EVOLVE

Recruitment Marketing

Source and CRM User Manual

for Hiring Managers and Recruiters

EVOLVE
Recruitment Marketing

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Source & CRM Overview

Evolve enterprise-grade Source and CRM tool empowers companies to easily identify candidates, engage and segment talent, and build relationships with candidates in scale. Within this tool in Recruitment Marketing (RM), users will spend less time sourcing and more time connecting with the right candidates.

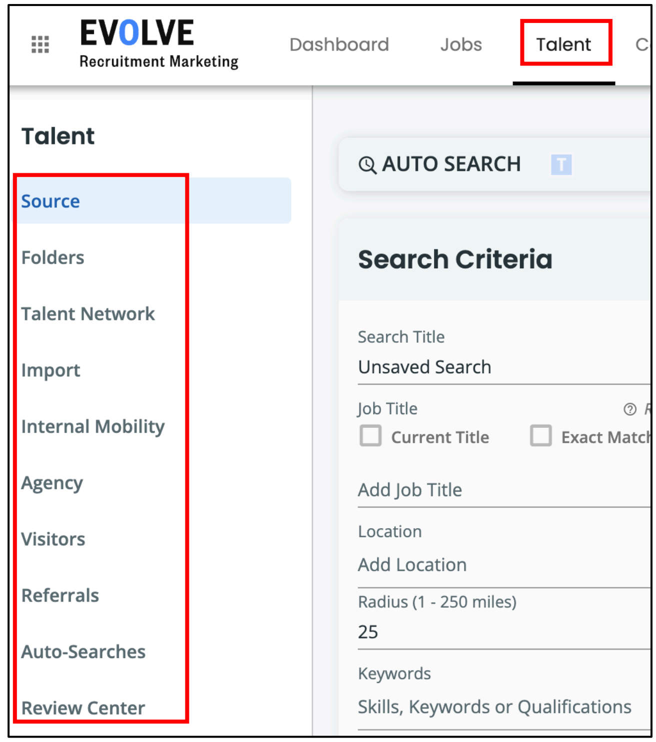
Use Cases

- Consolidate all sources of candidates
- Manage central talent pool and relationships
- Campaign to candidates and measure results
- Automate and reduce the recruiter's time
- Source for high-volume jobs
- Build proactive talent pipelines
- Manage event registration and remarketing

Terminology

Term	Definition
Candidate	An active or passive job seeker sourced for an opportunity before the apply process.
Applicant	An active job seeker who has applied to your targeted positions.
Candidate Tags	A candidate identifier that can be used in keyword searches.
Import	A standard tool to import single or multiple resumes to Evolve RM.
Email Templates	Templates that are configured within Source & CRM to allow recruiters to communicate with applicants.
Job List	Gathers jobs into a group, based on pre-set filters. For Source & CRM, a single Job List can be enabled so that a user can choose to email a link to a candidate to invite them to apply for a specific job.
Candidate Stages	Highlights the status of job seekers in the pipeline.
Audiences	Candidates with key skills and experience that are most important to your business results.
Lifecycle	Audiences that you already have a known relationship with including employee referrals, internal employees, alumni, the contingent workforce, and past applicants (such as high-potential candidates).

Navigation



Once you have logged in to Evolve Recruitment Marketing (RM), click the **Talent** tab to access these Source & CRM options:

- **Source** – Where you will conduct new searches and review the results of your saved searches. You can perform actions on candidates such as moving them to a Folder or Job, classifying them, and sending emails or text messages.
- **Folders** – Used to group like candidates. *Example*: Creating Folders for key talent areas to build proactive pipelines, specific roles, locations, skillsets, etc. Once candidates are in a Folder, you can move them through a defined process using Stages. You will only see the Folders you have created or that have been shared with you.
- **Talent Network** – This shows you all the candidates who have joined your Talent Network. If you have more than one Talent Network, you can choose *All*, or pick a specific Talent Network to review and action candidates.
- **Import** – Allows you to view and search against all candidates imported into Evolve RM from other sources.
- **Internal Mobility –** Here you can see all internal employees who have completed the Talent Assessment survey.
- **Agency** - If your company is using recruitment agencies, you can review all candidates submitted by them.
- **Visitors** – This will appear in the menu if your company has RM Career Sites and has enabled personalization and the visitor pool. Visitors will track candidates who land on your career site along with what searches they are conducting and other insights on visitor behavior.
- **Referrals** – Allows you to see all referrals made for the company.
- **Auto-Searches** – Allows you to create searches to automatically download candidates from selected job boards then add them to a Job or Folder overnight, or to automatically classify and group your Evolve talent pool.
- **Review Center** – Recruiters and sources often need to get the opinion of hiring managers on potential hires. The Review Center is the place where all review requests are shown, and review feedback can be given.

NOTE: The list of available options may not match what you see based on your company's configuration and/or your user access.

Working with Candidates

In Evolve RM you can easily work with your talent pool, review resumes and other candidate details, and perform actions on the candidates.

