

EVOLVE

TALENT ACQUISITION SUITE

Release Notes

Q1 2023

Table of Contents

Overview	3
Release Impact	3
Technical Requirements	3
Recruiter Productivity Takes Center Stage	3
Disclaimer	4
ATS and Onboarding	4
Native eSignature for Offer Letters	4
Auto Deletion Date	5
Enhanced Candidate Search Capabilities	6
Evaluation in APIs (Early Access)	6
Japanese Language Support	6
Onboard Tax Form Updates	6
Recruitment Marketing	7
Email Drip Marketing	7
Referrals in Recruitment Marketing Platform Enhancements	8
Other Enhancements and Updates	12
Integrations	13
New Recruitment Marketing Job Board Integrations	13
Recruitment Marketing Integrations	13
Analytics	14
Referrals Looker Model Update	14
LinkedIn RSC Authorized Support	14
Custom Field Updates	14
Native e-Signature Reporting	14
Add 'Channel' to RM Source Mapping Audit Report	14
Email Campaign Report	14

Overview

Release Date

The Evolve Applicant Tracking System (ATS) and Recruitment Marketing (RM) Releases are scheduled during the maintenance window on Wednesday, April 26th. There is no major downtime anticipated during the release process, but there may be minor interruptions to service as components of the system are upgraded across our server farms and hosting facilities.

Release Impact

This release impacts Evolve ATS and Onboarding, Recruitment Marketing, Platform Integrations, Analytics and Reporting, with improvements across all areas of the system.

Technical Requirements

The release will be delivered to all Evolve customers automatically. There are no IT, project, or end-user requirements to receive the upgrade. The interface overhaul will occur for all users of the Evolve systems as part of the release. All previous configurations will be maintained as part of the release process.

New features that require configuration will be released in the 'off' position to allow our customers time to evaluate, configure, and test the features for rollout in an organized timeframe.

Recruiter Productivity Takes Center Stage

With this release, Evolve delivers significant functionality to support the productivity of your recruiting team. In the challenging recruiting environment we all face, Evolve is committed to providing tools and solutions to help teams effectively and efficiently source, attract and hire the best available talent. To support this objective the Q1 2023 release has several exciting features including:

- Native eSignature for Offer Letters
- Email Drip Marketing
- Onboard Tax Form Updates
- And many new analytics reports!

Some features included in this release are Early Access. Early Access Programs provide our customers a sneak peek into the new and exciting product features Evolve has been working on over the past weeks and months, and a chance to provide direct feedback on products that are actively under development. If you are interested in participating in any Early Access Program listed in this document, please contact your Customer Success or Account Manager.

Disclaimer

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ATS and Onboarding

Native eSignature for Offer Letters

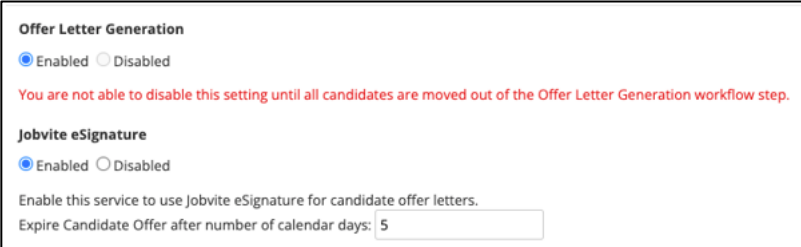
Third-party eSignature solutions can be extremely expensive. In speaking with one of our customers, we discovered they spend around \$100,000 annually on their eSignature solution. We also know that some of our competitors offer native eSignature solutions.

What Changed

In order to increase our product offerings and help customers reduce their costs related to eSignatures, we have rolled out a new feature called Jobvite eSignature.

Key Highlights

- Admins can configure the expiration period for the electronic signature request (1-365 calendar days)
- Improved user experience
 - Reduce/eliminate errors related to account inventory.
 - Display the expiration date within the candidate's workflow.
 - Ability to void an Offer Letter and add a reason/comment.
- Candidate Electronic Consent Agreement
- Candidate's ability to eSign via "Type-to-Sign"
- Customers currently using DocuSign with Jobvite Offer forms can switch to Native eSignature. See the *Native eSignature for Offer Letters User Manual* for requirements and instructions.

