EVOLVE

TALENT ACQUISITION SUITE

Release Notes

May 2023

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 Talent Acquisition Suite

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Overview

Release Date

The Evolve Applicant Tracking System (ATS) and Recruitment Marketing (RM) Releases are scheduled during the release window on Wednesday, June 6th. 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 May 2023 release has several exciting features including:

- SMS Consent (RM)
- Job Board Distribution Integration with VONQ (ATS)

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.

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ATS and Onboard

SMS Consent

Customers using Intelligent Messaging within Evolve ATS need to ensure they are TCPA compliant and respect a candidate's desire to be or not to be communicated with through text messages.

What Changed

A new standard SMS consent field in ATS will allow recruiters to know if a candidate has consented to communication via text message. Candidate consent can be captured through the Apply form and in the scenario that a candidate does not consent, the system will prevent any text messages being sent to them. This includes one-to-one messages, one-to-many messages, and Amplify (mass text campaign).

How to Use

- Admin Navigation for Candidate Profile: *Admin → Custom Fields → Candidate → Compliance – SMS Consent*

- Admin Navigation for Apply: *Admin → Custom Fields → Apply → Compliance – SMS Consent*

Recruitment Marketing

Email Drip Marketing Improvements

Enhancements and Fixes

- (Enhancement) Campaign and Source privilege has been renamed to "Mass/Drip Email".

- (Enhancement) A warning popup has been added when a user *Cancels* or *Completes* an email campaign used in auto-email.

- (Fix) Exist Rules are now cloned when an email campaign is cloned.

Referrals in Recruitment Marketing Platform Improvements

Enhancements and Fixes

- (Enhancement) Custom Eligibility Rules - Assert eligible referral records from ATS applications

    - Additional use cases are now covered

    - Now includes support for ATS applications (customers not using Apply Workflow, Evergreen Req Movement, Recruiter Candidate Movement).

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- (Fix) Referrals Log – Changed default end filter date to today +1

- (Fix) Referrals Log – Employee ID previously displayed internal ID, fixed to show the proper value

- (Fix) Notifications – Now shows *From User* name for ineligible emails sent to an employee

CRM Improvements

Sort Candidates in CRM

- (Enhancement) Recruiters can now sort a candidate list (folder, talent network, agency list, job candidate list, import, referrals, employee surveys) or search
    - o New Sort Control is on every candidate list and search screen
    - o Options to sort by:
        - ▪ Rank (default, descending only)
        - ▪ First Name
        - ▪ Last Name
        - ▪ Age of Resume

Improved Boolean Search

- (Enhancement) Boolean now searches only candidate profiles excluding Job Applications and Visitor data.

    NOTE: This enhancement requires a migration on a per-customer basis. Please contact your Account Manager for details on when this change will occur.

CRM Enhancements and Fixes

- (Enhancement) Users without privilege will no longer see Lifecycle and Audience fields on the auto-search setup

- (Enhancement) System Audit – An audit of saved searches is now available

Other Enhancements

- (Enhancement) Job – Custom Field – Date Format Configuration
    - o Services users can now configure the expected custom field incoming format. If left blank, the current default logic will use YYYY-MM-DD.
- (Fix) Internal – Career Site Authentication – Force logout and login will now happen to a user when accessing a different account's internal career site (including SSO logout support).
- (Fix) Candidate Portal – Previously, users could not access the portal with a non-primary email address of a CRM candidate. This has been resolved.

Integrations

Recruitment Marketing Integrations

New Job Board Integrations

- *No new integrations happened in May*

Other Enhancements and Defect Fixes

- (Enhancement) Auto-Broadcast Settings Improvement
  - Improved the layout for the Configuration screen (grouping features together)
  - Dynamic posting date – Now allows configuration of a date to use as a posting date to various job boards coming from the ATS or shown on the career site.

Evolve ATS Integrations

Shield Screening Partner (Tazworks)

- Background check provider

Analytics

Referrals Analytics

Enhancements and Fixes

- (Enhancement) Referral Data Set – Candidate and Candidate Custom fields now tie to the referral, which is now on the Candidate Profile with Source = Referral for a candidate that is referred via the Evolve RM Referrals module.

Other Enhancements, Fixes, and Updates

Enhancements and Fixes

- (Enhancement) Email Campaign Report in CRM
  - In the Email Performance section, we have added the following columns:
    - Removed by recruiter
    - Removed automatically