Candidate Summary

A **Candidate Summary** is designed to give you an overview of the displayed candidate without leaving the results list. The following elements are displayed on the summary (providing that the data is available on the resume):

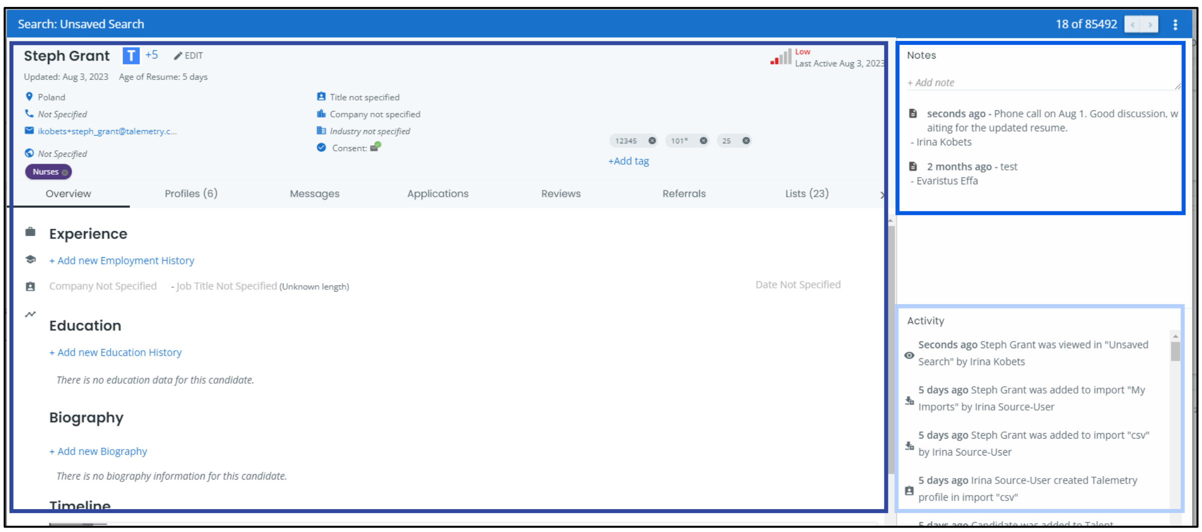
- **Candidate Name** – First and last name
- **Contact Details** – Location, phone number, email, and personal URL.
- **Membership** – Shows the talent lists where this candidate is saved.
- **Consent** – Displays the value for candidates who have specified their consent to be emailed or texted. The consent filter will use the value of the most recent across all profiles of the candidate.
- **Source** – Source of the candidate's main profile and (below the + icon) are sources of all other available profiles of that candidate.
- **Updated** – The last time the profile was changed in RM.
- **Age of Resume** – How long ago the candidate's main profile was created in RM.
- **Candidate Engagement Score** – Level of candidate engagement and the date when they were last active. Actions performed by a candidate create their engagement score. Each day of inactivity decreases the score. After six months of inactivity, a candidate with Very High engagement will go down to Inactive.
- **Work History** – Job title and company of the two most recent work records.
- **Recent Activities** – The two most recent activities performed on that candidate's record.
- **Tags** – Searchable tags that have been added to the candidate record.
- **Lifecycle State** – Current Lifecycle state of the candidate.
- **Audience Type** – Audience types where the candidate is assigned.

NOTE: Evolve RM uses the candidate's email to identify and merge candidates.

Candidate Profile

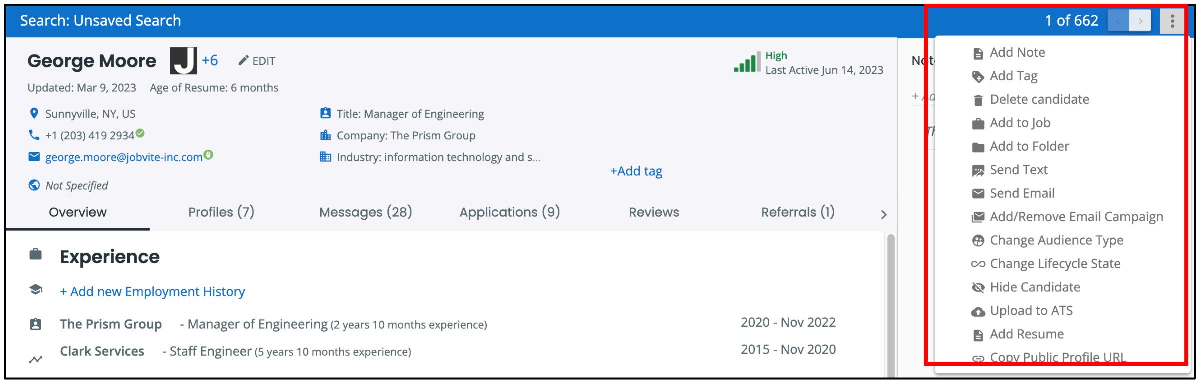
The **Candidate Profile** in Source & CRM allows users to see all information available on a candidate. The profile can be accessed by clicking a candidate's name. It consists of the following sections:

- **Main** – This area includes the candidate's information and information found on the *Candidate Summary*. This section also includes several tabs that present all information available in CRM on that candidate: *Overview*, *Profile*, *Messages*, *Applications*, *Reviews*, *Referrals*, *Lists*, *Other Fields*, *Visits*, and *Attachments*.
- Action Menu
- **Notes** – This area is where users can add notes to the candidate profile and view notes posted by other users.
- **Activity** – This area includes a thread of all actions performed on that candidate by all CRM users. The main profile section has several candidate Summary, Overview tab, Profile tab, Messages tab, Applications tab, Reviews tab, Referrals tab, Lists tab, Other Fields tab, Visits tab, and Attachments tab.