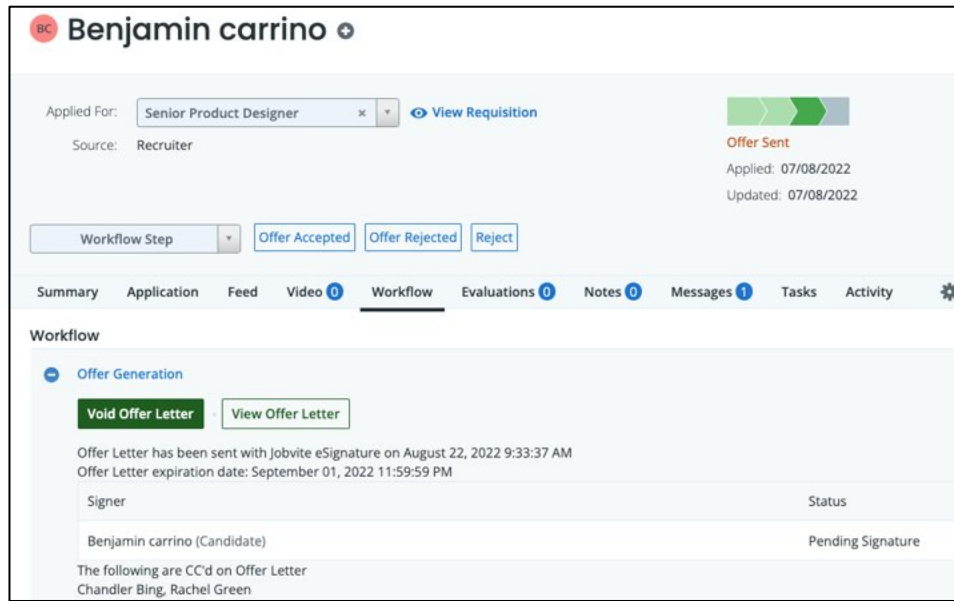


The screenshot shows a settings panel for "Offer Letter Generation". It includes two sections: "Offer Letter Generation" and "Jobvite eSignature". Both sections have radio buttons for "Enabled" (selected) and "Disabled". A red warning message states: "You are not able to disable this setting until all candidates are moved out of the Offer Letter Generation workflow step." Below the "Jobvite eSignature" section, there is a text input field for "Expire Candidate Offer after number of calendar days:" with the value "5" entered.

User Improvements

- The user experience will be improved by reducing and/or eliminating integration errors associated with the clients' eSignature service provider. Examples of integration errors:
 - "Account has been suspended"

- “Envelope Allowance Exceeded”
- The candidate's experience will be improved by reducing the number of emails sent to the candidate. The candidate will only receive one email from Jobvite instructing them to review and sign their Offer Letter. Previously, the candidate would receive two emails related to their Offer Letter; (1) Jobvite advising an Offer Letter is coming from an eSignature provider, (2) eSignature provider asking the candidate to review and sign their Offer Letter.



Auto Deletion Date

Customers needed a faster way to identify which candidate records were scheduled to be anatomized. Previously, customers had to select the *Custom* option, then select the desired date range.

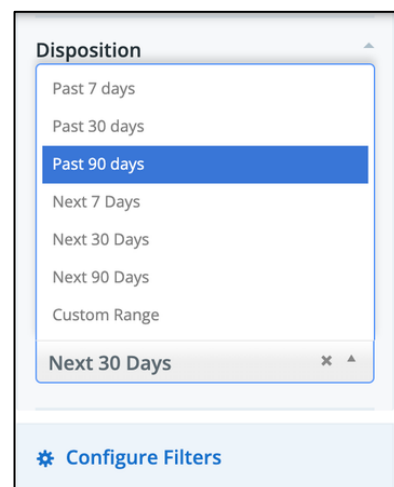
What Changed

We have updated the *Auto Deletion Date* filter on the Candidate Search screen to include future dates. Now customers can quickly search for candidates using the new dropdown options.

