

# Onboard

*Design Specifications v1.0*

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# 1 Introduction

## 1.1 Product Overview

Onboard is a web tool designed to expedite companies' recruiting, screening, interviewing, and onboarding processes. It is being developed by a five-person team at the University of California, Santa Barbara under the guidance of Ross Hale from Pivotal Labs. Applicants to a job will be able to submit resumes and pertinent application data to Onboard using a web interface or via email. Onboard will then create a profile for an applicant that stores their information and progress throughout the onboarding process. Recruiters, interviewers, and hiring managers will be able to access the profile and manage applicant profiles to track their progress through the onboarding process.

## 1.2 Definitions, Acronyms, and Abbreviations

Please refer to the Glossary (Section 6.0.0) at the end of this document.

# 2 Components

## 2.1 Cloud Foundry

The Platform as a Service for web application hosting. The production server for OnBoard will be deployed on Cloud Foundry for non-developer use.

<http://www.cloudfoundry.com/>

## 2.2 PostgreSQL

The object-relational database management system used to persist all data submitted to and generated by Onboard.

<http://www.postgresql.org/>

## 2.3 Ruby

An interpreted programming language that is commonly used for web development. Most commonly used in combination with the Rails framework for web design - see below.

<https://www.ruby-lang.org/en/>

## 2.4 Ruby on Rails

A web development framework for Ruby. It provides many built-in features for rapid web application development and enforces strict use of the Model-View-Controller infrastructure.

<http://rubyonrails.org/>

## **2.5 Twitter Bootstrap**

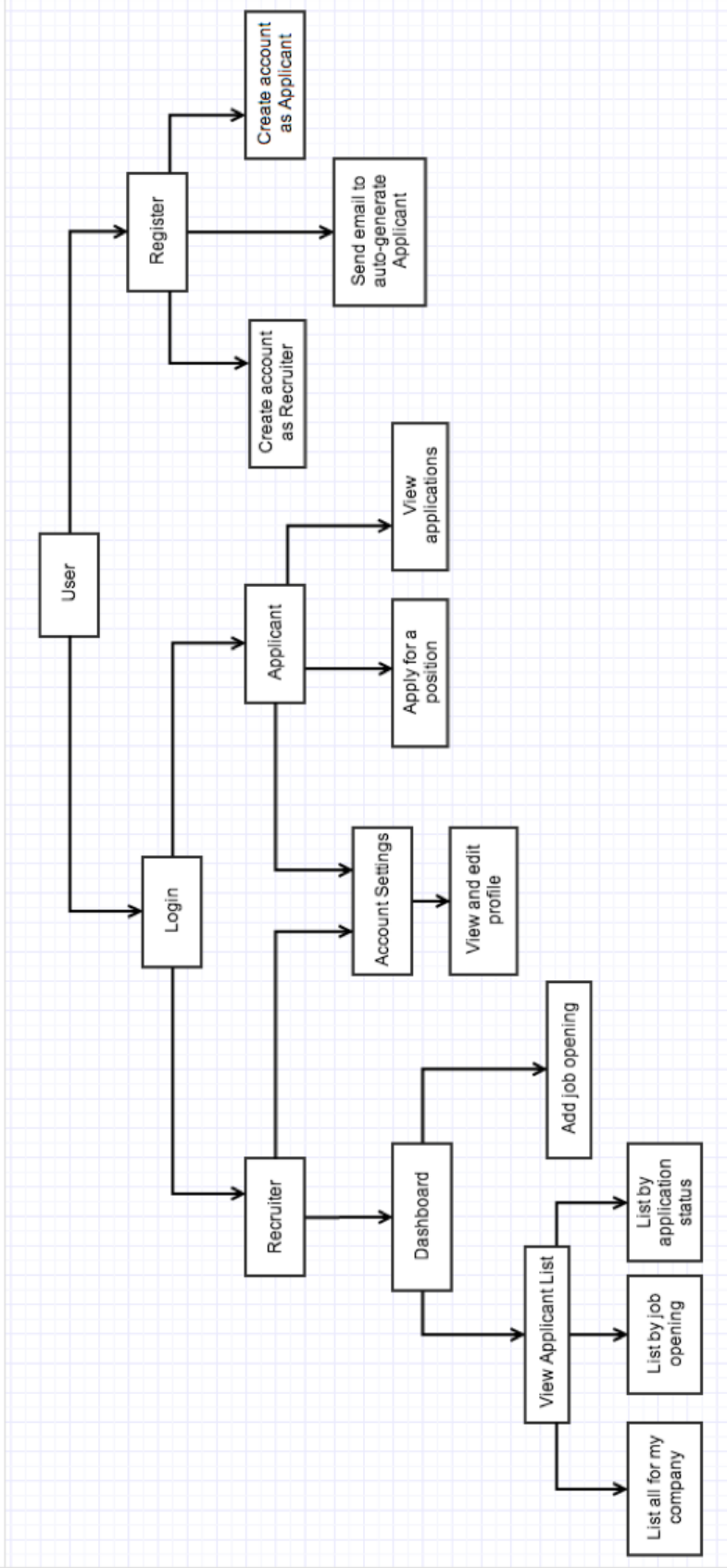
Open source CSS file structure to be used as a starting point for web applications. It provides good out-of-the box aesthetics for webpages, many premade CSS class definitions, and is easily customizable.