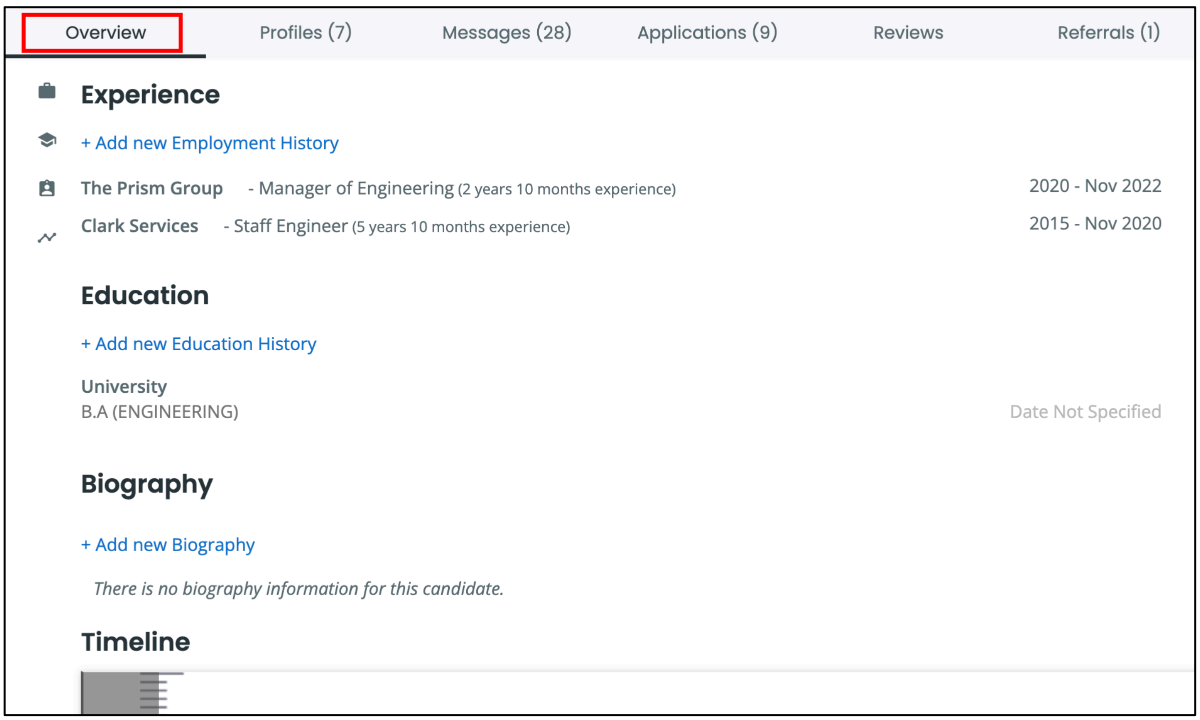
The **Action Menu** within the profile will allow you to perform the following actions (up to 25,000 candidates at a time).

- Add Notes/Tags
- Move candidates to Jobs or Folders
- Send communications – Email and SMS
- Set/Change Audience and Lifecycle
- Hide candidates on your saved talent list
- Copy Public Profile URL
- Send Email / Send Mass
- Send Text / Send Mass Text
- Add/Remove Email Campaign



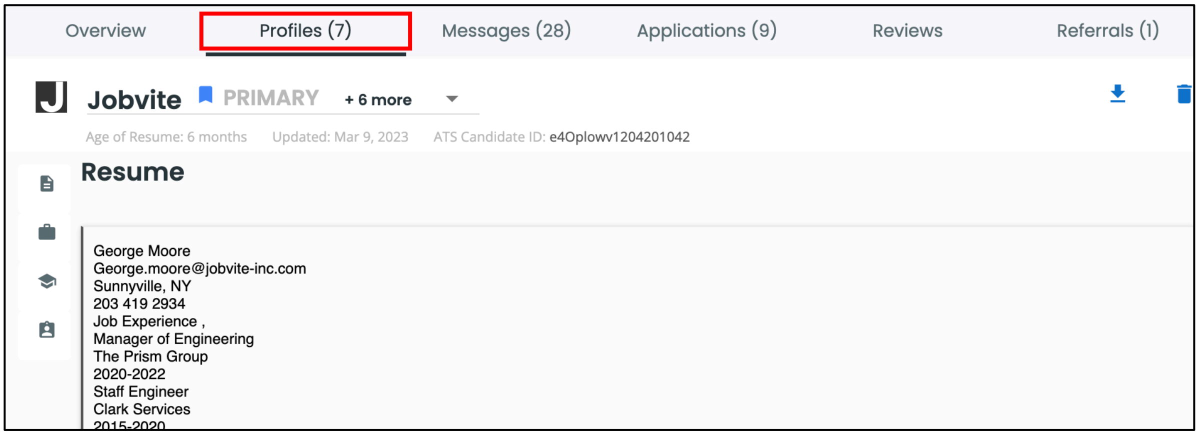
Overview Tab

The **Overview** tab provides the candidate's Experience, Education, Biography, and a Timeline based on their history.