Key Highlights

The following options were added to the dropdown:

- Next 7 Days
- Next 30 Days
- Next 90 Days

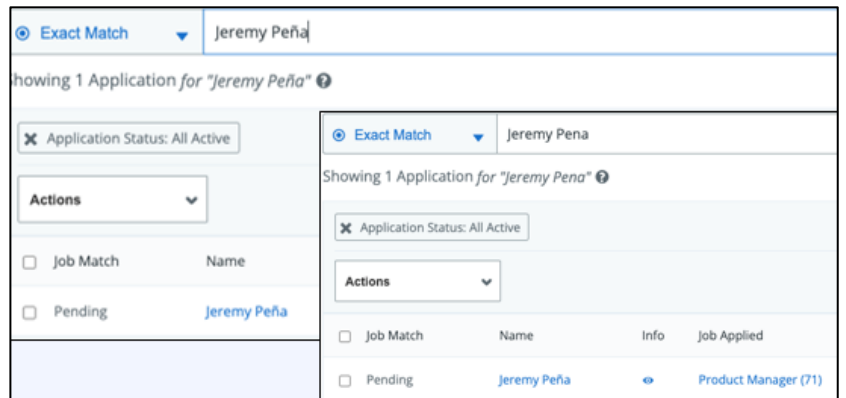


Enhanced Candidate Search Capabilities

The Candidate Search capability limited search results based on upper/lower case and/or accents in the text.

What Changed

We have improved user experience by returning results in the Candidate Search that match text regardless of the case and/or accent.



Evaluation in APIs (Early Access)

What Changed

Clients will soon have another way to complete their Candidate Evaluations outside of the Evolve ATS or Hiring Teams app. This new API will allow customers and third-party vendors to integrate with Evolve ATS to extract Candidate Evaluation questions and post responses back to our system.

Key Highlights

- No additional Admin configurations are required within the ATS
- Reduce and eliminate the number of incomplete evaluations
- Reduce the time to complete candidate evaluations
- Allows for faster feedback cycles

Japanese Language Support

Previously, users were not able to add Japanese as their preferred language.

What Changed

We have added full language support for Japanese in ATS and Onboard. This allows the product to be accessible by users with different locales and different language preferences. This feature can be enabled for a customer instance in the Language settings.

Onboard Tax Form Updates

In order to be in line with the latest Tax regulations of Federal and State governments, the Onboard environment has updated the latest Symmetry Payroll Forms from the existing version to R3-2023.

Key Highlights

- Form corrections and updates
- Catalog Updates
- API update

NOTE: Refer to the Onboard Tax Form Catalog Comparison sheet for a comparative view of the updated fields.

Recruitment Marketing

Email Drip Marketing

Email Drip Marketing is an automated sequence of emails sent to an audience at specified intervals influenced by actions the recipients take or by changes in their status.

Key Highlights

- Increase Engagement
 - Increase Engagement of dormant audiences automatically
 - Re-engage with past applicants, talent network candidates
- Improve Recruiter/User Efficiency
 - Setup and re-use email campaigns, clone to make new campaigns
 - Add candidates to email campaigns easily
 - Increased (automated) sourcing activity without additional effort
- Measure Success and Refine
 - Measure and optimize engagement
 - Consistently measure CTA success
 - Optimize message content, frequency, and steps to gain the best results

Recruiters Can:

- Create a Single Use or Ongoing email campaign
- Schedule email campaigns as soon as possible or at a later date
- Add candidates to email campaigns (from Search and Lists)
- Remove candidates from email campaigns
- Filter candidates in Talent lists by email campaign (include/exclude) and their status in that campaign
- Complete an Ongoing email campaign
- Clone an existing email campaign
- Configure exit criteria on an email campaign – any of; Candidate applied for a Job, Candidate joined Talent Network, or Candidate's Lifecycle State is X (changed)
- Auto-email assignment to Email Campaign in Jobs, Talent Networks, Folders
- View the performance report of an email campaign in the product, and a "Drip Email Campaign" Dashboard in Analytics
- See Candidate Membership in an email campaign
 - Shown on the Lists tab
 - Show, in the List or Search summary

NOTE: The Email Drip Marketing features will be generally available to all Evolve Recruitment Marketing (Talemetry) customers beginning the week of May11th. Please contact your Account Manager or Customer Success Manager for more information.