<http://getbootstrap.com/2.3.2/>

# **3 Design Specifications**

## **3.1 High-Level Overview**

A company will set up an account on OnBoard. Each company has at least one HRAdmin user who can manage account creation for recruiters, add job openings, and assign recruiters to job openings. A recruiter assigned to a job opening is responsible for filling that position. A prospective job applicant can apply to job openings for a company via a web or email interface. Using the web interface, an applicant can create an account, view job openings, and submit applications. Recruiters are associated with job openings, and can view applications submitted for those openings. The recruiters can also view applicant profiles associated with applications they are responsible for. Recruiters will also be able to add notes to an applicant's profile or application during the application process and track an applicant's progress in the interviewing/onboarding process.



## 3.2 Detailed Design

### 3.2.1 Account generation

Onboard will support three user roles: applicants, recruiters, and HRAdmin. An HRAdmin can manage all aspects of a company account, including creation of recruiters and job openings. Applicants can create their own accounts from which they can submit applications to specific company job openings.

### 3.2.2 Successful Account Registration

Account credentials are persisted in the database and the user is redirected to the login page. At this point the user can enter in the credentials for the account they've just created in order to log in.

### 3.2.3. Unsuccessful Account Registration

If registration is unsuccessful, a flash message will appear at the top of the screen alerting the User to all errors in the submission. Errors include blank fields, an invalid email address, or account email already taken. The User will then be able to fix their submission and make another attempt at registration.

**ONBOARD** [sign in](#) [register](#)

## Sign up

2 errors prohibited this user from being saved:

- Email has already been taken
- Password can't be blank

Select Role  
Recruiter

First name  
First name

Last name  
Last name

Email  
recruiter@recruiter.com has already been taken

Password  
Password can't be blank

Password confirmation  
Confirm password can't be blank

Submit

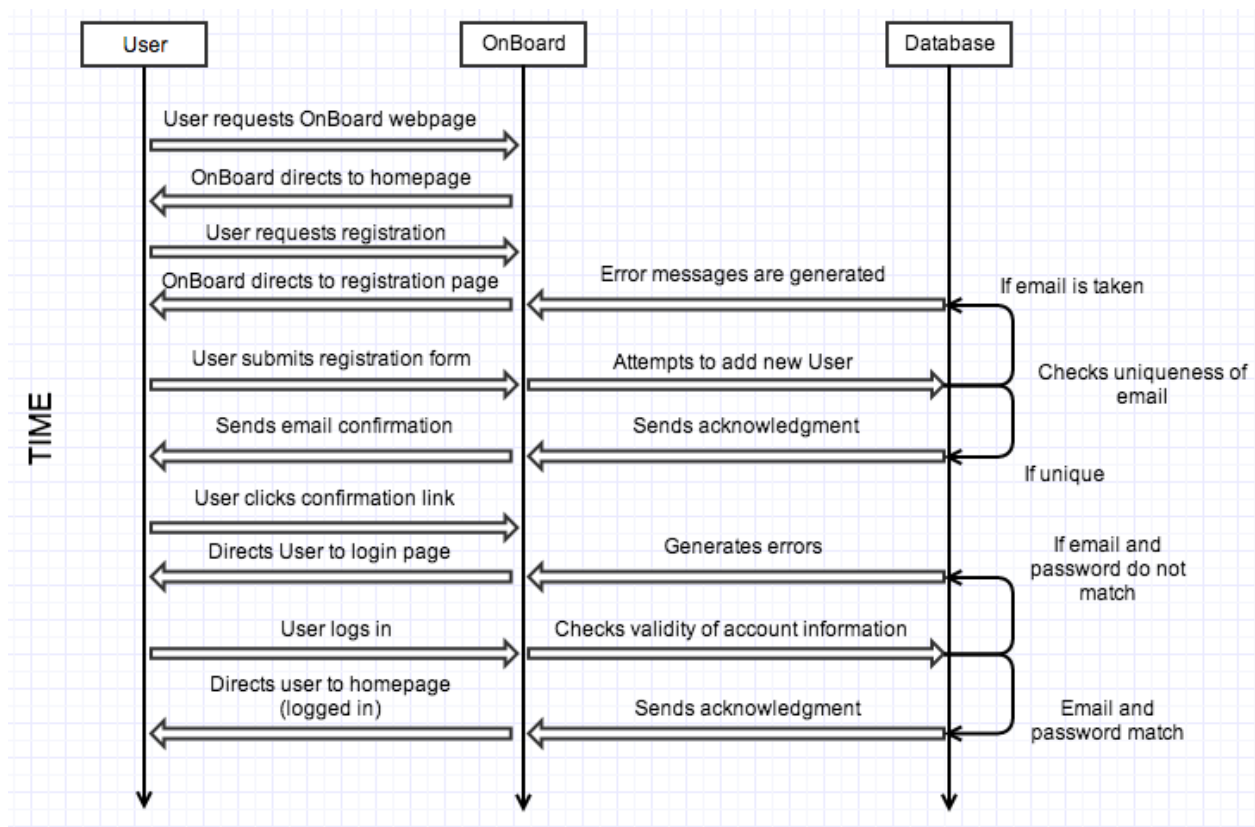
*Description: The figure above shows a failed registration attempt.*

### 3.2.4 Successful Login

Upon login, a User will be directed to their homepage which will display a Welcome screen, information about their role and the timestamp of last login, as well as a link to the User's dashboard. Recruiters will also have a link to view a list of Applicants, and Applicants will have a link to view their submitted Applications.

### 3.2.5 Unsuccessful Login

If a login is unsuccessful, a flash message will appear at the top of the screen alerting the User to an incorrect username or password. The User will then be able to resubmit their login information in another attempt.



*Description: The diagram above shows the sequence for account creation and login attempts. When a user submits a registration form, OnBoard will first check to see if the email address is already in the database. If it is, error messages will be generated and the user will be redirected to the registration page. If the email address is not in the database, it will create a new user with*

either an Applicant or a Recruiter role. Upon successful registration, the user will be prompted to confirm their email. When the email is confirmed, the user can now login to OnBoard. During a login attempt, OnBoard will check the database to see if there is an email/password match. If so, the user will be redirected to the homepage, displaying their name and email address. If there is no match, error messages will be generated and the user will be redirected to the login page.