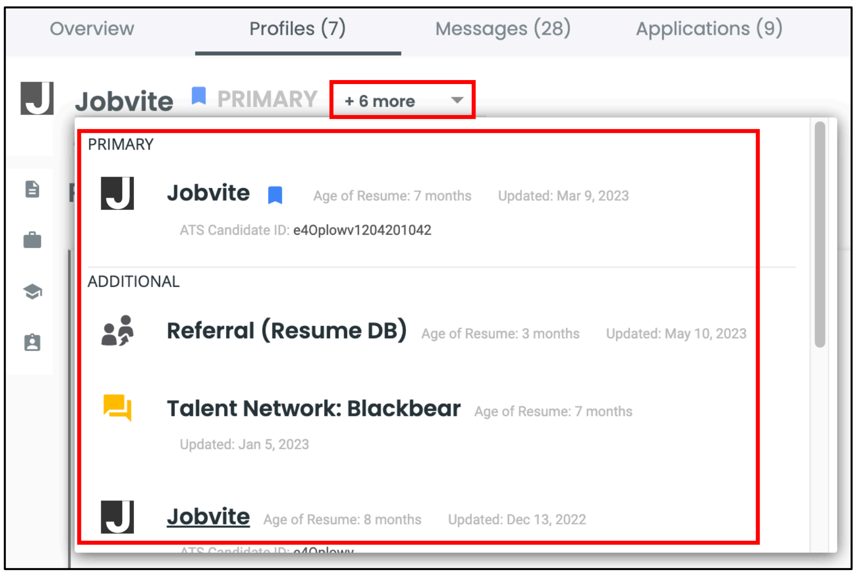


Profiles Tab

The **Profiles** tab shows all resumes available in the CRM for the candidate. The resume displayed by default is defined by the system or selected manually by a company user. It has been used by the system for data extraction. If additional resumes are found, their sources are listed next to the candidate's name in the profile header. The sources are hyperlinked and when clicked, they open the corresponding resume.

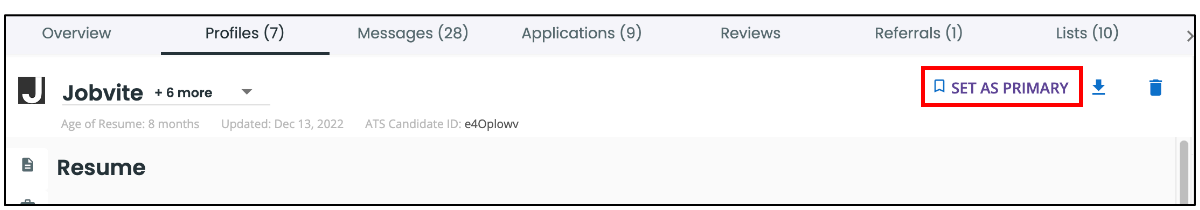


When multiple profiles are available for the candidate, a dropdown list will be available where users can select to view additional profiles. The primary profile and other profiles are always ordered by the Age of Resume with the most recent being first.



NOTE: For Agency and Talent Network profiles, the list of profiles shows the name of the Talent Network and Agency next to the source name. The list also shows the Age of Resume and the last Updated date for each profile. ATS profiles imported via API show the ATS ID on the list of profiles, next to the source name, and on the tab when the ATS profile is selected to be viewed.

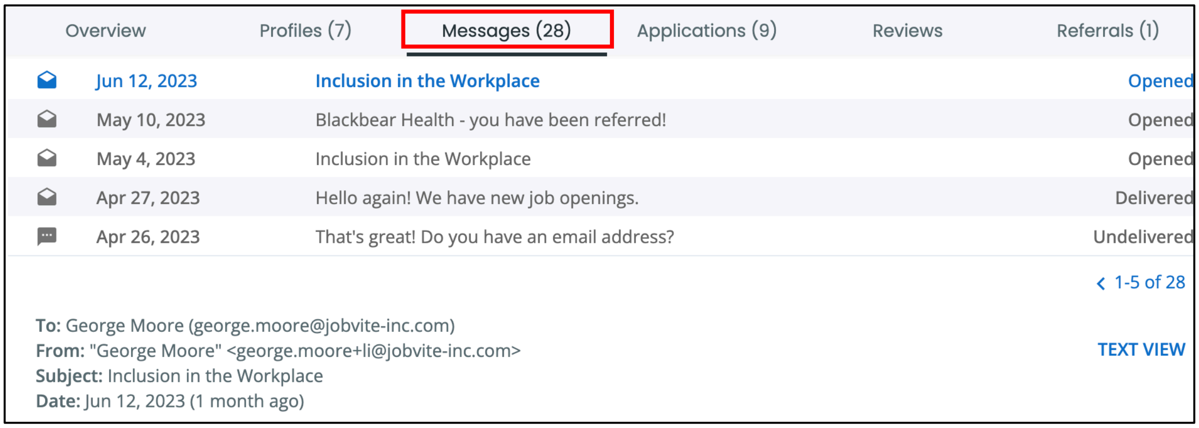
You can select any profile to view, edit, or even set it as the primary profile.



NOTE: The next time the candidate is viewed the primary profile will be the one displayed.