Campaigns

Settings
Templates
Messages
Mass Email
Mass SMS
Scheduled Emails
Email Campaigns

Email Campaigns Add Email Campaign

4 RESULTS Filters Sort By: Date Created

NAME	EMAILS	STATUS	TYPE	START DATE TIME	DURATION	DATE CREATED	CREATED BY
Nov 2022 BlackBear Health T...	3	In Progress	Ongoing	2022-11-17 - 09:55 AM	2 months 1 day	2022-11-17 - 09:50 AM	Andrew Salesy
2022 BlackBear Health TN N...	3	In Progress	Ongoing	2022-11-10 - 05:45 PM	2 months 1 day	2022-11-10 - 05:29 PM	Irina SalesDemo
Nov 20 Onsite event - RN	5	New	Single Use		18 days	2022-11-10 - 03:49 PM	Irina SalesDemo
Test Email Campaign	1	New	Ongoing		1 day	2022-11-08 - 01:17 PM	Anthony Montemmarano

EMAIL CAMPAIGNS / NOV 2022 BLACKBEAR HEALTH TN NEWSLETTER (NURSING)

Nov 2022 BlackBear Health TN Newsletter (Nursing) Complete Pause

FROM: Andrew Salesy | TYPE: Ongoing | STATUS: In Progress | RECIPIENTS: 4 | START DATE TIME: 2022-11-17 - 09:55 AM

Details | **Emails** (3) | Report

Details

NAME: Nov 2022 BlackBear Health TN Newsletter (Nursing) | STATUS: In Progress

DESCRIPTION: Heath Talent Network for Nursing

FROM: Andrew Salesy | CAMPAIGN CODE: 2022 Blackbear Health TN Nursing

TYPE: Ongoing | DURATION: 2 months 1 day

Activity

CREATED BY: Andrew Salesy | DATE CREATED: 2022-11-17 - 09:50 AM

DATE UPDATED: 2022-11-17 - 09:57 AM

Referrals in Recruitment Marketing Platform Enhancements

Talent acquisition teams around the world are using employee referrals to drive employee engagement and attract the highest quality talent. We help organizations streamline their referral program and harness their social capital – bringing talent acquisition in line with today’s social and connected world. Now you can manage your Advanced Employee Referral Program on the Evolve Recruitment Marketing Platform.

