



Fairsail St Gabriel Release: Overview

© Fairsail 2015. All rights reserved.

This document contains information proprietary to Fairsail and may not be reproduced, disclosed, or used in whole or in part without the written permission of Fairsail.

Software, including but not limited to the code, user interface, structure, sequence, and organization, and documentation are protected by national copyright laws and international treaty provisions. This document is subject to U.S. and other national export regulations.

Fairsail takes care to ensure that the information in this document is accurate, but Fairsail does not guarantee the accuracy of the information or that use of the information will ensure correct and faultless operation of the service to which it relates. Fairsail, its agents and employees, shall not be held liable to or through any user for any loss or damage whatsoever resulting from reliance on the information contained in this document.

Nothing in this document alters the legal obligations, responsibilities or relationship between you and Fairsail as set out in the contract existing between us.

This document may contain screenshots captured from a standard Fairsail system populated with fictional characters and using licensed personal images. Any resemblance to real people is coincidental and unintended.

All trademarks and service marks mentioned in this document belong to their corresponding owners.


FS-STG-XXX-RNO-201503--R011.00

About this Release Note Overview

This Overview provides a summary of the Fairsail St Gabriel Release. You can find the full Release Notes here:

help.fairsail.com

Release Summary

Feature	No setup	Collab. Portal	HR/Recruit Manager Portal	HR/Recruit Admin.	Contact Fairsail
Click the link to jump to full description.					
 See the guide for related information.		Switchable	Setup	Setup	
	Note 1	Note 2	Note 3	Note 4	Note 5

Major functional enhancements

Fairsail WX

Initial launch of Workforce Experience, the greatly enhanced end user interface to Fairsail (see page 7)



 [Fairsail WX Configuration Guide](#)  [Fairsail WX Guide for Users](#)

Recognition

New social performance management process.



 [Fairsail WX Configuration Guide](#)  [Fairsail WX Guide for Users](#)

Action Roles

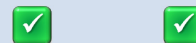
Create roles as recipients for Action Emails and assign them to HR Departments and Work Locations (see page 8).



 [Fairsail HCM Configuration Guide](#)

e-Signature & Expert Confirmation for Skills & Job Description Changes

Add auditable authentication to Team member changes (see page 8).



 [Fairsail HCM Configuration Guide](#)  [Fairsail HCM: Guide for HR Managers](#)


Future Dates for Salary Changes

Activate future dated salary changes on their start dates (see page 9).



 [Fairsail HCM Configuration Guide](#)

Feature	No setup	Collab. Portal	HR/Recruit Manager Portal	HR/Recruit Admin.	Contact Fairsail
<p>Click the link to jump to full description.</p> <p> See the guide for related information.</p>		Switchable	Setup	Setup	
<p>External Competency Assessment</p> <p>Nominate people outside your organization as assessors (see page 9).</p> <p> Fairsail HCM Configuration Guide</p>					
	 Fairsail Collaboration Portal: Guide for Users				
<p>Salary Change Reason copied from HR Request</p> <p>HR Requests for a salary change use the change reason to update the Salary record. (see page 9)</p> <p> Fairsail HCM Configuration Guide</p>					
<p>Skype Interviews Through Recruit</p> <p>Clickable link on Candidates page to start a Skype call (see page 10).</p> <p> Fairsail Recruit: Guide for Administrators</p>					
	 Fairsail Recruit: Guide for Recruiters				
<p>Multiple Monster Account support</p> <p>Integrated support for up to 10 Monster Job Board accounts (see page 10).</p> <p> Fairsail Recruit: Guide for Administrators</p>					
	 Fairsail Recruit: Guide for Recruiters				
<p>Reminder Emails for Waiting Approvals</p> <p>Recruit sends reminder emails to users with pending approvals (see page 10).</p> <p> Fairsail Recruit: Guide for Administrators</p>					
	 Fairsail Recruit: Guide for Recruiters				
<p>DocuSign for Offer Letter</p> <p>Use DocuSign to send PDF offer letters and return signed copies to Fairsail (see page 10).</p> <p> Fairsail Recruit: Guide for Administrators</p>					
	 Fairsail Recruit: Guide for Recruiters				
<p>Internal Portal Enhancements</p> <p>Improved visibility of vacancies and more options for Hiring Managers (see page 11).</p> <p> Fairsail Recruit: Guide for Administrators</p> <p> Fairsail HCM Configuration Guide</p>					
	 Fairsail Recruit: Guide for Recruiters				

Feature	No setup	Collab. Portal	HR/Recruit Manager Portal	HR/Recruit Admin.	Contact Fairsail
Click the link to jump to full description.  See the guide for related information.					
		Switchable	Setup	Setup	

Record/Loop Counter for Payflow

Use named counters for improved data tracking during download (see page 12).



Fairsail Payflow Implementer's Guide

Other enhancements**Increased file size limit for SFTP transfers**

Files over 3MB now transfer without issue (see page 12).



Fairsail Payflow Technical Implementation Guide

Further Payflow enhancements

Second Select field for downloads to enable refined filtering (see page 12).



