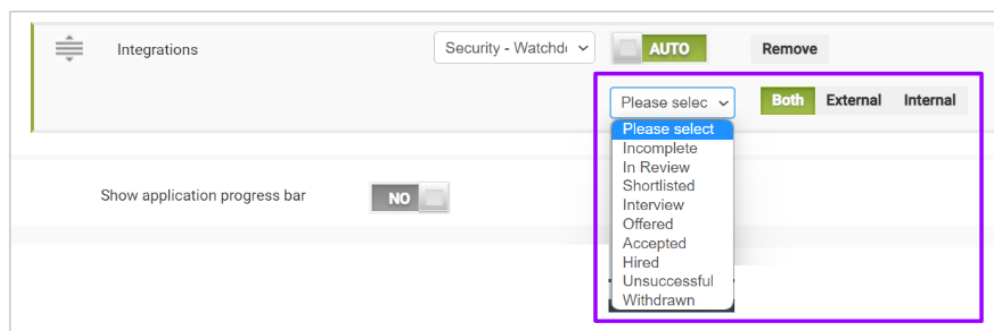
- From here you can select the relevant Integration from the drop-down list:



- You can also choose if the integration is triggered automatically or manually, by using the toggle option:



- If you move the toggle to 'Auto', you will be presented with further options:

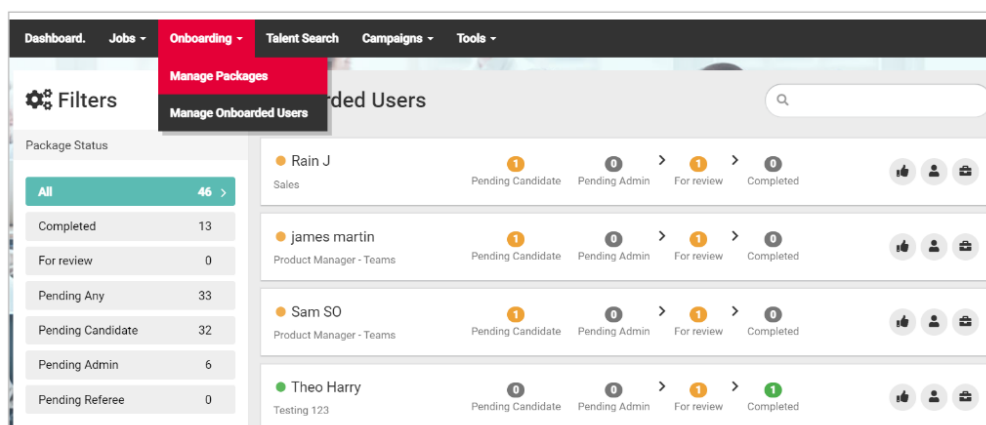


- Select the stage of the application process when you would like the Integration to be triggered
- Also choose which candidates should be sent the Integration to complete
  - o External candidates
  - o Internal candidates
  - o Both

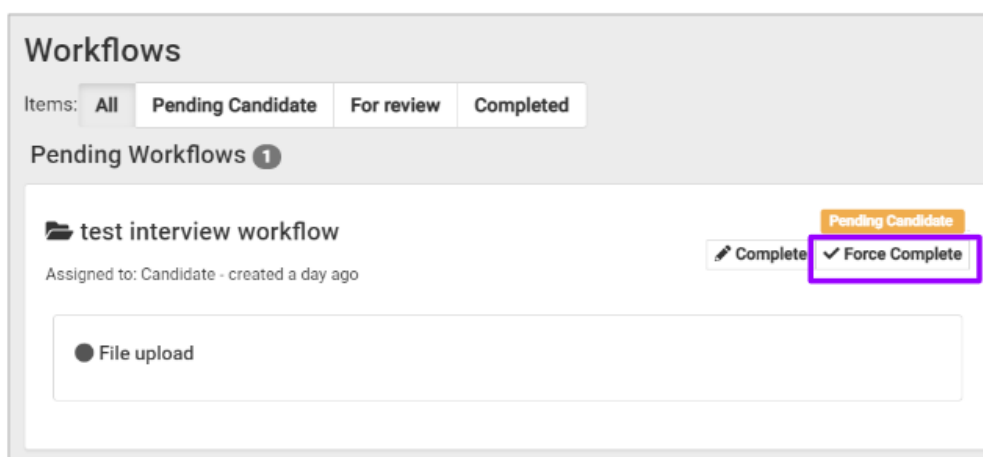
**Please note** - this does not take into consideration any application stages that may have been renamed in the Manage tool - this drop-down list will show Tribepad standard stages such as In-review, Shortlist etc.