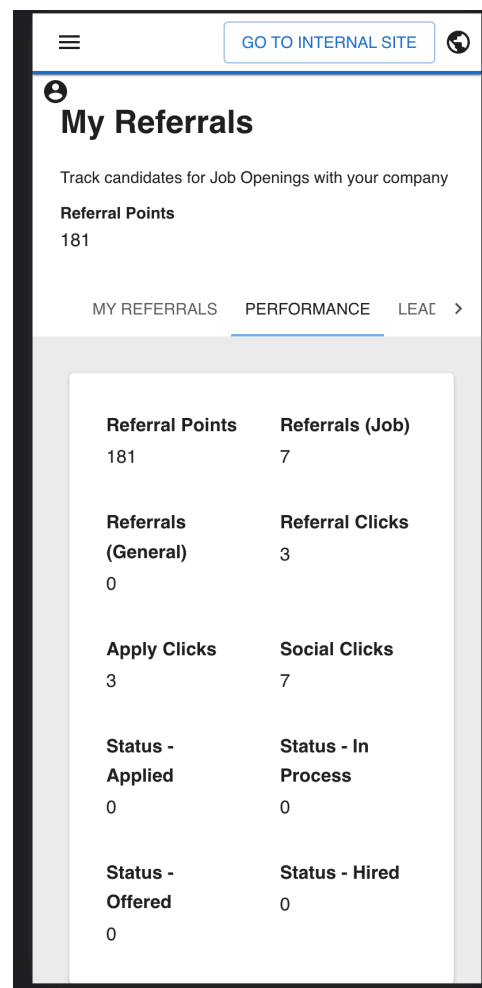
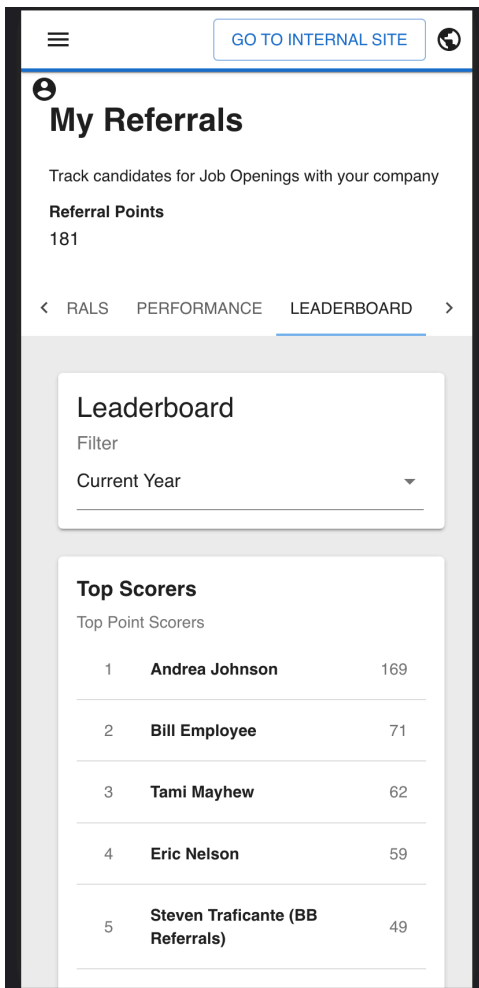
Key Benefits:

Delivering capabilities of Advanced Employee Referrals to manage your program on the Recruitment Marketing platform.

- Reduce the cost of hiring (Referrals are less costly than external hiring)
- Decrease time to hire by leveraging Referrals
- Referrals have a higher conversion rate
- Referral hires stay at the company longer

Gamification, Employee Portal

- The employee can see the Leaderboards on the Leaderboard tab. These include up to the Top 10 of the following:
 - Top Scorers – by total points
 - Most Referrals Made – by referral count
 - Source of Most Hires – by hire count
 - Biggest Sharers – by view click/apply count
 - Referred Most Jobs – by unique job count
 - Leading Departments – the departments by total points
- The employee can filter Leaderboards by Date Range
 - The default is “Current Year”
- (Fix) Improved leaderboard alignment when there are no items or fewer items in a leaderboard
- (Enhancement) Improvements to Employee Portal layout of usability on a mobile device (Referrals tab, Gamification tab, Leaderboard tab, and About tab)



Custom Eligibility Rules

- Company Admin can define custom eligibility rules that run on every referral made
 - Boolean/Complex Rules can be written based on properties of the Employee/User, Job, and Referral
 - Includes Job Custom Fields, User Custom Fields
 - Includes Job Assigned Users
 - Each rule can be associated with a custom ineligible rule code (which can be given customer-specific translations)
- Company Admin can create eligibility rules from a template
- Other Eligibility Rules Improvements
 - (Enhancement) New Feature Switch – Export Eligible Employee Referral information to Apply Workflow (only when using Apply Workflow for candidate applications)
 - (Enhancement) Eligibility calculated on General Referrals
 - Check for non-job related rules (such as exclusivity) and includes any custom ineligibility rules
 - (Enhancement) Eligibility Lapsed Calculation
 - Check when referral eligibility reaches the end of exclusivity, and the referral is not dispositioned (i.e. Hired or Not Selected)