Messages Tab

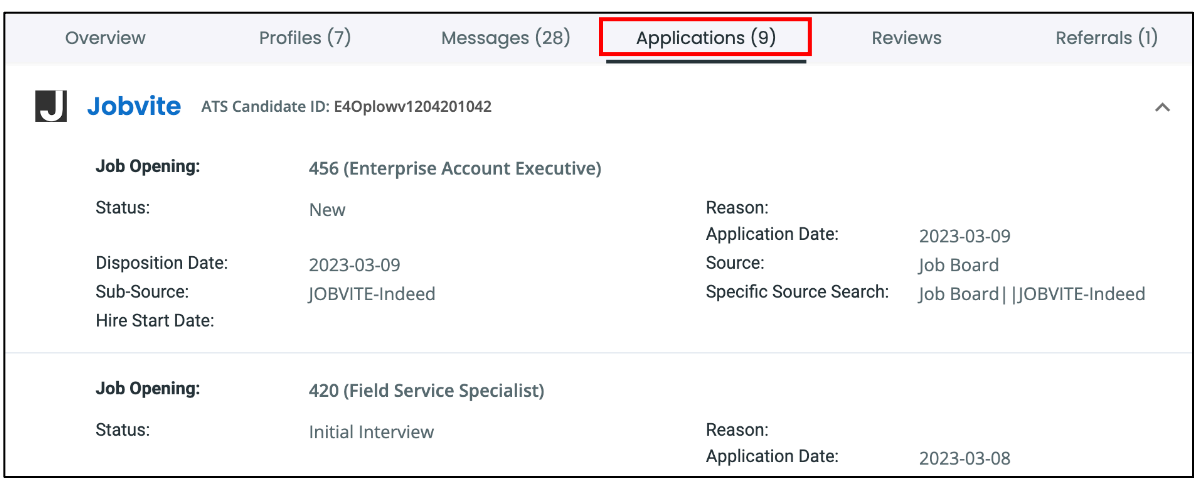
The **Messages** tab displays the communication history, detailing all emails and SMS messages sent to the candidate, SMS messages received from the candidate, and email communication with the candidate forwarded by recruiters from their inbox to CRM. You will see the date the communication was sent, the subject line, and the delivery status. If you want to see the content of the message, click the subject line.



When recruiters communicate with potential candidates through email, they want this conversation to be visible on the candidate's profile once the candidate is created in Evolve RM. The Forward External Emails feature will allow recruiters to forward or BCC their email communication with candidates to Evolve RM. The system will look up the candidate by the email address used in the forward conversation. If the match is found, the conversation will be attached to the candidate's profile.

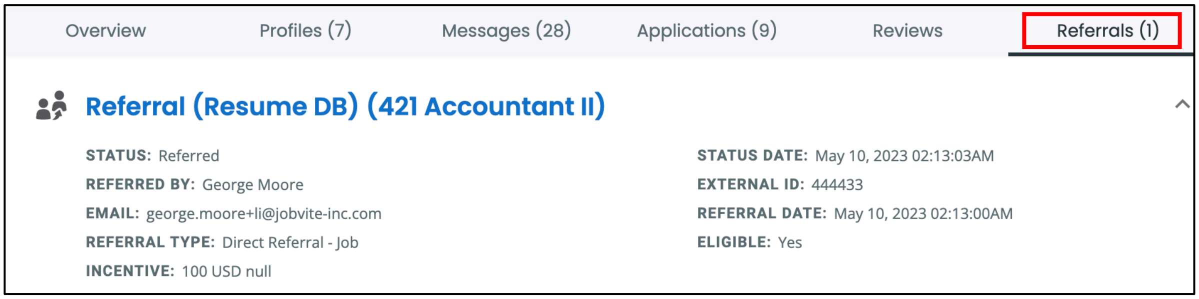
Applications Tab

The **Applications** tab contains information about the Candidate ID in the ATS, the application history (i.e. what jobs they applied for in the ATS and where they are in the ATS process), and the referral history (i.e. what deemed source and sub-source they are in the ATS). The specific data shown on this tab is dependent on the ATS integration.



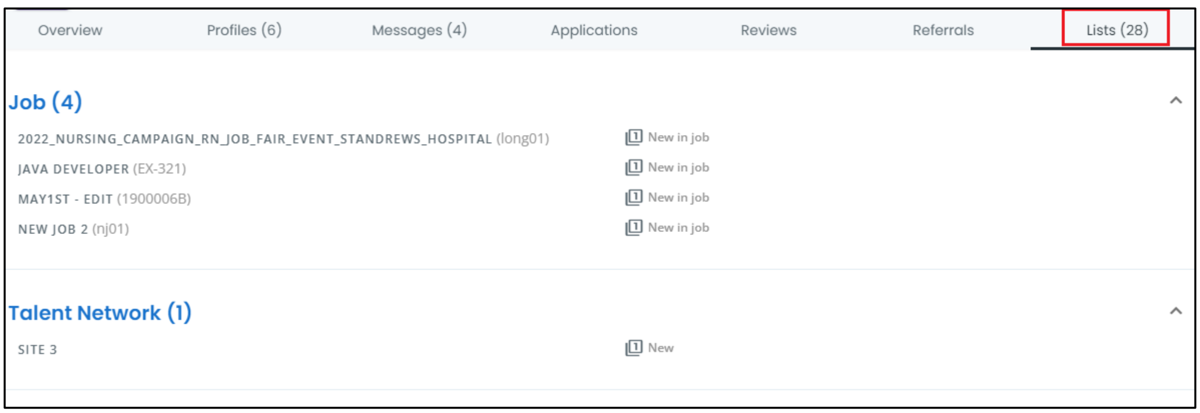
Referrals Tab

The **Referrals** tab displays the referral details if the candidate was referred by someone. The tab includes details of the referrer, when the referral happened, the status, and incentive eligibility.