## Second prompt on onboarding force complete

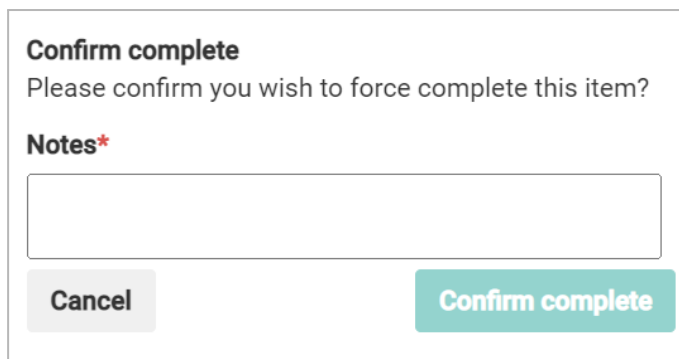
- In Onboarding, you are able to manage candidates going through the process, through the 'Manage Onboarded Users' section of the ATS.



- You have been able to 'Force Complete' a candidate's workflow item if required, i.e. make the platform think that the workflow item has been completed:



- This button has never had a 'second prompt' and the action has been completed instantly.
- Now, when selecting this option, you will be presented with a secondary prompt:

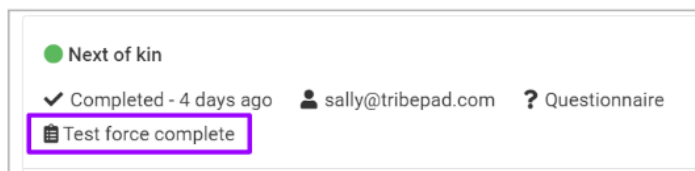


**Confirm complete**  
Please confirm you wish to force complete this item?

**Notes\***

**Cancel** **Confirm complete**

- You will need to leave a note relating to the action you are performing and then select 'Confirm Complete'.
- This should stop users completing workflow items they did not mean to
- The functionality works in the same way as before, but with this additional option
- This is not reported in insights, but the reason for the completion is displayed against the workflow item:



● Next of kin

✓ Completed - 4 days ago   sally@tribepad.com   ? Questionnaire

🗑️ Test force complete

**Please note** - the 'Force Complete' function will be removed from our new checklist items. These will need to be accepted/rejected if approval is needed.



## Download button on application summary

- This is an option that has been available for our customers for a little while
- It is a feature that needs to be requested to be turned on, and allows you to download a candidate's application from the Application Summary page:

### Summary of the completed application for job: IT Security Apprenticeship


**Personal Information**


Title: Mr  
First name: James  
Last name: Dean  
Mobile Number: +447480773178  
Alternative email address: James.dean@yopmail.com  
Address: 10, Queens Road, Ryde, PO33 3BG, United Kingdom

**Education History**

*i* No information has been added for this section.

**Uploaded CV**

File type	File name	Options
	James Dean.doc	<a href="#">Download</a>

[Go to Dashboard](#)  [Withdraw application](#)

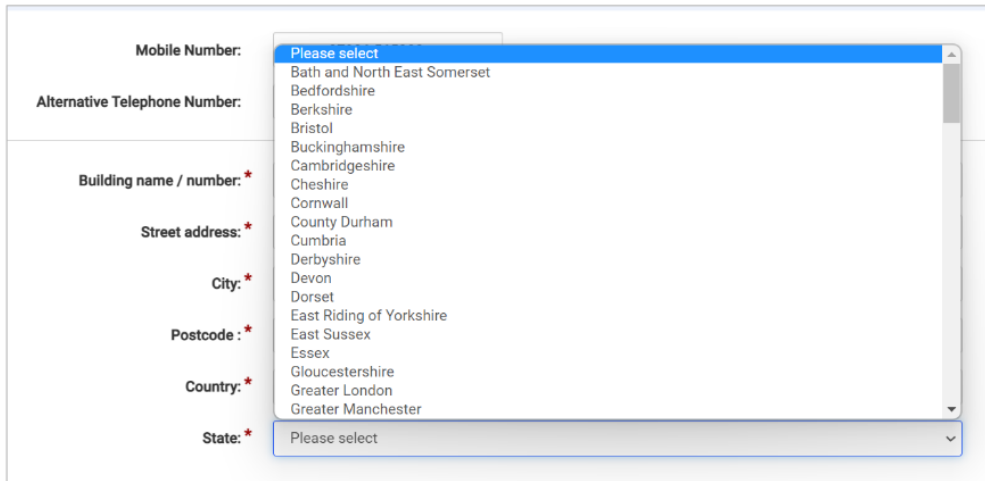
- The permission to request if you would like this feature, is the 'Download application summary PDF'..