Referral Eligibility Rules				+ Referral Eligibility Rule
<input type="text" value="Search Referral Eligibility Rule Name"/>		<input type="text" value="Name"/>		↑
[CANDIDATE] CAN'T HAVE APPLIED TO SAME JOB BEFORE REFERRAL IN THE LAST 12 MONTHS <small>Candidate previously applied for the same job in exclusivity period.</small>	Active	⌚ about 21 hours ago 📅 15 days ago	🗑️	
[CANDIDATE] NO JOB APPLICATIONS APPLIED FOR ANY JOB BEFORE REFERRAL IN THE LAST 12 MONTHS <small>Candidate previously applied to another job in exclusivity period.</small>	Inactive	⌚ 1 day ago 📅 15 days ago	🗑️	
EMPLOYEE - CANNOT BE DIRECTOR LEVEL OR HIGHER (USER CUSTOM FIELD) <small>Employee cannot be director level or higher (CF)</small>	Inactive	⌚ 3 months ago 📅 5 months ago	🗑️	

Edit Referral Eligibility Rule

Name *

Rule *

Ineligible Code

Active

Administrator Override

- Company Administrator can see a list of all referrals
 - Filter by specific referral name
 - Filter by date range, status, job, employee, referral type, eligibility
 - Sort by Date Created/Updated or Last Name
- Company Administrator can override the Incentive Amount, Referral Status, Employee and/or Eligibility (make eligible or ineligible)
- Changes reflect in CRM (Referrals tab), Employee Portal, and Analytics
- Company Administrator can see the events log of a specific referral record, including details of events
 - For override events, show the user who did override and extended values

NOTE: No employee notifications are generated for these changes

Referrals Log

Date Updated

All Direct Job only Direct General only Social Job only Social General only

All Eligible only Ineligible only

All Referred Applied In Process Offer Hired Not Successful

All Last 30 days Last 60 days Last 90 days

Employee

Job

Bill ApplyAfter			
Status	Offer	Referral Date	04/03/2023
Email	acunsolo+bapplyafter@gmail.com	Eligibility	Eligible
Employee ID	330476	Reward	\$2000 CAD
Employee Name	Bill Employee (HR)	Referral Type	Direct Referral - Job
Employee Email	acunsolo+bemployee@talemetry.com	Job Title	Marketing Campaign Manager
		Job ID	1767
Tom Applybefore2			
Status	Applied	Referral Date	04/03/2023
Email	acunsolo+tapplybefore@gmail.com	Eligibility	Eligible
Employee ID	330482	Reward	\$2500 CAD
Employee Name	Carl Employee (VP)	Referral Type	Direct Referral - Job
Employee Email	acunsolo+cemployee@talemetry.com	Job Title	Marketing Campaign Manager

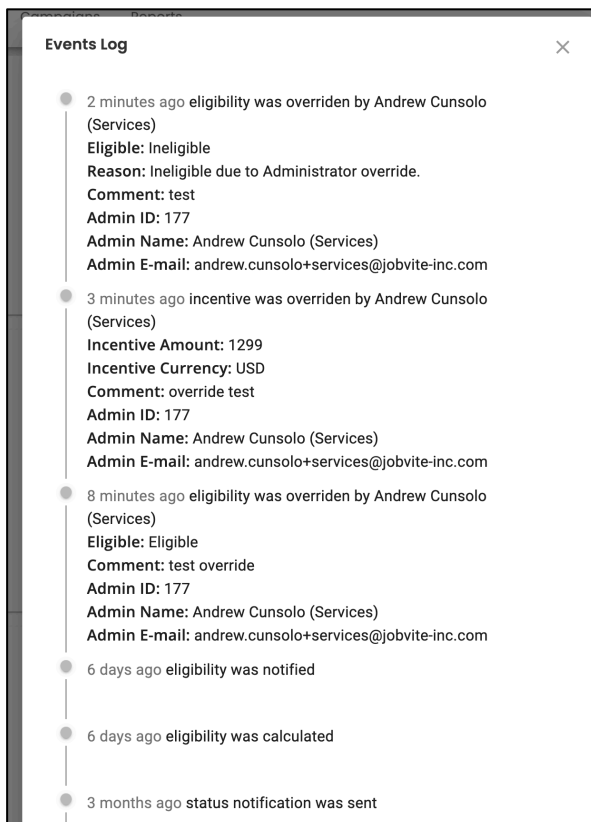
- Change Status
- Change Employee
- Change Incentive Amount
- Mark Eligible
- Events Log