Lists Tab

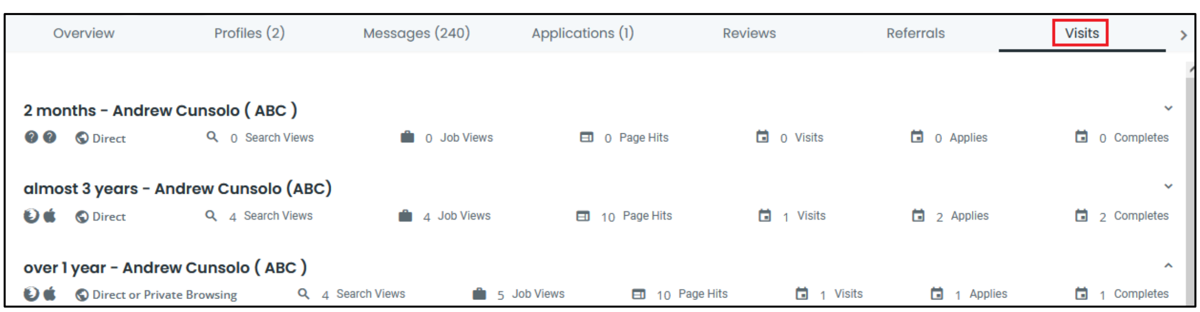
The **Lists** tab shows the talent lists where the candidate is saved including Folders, Jobs, Talent Network, Imports, Agency, and the email campaigns where the candidate has been enrolled.



Visits Tab

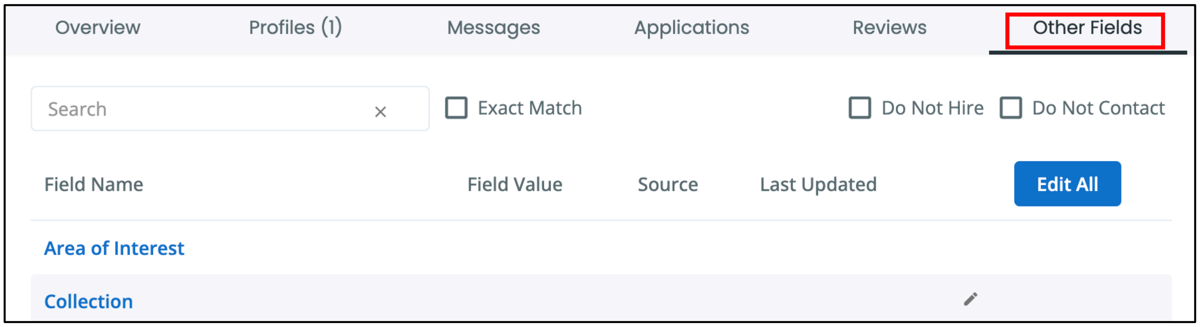
The **Visits** tab shows information about the career site visits that a candidate in Evolve RM has had in the past on a company's RM Career Site. This includes:

- When they visited a Career Site(s)
- Statistics on each visit, including jobs viewed, pages viewed, searches run, and job notifications created (visible when the visit record is expanded)



Other Fields Tab

The **Other Fields** tab shows data of the Custom Fields that was collected for that Candidate on any of their profiles, the values of the standard fields (Department, Business Unit, Primary Brand, Primary Locale if configured and available on the candidate), as well as the editable Do Not Contact and Do Not Hire checkboxes.



The tab shows all fields (custom or standard) that have been configured to show on the profile.

The fields are shown as a single list ordered alphabetically.

Each field displays:

- **Field Name** - The name configured for that custom field in CRM.
- **Field Value** - The value that the candidate has for that field.
- **Source** - The source of the value, which is either the profile source or the manual update.
- **Last Updated** - The date of the Field Value.
  NOTE: If an ATS profile is updated (resynced) from the ATS with an updated custom field value, the Last Updated date for that field will be the date when the changed value was synced into RM.
- **Edit** - Those fields where *Allow Edit* on Profile is turned **on**, have the edit control (user privilege is required)
- **Show All** - Available for candidates that have custom fields on multiple profiles, allows to see additional values for that field passed with other profiles. Each additional value shows the source of the corresponding profile.

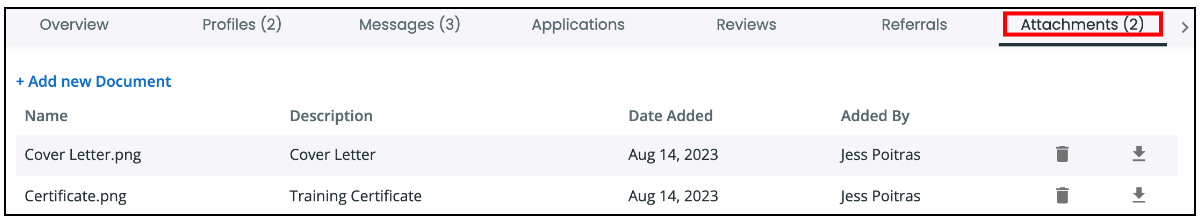
The fields configured as editable, get individual Edit controls. **Edit All** is also available to open all editable fields in edit mode and save all changes with one click.