## User Stories and Models

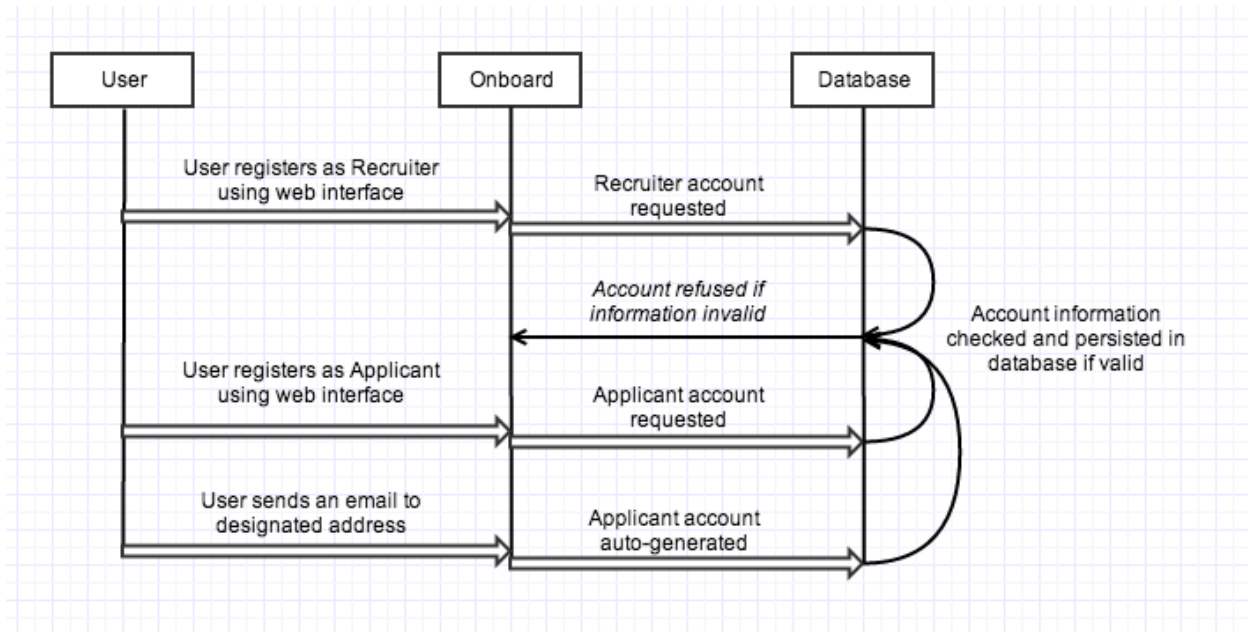
### 3.2.6 General Users

*(Completed)*

Users will be able to register an account as a Recruiter

Users will be able to register an account as an Applicant

User will be able to submit an application via email. Upon receipt of this email, an Applicant will be generated and associated with that email.