Referral Override - Change Employee

Employee
Andrew Vendeur

Comment
Admin referred on behalf of this employe

Cancel OK



Other Referral Enhancements and Fixes

- (Enhancement) Employees can receive configured Referral Notifications when they make a direct General Referral
- (Fix) Assert Referral Record + Lookup Eligible Employee – not asserted if upper case characters in an email address
- (Fix) Apply – Text to Apply – Duplicate referral profiles created
- (Fix) Improvements to Referral Status updates from ATS Job Disposition changes

Other Enhancements and Updates

Career Site Improvements

- (Enhancement) ATS Source Mapping supports params starting with underscores (for Career Site redirect to ATS to Apply)
NOTE: Supports 2-level source redirect to Jobvite ATS for application. Parameter is “__jvst,__jvsd”
- (Fix) Career Sites – Content Headers could not be added or edited
- (Fix) Copy Clipboard not working for URL in Career Sites → Content → Jobs
- (Fix) Google Cloud Jobs – Truncate US Zip Codes to 5 digits on Sync to ensure accurate location-based results
- (Fix) Resolved URL encoding issue with “Share” to email for Outlook

Other Enhancements

- (Enhancement) A candidate receiving an email from Apply and Referrals sees the *From* email name
- (Enhancement) System Audit – Records services user when a services user does an activity in Source&CRM
- (Enhancement) Candidate can upload and parse an Excel (xls orxlsx) resume file in Apply Workflow

Integrations

New Recruitment Marketing Job Board Integrations

Per Post/Selective Broadcast

- Vibrant Pittsburg
- HBCUConnect
- Pittsburgh Tech
- WV LGBTQ+
- Women Work
- MyFutureJobs

Other Enhancements and Defect Fixes

- (Enhancement) LinkedIn ©
 - Add remote work field
- (Fix) ZipRecruiter – Organic Feed – remove <url> if Zip Apply is enabled

Recruitment Marketing Integrations

Taleo Enterprise Edition

- (Enhancement) Internal Mobility: Implemented Internal Mobility with TEE
- (Fix) Referrals: Find referring employee's candidate record by employee ID

Evolve ATS

- (Enhancement) Add Hash code to Question ID, Location ID, and Candidate ID pulled from Evolve ATS into Evolve RM
- (Enhancement) Make additional API calls before archiving the job in Evolve RM

Infor

- (Fix) Discrepancy in Resume Name Format when manually applying with no resume

Generic Candidate Import

- (Fix) Pass full RMX transaction from RP account to SFTP server

Analytics

Referrals Looker Model Update

When a candidate was referred by an individual, the referrals were not always tied to that candidate. The new update remediates that issue by associating the candidate with the most recent eligible referral.

LinkedIn RSC Authorized Support

Part of the LinkedIn Recruiter System Connect (RCS) integration requires users who have a LinkedIn Recruiter account to authorize Evolve ATS to sync data on behalf of the user from LinkedIn to Evolve ATS. Customers have requested a report determining which LinkedIn Recruiter users have been authorized within Evolve ATS and which ones have not, along with which ones have an active LinkedIn Recruiter or Hiring Manager license. Functionality has been added so customers can see this information.

Custom Field Updates

Multiple custom fields displayed in Analytics were not user-friendly for customers. Custom fields show as 'Duplicates' when a user creates a field with the same name on several different forms which leads to multiple instances of this field in Analytics. The goal is to change this behavior and consolidate those entries in Analytics.

Native e-Signature Reporting

This report provides value to our customers by giving them a report to track the status of their applicants so they can follow up if required or move to the next step in the onboarding process.

Add 'Channel' to RM Source Mapping Audit Report

By adding 'Channel' to the RM Source Mapping Audit report, the customer can get a better understanding of where their applicants are coming from.

Drip Email Campaign Report

This report will allow customers to better understand the performance of their email campaigns from the perspective of emails sent, delivered, opened, clicked, etc.