Attachments Tab

The **Attachments** tab shows non-resume attachments that are saved on that candidate's record. The attachments include those collected from the candidate via Apply Workflow, synced from ATS, or added manually by recruiters who have the *Edit Candidate* privilege. Each attachment record shows:

- **Name** – The file name with the extension
- **Description** – An editable description of the attachment (e.g. cover letter or certificate, etc.)
- **Date Added** – The date when the attachment was saved on the candidate.
- **Added By** – Who added the attachment:
  - *Apply* for attachments collected through Apply
  - *Talemetry API* for attachments synced from ATS
  - *Name of the recruiter* who added the attachments to the profile

The total number of non-resume attachments that are available for the candidate is displayed within the tab.

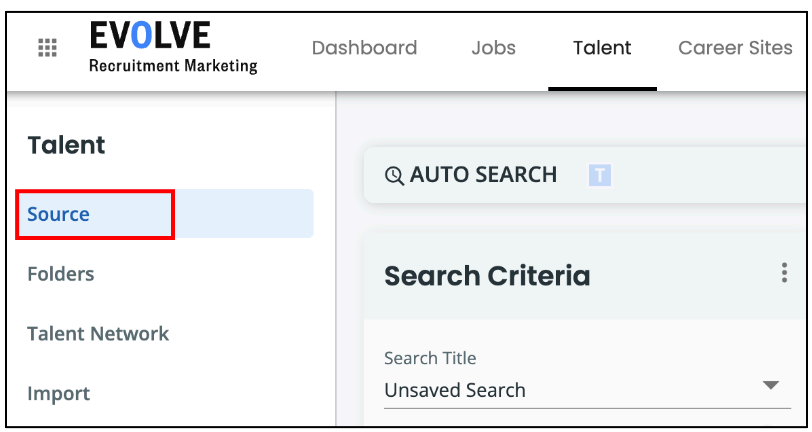


NOTE: Attachments are not searchable.

Source

Source is a candidate's pool of the company where all existing candidates are stored and where users can get more candidates by downloading them from Job Boards. In Source, a user can:

- Search the Talent Pipeline and work with the found candidates.
- Add candidates to Folders or Jobs.
- Contact candidates via email or SMS.
- Upload candidates to the ATS.
- Add Tags to candidate profiles.



If a company has licenses on external Job Boards integrated with Evolve RM, Source will allow searching on those job boards and download resumes from there into RM.

Searches

Within the **Search** section of Source, you can:

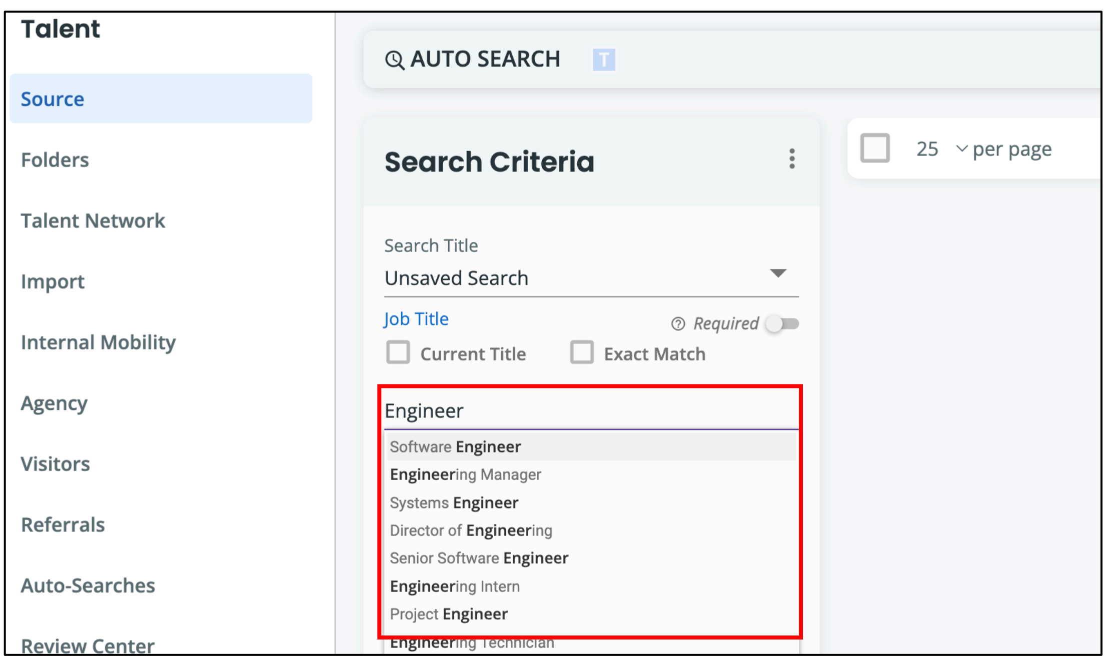
- Create a search based on any combination of desired job titles, competencies, skills, experience, education, location, and other criteria.
- Rate the importance of each required competency and skill to ensure you are searching for the ideal candidate for your specific role.
- Use your position title as the criterion for our intelligent semantic search.
- Specify the sources where you want to look for the candidates.
- Get a list of the matching candidates quickly form your pool of talent. The list will be ranked based on your search criteria.
- Run your search across multiple external resume databases concurrently.
- Auto-searches can be enabled to find candidates for specific, open positions and to help build Talent Pipelines for the future.