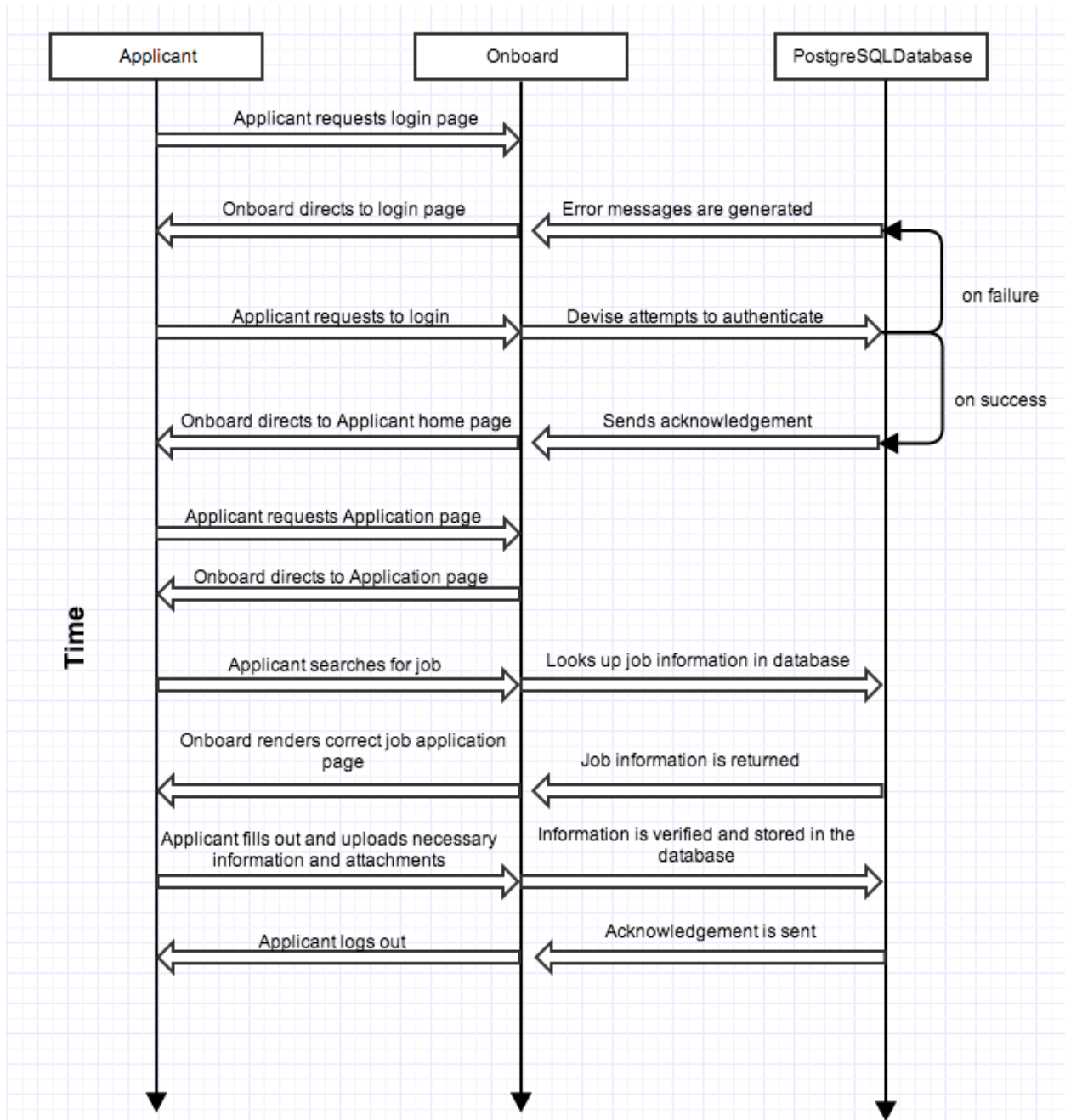


*Description: The various ways a User can create an account as a Recruiter or Applicant. An Applicant can be generated via email or through registering with OnBoard as an Applicant. A Recruiter can only be generated by registering through OnBoard as a Recruiter.*

### 3.2.7 Applicants

An Applicant will be able to submit an application to a Company through a web interface





*Description: An example use case of an Applicant user logging in, searching for a specific job, and submitting an application through Onboard.*

An Applicant's profile will contain First Name, Last Name, Email, and optional Attachments that are persisted in the database.

An Applicant's profile can be auto-generated on submission of a form or email

An Applicant's profile can be generated manually by a Recruiter

An Applicant will be able to apply for a specific Job Opening associated with a Company

An Applicant will be associated with an Application Status.

An Applicant will be notified if their Application Status has changed.

### **3.2.8 Recruiters**

Upon registration, Recruiters will have a First Name, Last Name, Email, and Company

A Recruiter will be associated with the Company with which they are employed

A Recruiter will be able to view all Applicants for their company

A Recruiter will be able to view all Applicants for a specific Job Opening

A Recruiter will be able to view all Applicants associated with a specific Application Status

A Recruiter will be able to associate themselves with an Applicant

A Recruiter can create a Job for a Company

A Recruiter will be able to view, edit, and add to an Applicant's application if it is associated with a Job opening for their Company

A Recruiter will be able to add notes to a specific Applicant or a specific application if it is associated with a Job opening for their Company

A Recruiter will be able to view a Dashboard, which displays any new Applicants that have applied for Job Openings as well as the list of all Applicants in the tracking system

A Recruiter will be notified via email if one of their Applicants has not progressed their Application Status in X amount of time

A Recruiter will be able to export an Applicant's profile to JSON or XML

### 3.2.9 Applicant Profile

Within OnBoard, there are two types of Applicant Profiles, one specific to the Applicant role and one specific to the Recruiter role.

#### *Recruiter Role*

Within the Recruiter role, the Applicant Profile shows the list of Applications that the Applicant has submitted to the Company. It includes basic information such as name, email, address, phone number, and attachments. Within this view there is also a Notes field where the Recruiter can add notes on the Applicant.

#### *Applicant Role*

Within the Applicant role, the Applicant Profile shows the Applicants basic information. They will be able to edit their Profile using the Edit page.

### 3.2.9 Recruiter Dashboard

Within the Dashboard view, Recruiters will be able to view the Applicant List related to their Company, the Application Notice Board, and the Job Openings List.

#### *Applicant List*

The Applicant List will include Applicant names, the job they are applying for and the status of their application. The Recruiter will be able to click the Applicant's name to view the Applicant Profile, which shows a list of all of their applications that include their name, email, profile picture, phone number, address, and any attachments they have included in their application. Within the Applicant Profile there is a Notes field where the Recruiter may include any notes on the Applicant.

#### *Application Notice Board*

Recruiters will be able to view any new Applications that have been submitted to their Company. Under this view, the Recruiter will be able to view the Applications and decide whether they would like to proceed with an interview.

#### *Job Opening List*

Recruiters will be able to view a list of Job Openings for their Company. Clicking on one of these Job Openings will display a view of the list of Applicants that have submitted Applications. Clicking on an Applicants will display their Applicant Profile.