More Start & End Date options for Downloads (see page 12).



Uploads to Boolean fields now supported (see page 13).



Fairsail Payflow Implementer's Guide

Notes

1. Features are present and require no setup to use.
 2. Features appear in the Collaboration Portal and can be switched on or off using a Policy setting.
 3. Features appear in the HR Manager Portal or the HR Recruit Portal and can be configured.
 4. Features are available to the HR or Recruit Administrator and require configuration.
 5. Contact Fairsail if you wish to use these features.
- **No new features force you to use them.**
 - **Choosing to use the new features can greatly enhance your Fairsail experience, but you can continue to use your existing system in its current form.**
 - **None of your customizations are affected.**

Fairsail WX Overview

Fairsail WX adds new features to the Fairsail system:

- WX Service

The top level grouping comprising one or more WX Processes. For example, a Performance Management Service with component Processes for Objectives, Recognition, and Performance Review. You have complete flexibility when naming WX Services - choose names and groupings of Processes that make sense within your organization.

WX Services are displayed to Team Members through the WX Navigation Bar and Service Bar.

- WX Process

Individual processes mapping to specific Fairsail processes and grouped into WX Services. As with WX Services, you can name a WX Process to suit the requirements of your organization. Each WX Process has a summary Tile view, and most also have a Detail view.

You can include one Process in one or more WX Services, making a Process easier to find. For example, include a Skills Process in:

- A Skills & Competencies Service
- A Performance Management Service
- A Career Planning Service

WX Processes are displayed nested within WX Services in the Navigation Bar, with summary views displayed in Tiles and Detail in the main page view.

- Internal Communication

A powerful and adaptable type of WX Process, enabling you to create broadcast, or more tightly targeted communications in a range of formats including:

- Raw Text.
- External website, enabling you to provide easy access to external resources and feeds from third party systems (subject to your organization's security policies).
- Video, useful for high impact messaging.

Build a library of Internal Communications and assign them to WX Services as you would any other WX Process.

Create local language versions of Internal Communications and associate each with a locale setting; Team Members with matching locale settings then see the localized version of the Internal Communication.

Use Internal Communications for surveys seeking feedback, storing responses for analysis.

- Recognition

A type of WX Process enabling your Team Members to award visible and immediate positive feedback to others. Typically aligned with the core competencies or values defined for your organization, Recognition integrates social performance management with the rest of the Fairsail system.

Configuring the new features follows standard Fairsail practice; you need access to the Administration settings available through the HR Manager Portal where you can find new tabs for WX Services and Internal Communications.

If you are upgrading an existing HCM org to the latest WX release, you may have to change some configuration settings.

Action Roles

Apply Action Roles to key people in an HR Department or location, then use those roles as recipients for Action Emails.

- Action Roles can be linked to Fairsail Users or to external email addresses.
- You can define as many Action Roles as you need and name them to match your organization's requirements.

Example

A company has a single Facilities contact in each of its eight office locations. Facilities are responsible for new hire arrangements for access to buildings, desk allocation, and health and safety briefings. You set up a Facilities Action Role and add that Role to the Work Locations for each of the eight offices, specifying a Fairsail User at each location to act as the Facilities contact. You then define an Action Email with a list of actions for a New Hire, to be sent to the Facilities Action Role at the relevant Work Location two weeks before each New Hire start date.

Auditable e-Signatures for Skills and Job Description Changes

Ensure:

- New Skills added to Team Member records are approved by managers or an approver with the desired level of skill.
- Approvers for amendments to Skills and Job Descriptions are asked to confirm their login credentials to meet legal and audit requirements.

Future Dates

When setting a new salary for a Team Member, either for a new Team Member or as a new salary record for an existing Team Member, you can ensure that the new salary does not become active until the start date with two configuration settings.

When set up:

- A daily batch runs to set new items Active on their start dates.
- New items are only set Active if the start date is today or in the past.
- The Current Salary field on the Employment Record continues to report the salary active today, until the new salary is activated on the start date.
- Amendments to an existing Current Salary record are immediately visible even if the record start date is amended to a future date - if you want a salary award to apply from a future date, create a new salary record with the correct Start Date.

Salary awards from a finalized HR Request or New Hire are treated as new items and processed by the daily batch run.

External Competency Assessors

You can nominate assessors outside your organization to take part in a Competency Assessment for a Team Member. External assessors are sent an email with a link to the assessment questionnaire. The questionnaires are completed using Salesforce Sites.

Setup is a three stage process:

1. Add the Visualforce page **AssessmentExternal** to the Site pages.
2. Add required objects to give Read/Edit access for the Sites User: click Public Access Settings on your Site.
3. Select the type of Assessor you want to use in the Policy, Competency Assessment section.

Salary Change Reason copied from HR Request

When completing an HR Request for a Team Member, a manager can select the primary reason for the request, such as promotion, job change, or cost of living. Changes relating to the Team Member's salary use the reason entered on the HR Request to populate the Change Reason field on the Salary record, if Change Reason contains a matching value. The value is copied when the HR Request is finalized.