## Capture county

This has been already switched on for all customers as part of the March 2023 release

- This allows you to capture a candidate's county at application stage
- This works in the same way as the state works when candidates select USA



The image shows a form with several fields. A dropdown menu is open, displaying a list of counties. The fields are: Mobile Number, Alternative Telephone Number, Building name / number (with a red asterisk), Street address (with a red asterisk), City (with a red asterisk), Postcode (with a red asterisk), Country (with a red asterisk), and State (with a red asterisk). The dropdown menu is currently open, showing a list of counties: Bath and North East Somerset, Bedfordshire, Berkshire, Bristol, Buckinghamshire, Cambridgeshire, Cheshire, Cornwall, County Durham, Cumbria, Derbyshire, Devon, Dorset, East Riding of Yorkshire, East Sussex, Essex, Gloucestershire, Greater London, and Greater Manchester. The 'Please select' option is highlighted at the top of the dropdown.

- The drop-down lists all of the counties which are available when a candidate selects UK as the country
- The county list is hard coded
  - This means that you cannot amend the list in Manage like other drop-down lists.

## Permissions to hide career and education on the mini profile

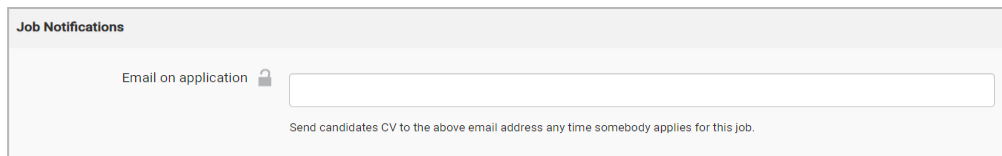
- You may wish for certain items on a candidate's profile to be hidden from view for certain user types within your platform
- You can now request that the Career history and Education history are hidden within the platform for certain user types.
- If you wish to request these, the permissions you should request are
  - **Candidate Management** > Hide career history in the mini profile
  - **Candidate Management** > Hide education history in the mini profile





## The function to email a CV on application added to job templates

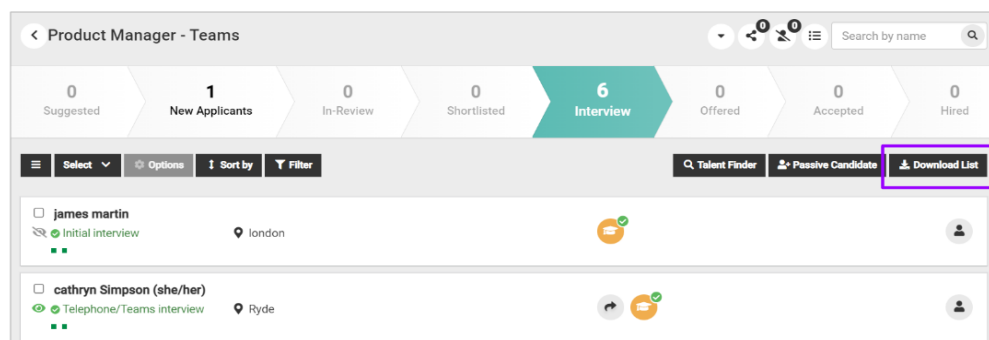
- In the 'Job Create' process you have been able to add an email address that will receive Tribepad generated CVs from candidates, whenever an application is received into the platform
- This function has now been added to Job templates:



- This feature is available on request.

## Download list now includes candidate ID

- Within a Job Flow, you have the ability to download a list of candidates at any point in the application process:



- Previously, this list did not include a candidate ID
  - If you were using the Anonymisation feature where the candidate is assigned a number (e.g. 'Candidate 52'), there was no way to link that candidate to their actual details
- We have now added in a Candidate ID column, so if anonymisation is on, the candidates can still be linked back to their application:



	A	B	C	D	E	
1	Candidate ID	Forename	Surname	Alternative email address	Mobile Number	Altern
2	289	james	martin	jamesmartin7867@y	+447123123123	
3	255	cathryn	Simpson	cjanebuffy@gmail.c	+447578519786	
4	259	Sam	SO	samso@yopmail.com	+447555555555	
5	285	warren	taylor	warentaylor375@yo	+447123123123	
6	261	les	miller	lesmiller376@yopm	+447123123123	
7	258	david	miller	davidmiller468@yop	+447123123123	