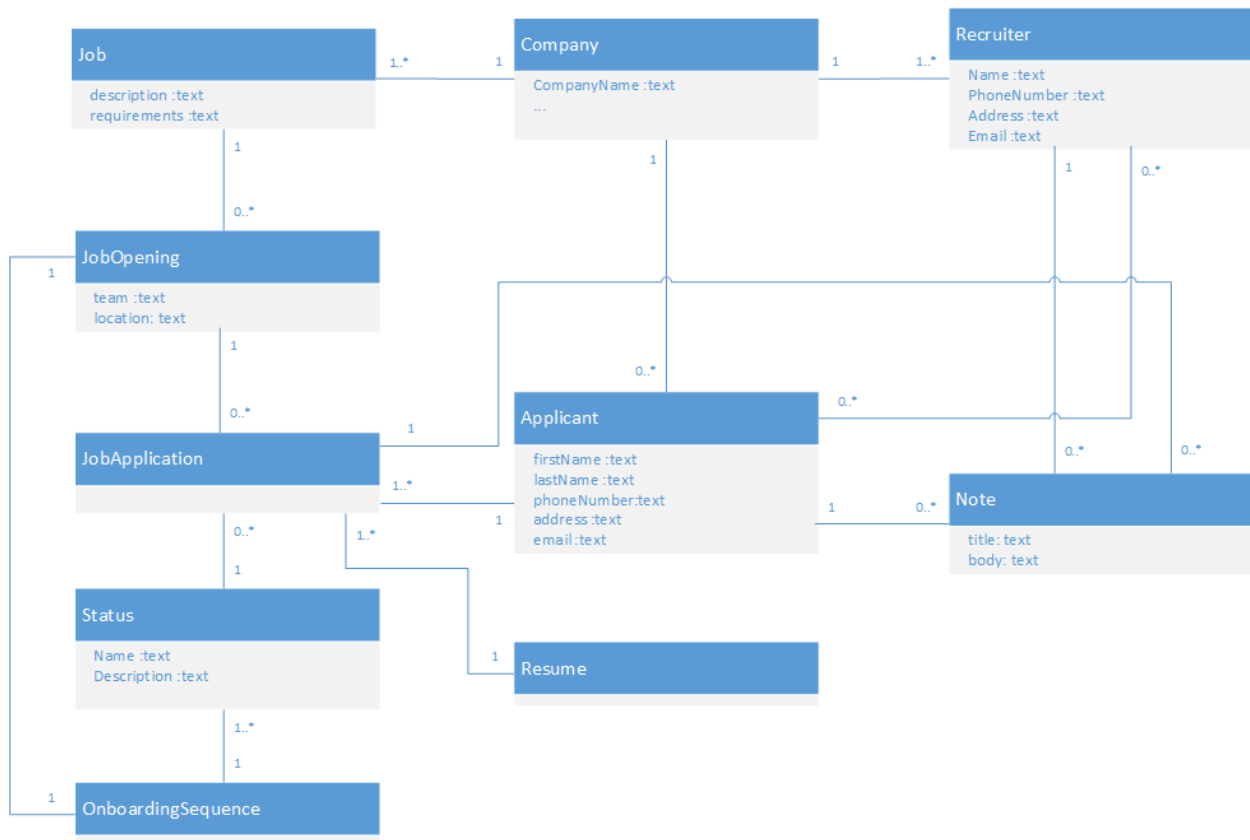
### 3.2.10 Application Management and Tracking System

#### *Application Status*

Every Application will be associated with an Application Status which will track an Applicant's progress through the interviewing and onboarding process. These could include resume submitted, awaiting first round interview, awaiting second round interview, offer extended, offer accepted, applicant rejected, etc.

Email notifications can be associated with the transition of an application into or out of an onboarding stage/status. These notifications will be automatically triggered to either send reminders to recruiters about status transitions or to send reminders to applicants about what the next step they need to take to move forward in the onboarding process.