Skype Interviews through Recruit

Add a Candidate's Skype Name to their Contact Information to create a **Skype Call** link on the Candidates Home page. When you want to initiate a Skype call with the Candidate, click the link.

Multiple Monster Account Support

Fairsail supports up to 10 different Monster accounts for a single org, enabling vacancies to be posted to job boards for specific countries and regions. Tailoring vacancy posting to country and region enables you to seek applications from a smaller, regionally appropriate talent pool, increasing the potential value of applications received, and reducing hiring manager time spent.

Reminder Emails for Waiting Approvals

Fairsail Recruit can now be configured to send reminders to approvers with pending vacancy approvals. You can define the number of days between reminders and the time of day at which they are sent.

DocuSign for Offer Letter

You can use DocuSign to ease the process of offer letter issue and return. DocuSign acts as a host for the letter and manages the e-signature process safely and securely. You must have an existing DocuSign account - or create one - to use this process.

The outline process is:

1. Connect your existing DocuSign account with your Salesforce account.
2. Configure Recruit External APIs to enable DocuSign use.
3. Use the **Email Offer with DocuSign** link to send the Offer Letter to Candidate.
4. The Candidate receives a link to the offer letter in DocuSign.
5. The Candidate signs the Offer Letter through DocuSign and selects Finish.

The signed Offer is added as an attachment to Fairsail and the Offer Signed Date field is populated.

Internal Portal Enhancements

Hiring Managers now have an extended range of options:

- The Hiring Manager Portal, displayed in the Collaboration Portal beneath internal vacancies from Fairsail Recruit, shows all open Vacancies for which the Team Member is the Hiring Manager:

▼ Current Vacancies	
Vacancy Name	Vacancy No
Sales Manager West	VN003
Sales Manager Canada	VN017
Sales Manager New York	VN023

Information displayed is controlled by Field Set. Select a Vacancy Name to display the details for that Vacancy, including all active applications.

- Access to all Applications for all Vacancies for which they are the Hiring Manager.
- More control over the assessment process for Hiring Managers:
 - The option to assess all stages of a selection process for their Vacancies.
 - The ability to control the outcome of a selection stage they are assessing.
 - The option to specify the start details to be entered on the appropriate assessment page.

To configure Hiring Manager options:

1. In the Policy for the Hiring Manager, select Hiring Manager Is Active.
2. Define the fields displayed in the Collaboration Portal list and in the detail page for a Vacancy selected from the list.
3. Define the fields displayed in the list of Active Applications for a Vacancy, and to define the Start Details fields required.
4. On the Fairsail Recruit Configure page, select the options you want for access to Applications and for Assessment.

If you do not want to use the Configure options to make global settings, you can use the **Show To Hiring Manager** and **Is Hiring Manager Stage** settings when defining Selection Stages for individual Vacancies.

5. Define the editable fields displayed to the Hiring Manager on the Assessment page.

Record/Loop Counter for Payflow

You can now add named counters for loops or record types to improve data tracking for downloads.

A counter is simply a text string entered in the last field of a record along with the New Loop After or New Record After marker. Payflow then counts the number of loops or records of that type. Use the Counter in a formula to return the number of records carrying the string.

Increased File Size Limit for SFTP Transfers

Previously, the maximum file size for SFTP transfer was 3MB. With the St Gabriel release files up to the maximum size that can be generated by Payflow can be handled for SFTP transfer. The maximum Payflow file size is 12MB, imposed by the Salesforce maximum heap size.

- Files are split into multiple component files, each of 2MB.
- A PowerShell script reassembles the component files on receipt by the SFTP Server.

You can also edit the PowerShell script to push files to a different server.

More Start & End Date Options for Payflow Downloads

As an alternative to using regular payroll periods to determine the start and end dates for a download, you can set a start date as a number of days in the past, and an end date as a number of days in the future.

The dates you set are then used to select the objects for the download - salary, benefits and so on.

Second Select Field for Downloads

When defining the records you want to download from Payflow you can now specify two fields within a group that must both agree with the values you give before a record is included in a download. Select Field 2 and Select Value 2 are both added to the Download File Specification.

Uploads to Boolean Fields

When uploading data to Fairsail through Payflow, you can now include Boolean (True/False) field types.

A

About this Release Note Overview • 3

Action Roles • 4, 9

Auditable e-Signatures for Skills and Job Description Changes • 4, 10

D

DocuSign for Offer Letter • 5, 17

E

External Competency Assessors • 4, 12

F

Fairsail WX Overview • 7

Future Dates • 4, 11

I

Increased File Size Limit for SFTP Transfers • 6, 20

Internal Portal Enhancements • 5, 18

M

More Start & End Date Options for Payflow Downloads • 6, 21

Multiple Monster Account Support • 5, 15

R

Record/Loop Counter for Payflow • 5, 19

Release Summary • 4

Reminder Emails for Waiting Approvals • 5, 16

S

Salary Change Reason copied from HR Request • 5, 13

Second Select Field for Downloads • 6, 22

Skype Interviews through Recruit • 5, 14

U

Uploads to Boolean Fields • 6, 23