## 4 Class Diagram



*Description: The above diagram is a visual description of the Rails Active Record Associations between data objects in the application.*

## 5 UI Mockups

### Account Generation

Welcome to Onboard

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## Viewing Job Openings within a Company

CompanyName Here

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Open Positions

QA Intern Summer 2014

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[Apply](#)

PM Intern Summer 2014

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[Apply](#)

SDE Intern Summer 2014

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[Apply](#)

Marketing Intern Summer 2014

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IT Intern Summer 2014

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*Description: This is a listing of all the job openings associated with a company. From this view applicants will be able to select specific positions to apply to. At the top is a short company description followed by a list of open positions. Each position has its own description and an 'Apply' button linking to an application form.*

## Viewing and Applying to a Specific Opening

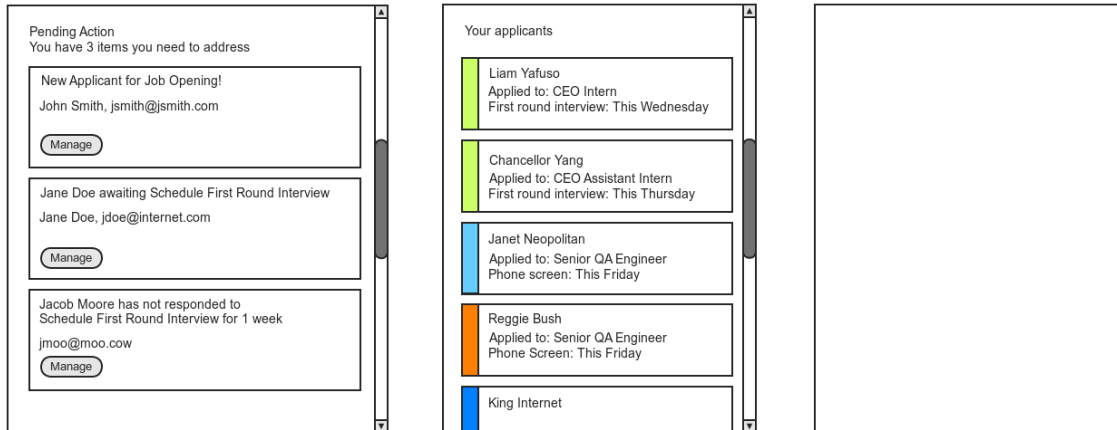
Position Title

DESCRIPTION Lorem ipsum dolor sit amet, maiores ornare ac fermentum, imperdiet ut vivamus a, nam lectus at nunc. Quam euismod sem, semper ut potenti pellentesque quisque. In eget sapien sed, sit duis vestibulum ultricies, placerat morbi amet vel, nullam in in lorem vel. In molestie elit dui dictum, praesent nascetur pulvinar sed, in dolor pede in aliquam, risus nec error quis pharetra. Eros metus quam augue suspendisse, metus rutrum risus erat in. In ultrices quo ut lectus, etiam vestibulum urna a est, pretium luctus euismod nisl, pellentesque turpis hac ridiculus massa. Venenatis a taciti dolor platea, curabitur lorem platea urna odio, convallis sit pellentesque lacus proin. Et ipsum velit diam nulla, fringilla vel tincidunt vitae, elit turpis tellus vivamus, dictum adipiscing convallis magna id. Viverra eu amet sit, dignissim tincidunt volutpat nulla tincidunt, feugiat est erat dui tempor, fusce tortor auctor vestibulum. Venenatis praesent risus orci, ante nam volutpat erat. Cursus non mollis interdum maecenas, consequat imperdiet penatibus enim, tristique luctus tellus eos accumsan, ridiculus erat laoreet nunc.

*Description: This is a generic form view for an opening. This is the result of selecting one of the links on the Job Openings page. From here an applicant can fill out information for their application and submit. Once submitted, this page will save a new 'application' instance in the database and redirect to the Job Openings page with a flash message "Application Submitted"*

## Recruiter Dashboard

Hello, <Recruiter Name>.



*Description: This is the recruiter's dashboard. On the left is a list of notices for applications that are waiting on action from the recruiter. The center view is a list of applicants, each of which will link to the list of applications associated with that applicant. The third view on the right is a list of the job openings the recruiter has been assigned to fill. Each job opening links to a list page displaying the applications associated with that opening.*



## Applicant Profile View (Recruiter's Perspective)

# Jenny Tutone

[jenny@internet.com](mailto:jenny@internet.com)  
Phone Number: (805) 867-5309  
Address line 1: 123 Fake Street  
Address line 2: Apartment 12  
City: Goleta  
State: CA  
Zip: 93117

Jenny is applying to 2 positions:

Jenny Tutone  
Applied to: Audio Engineer  
Phone screen not yet scheduled

Jenny Tutone  
Applied to: Stage Manager  
Phone screen not yet scheduled

Jenny has previously applied to 1 position

Jenny Tutone  
Applied to: Audio Engineer  
Rejected

Notes

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[- Recruiter 1](#)

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[- Recruiter 2](#)

*Description: This is a view of an applicant profile as seen by a recruiter. There is a list of all the applications to positions associated with the recruiter, along with general notes made by any recruiters associated with the same company about the applicant. General account information is also available from the recruiter view.*

## Applicant Profile View (Applicant Perspective)

# Jenny Tutone

[jenny@internet.com](mailto:jenny@internet.com)  
Phone Number: (805) 867-5309  
Address line 1: 123 Fake Street  
Address line 2: Apartment 12  
City: Goleta  
State: CA  
Zip: 93117

You are applying for 3 positions at 2 companies:

Company1 Name

Jenny Tutone  
Applied for: Audio Engineer [View Application](#)

Jenny Tutone  
Applied for Stage Manager [View Application](#)

Company2 Name

Jenny Tutone  
Applied for: Audio Engineer [View Application](#)

## Job Application View (Recruiter's Perspective)

# Jenny Tutone's Application

Phone Screen	First Round Interview	Second Round Interview
--------------	-----------------------	------------------------

Offer Extended	Rejected
----------------	----------

[View full Status History](#)

[Resume](#)

Notes

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[- Recruiter 1](#)

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[- Recruiter 2](#)

Lorem ipsum dolor sit amet, maiores ornare ac fermentum, imperdiet ut vivamus a, nam lectus at nunc. Quam euismod sem, semper ut potenti pellentesque quisque. In eget sapien sed, sit dui vestibulum ultricies, placerat morbi amet vel, nullam in in lorem vel. In molestie elit dui dictum, praesent nascetur pulvinar sed, in dolor pede in aliquam, risus nec error quis pharetra... [\(View More\)](#)

[- Recruiter 3](#)

*Description: Job application view as seen by a recruiter. It lists the stage of the application along with any notes that recruiters have made over the course of the application process. An applicant's view of their own application will display only the information they submitted, namely their resume and other submission criteria, and all other company-level information will be hidden.*

## Applicants for an Open Position and Status View

# Applicants for QA Intern Summer 2014

Need to schedule Phone Screen	Waiting for Phone Screen	Need to Schedule First Round Interview	Waiting for First Round Interview	Need to Schedule Second Round Interview
<Applicant Name> <a href="#">&lt;phone_number&gt;</a> <a href="#">&lt;email@email.email&gt;</a>	<Applicant Name> Scheduled for <Date>	<Applicant Name> <a href="#">&lt;phone_number&gt;</a> <a href="#">&lt;email@email.email&gt;</a>	<Applicant Name> Scheduled for <Date>	<Applicant Name> <a href="#">&lt;phone_number&gt;</a> <a href="#">&lt;email@email.email&gt;</a>
	<Applicant Name> Scheduled for <Date>	<Applicant Name> <a href="#">&lt;phone_number&gt;</a> <a href="#">&lt;email@email.email&gt;</a>		<Applicant Name> <a href="#">&lt;phone_number&gt;</a> <a href="#">&lt;email@email.email&gt;</a>

*Description: View of all applications for a Job Opening. This view is reachable from a recruiter's dashboard if they are associated with that opening. Each column is one of the stages in the*

*onboarding process and a recruiter has the ability to move an applicant from one stage to the next.*

## 6 Glossary

**API (Application Programming Interface):** Specifies how software components within an application will interact with one another

**CanCan:** A Ruby gem that provides authorization with Rails.

**Cloud Foundry:** A PaaS that Onboard will be deployed on. It is developed by Pivotal.

**Devise:** A Ruby gem that provides authentication with Rails.

**PaaS (Platform as a Service):** A set of services aimed at developers that helps them develop and test apps without having to worry about the underlying infrastructure.

**PostgreSQL:** An object-relational database model that Onboard uses.

**RoR (Ruby on Rails):** An open source web application framework which runs on the Ruby programming language.

**Ruby:** A dynamic, reflective, object-oriented, general-purpose programming language, which will be used in the development of Onboard.

**SaaS (Software as a Service):** A software distribution model in which applications are hosted by a vendor or service provider and made available to customers over a network.