Search by:

- **Keyword**: Pulls from resume and application forms
- **Job Title**: Pulls from the Job Title field
- **Location**: Must be specific

Create a Search

In the *Job Title* field, enter the title of the job that you want to search. As you begin typing, Source will generate a list of associated titles. Select the best match from the provided list.



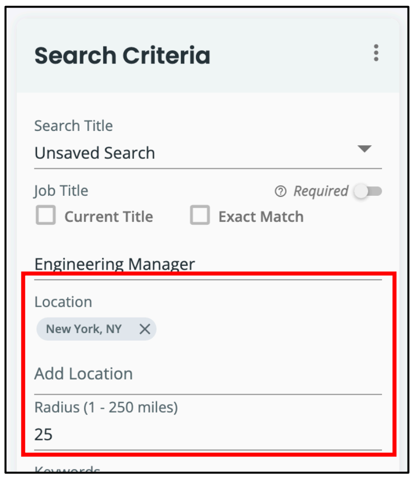
The Job Title field will search for a job title through the entire work history of the candidates on any of their profiles. To search for the current title, select **Current Title**.

By default, the search will be performed using a library of related job titles. Candidates that have a closer related title will have a higher ranking. To limit your search to the candidate with the specific job title, select **Exact Match**.

If you want to use the job title as a required filter, turn on the *Required* toggle. Otherwise, the job title would be used for ranking results that match your other search criteria.

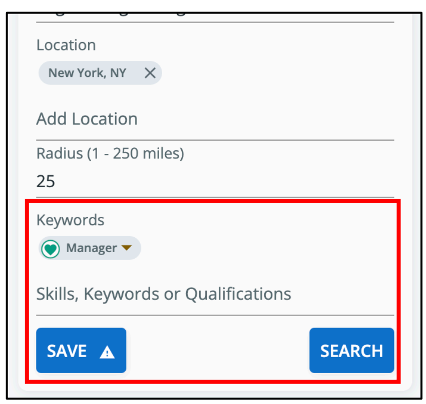
Enter the location(s) where you would like to find your candidates. You can also specify within what radius from the given location(s) your best candidates should reside.

NOTE: A typical location should be unambiguous (i.e., City, State – not just City)



NOTE: While you can search Evolve RM or ATS candidates using multiple locations, many job boards will only support a single location. So, if you are searching against job boards, you should only use one location in your search.

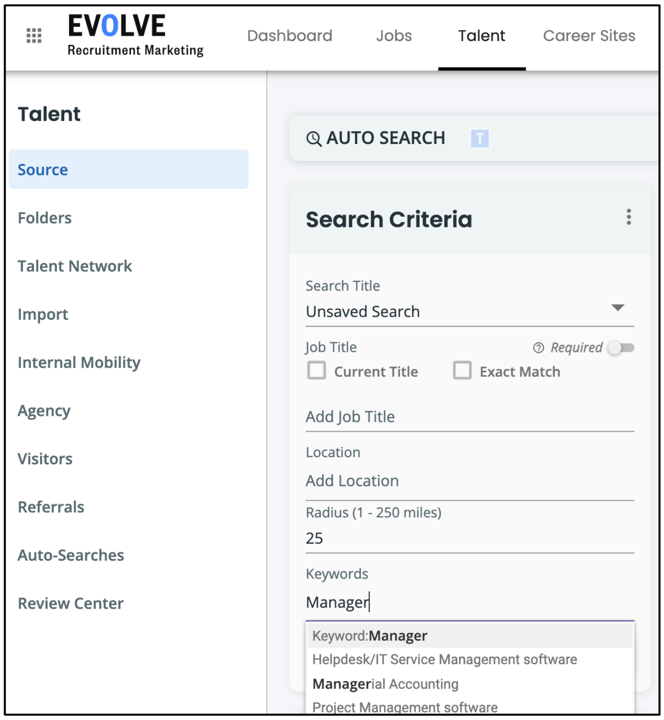
Add any keywords you would like to see in the returned resumes. Then, click **Search**.



Search will be performed within your Evolve talent pool (includes candidates in Evolve from your ATS, Talent Network, previously downloaded Job Boards, and/or imported into Evolve), as well as on any additional Job Boards available for your company and configured for your user.

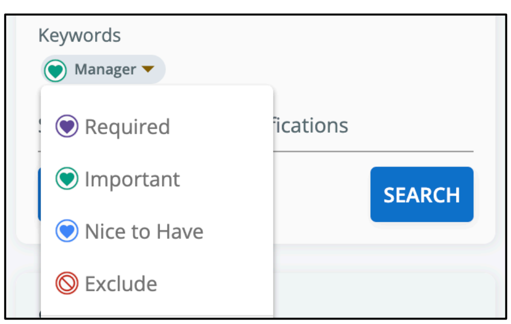
Create Keyword Options

Your search can have any number of keywords. To add a keyword to your search criteria, type it in the Keywords field. As you begin typing, Source will open a list of relevant, pre-defined terms that you can use.



When a keyword is added to your search, you can specify its ranking to let Source know how important it is to you that the returned resumes contain that keyword. The default ranking is *Important*, but you can change it as needed. Click the down arrow next to the word and select the ranking that suits your needs:

- **Required** – All candidates must have this keyword in their profile and will be ranked high.
- **Important** – Candidates with this keyword may be ranked higher in the results.
- **Nice to Have** – Candidates with this keyword may be ranked higher in the results, but not as much as Important.
- **Exclude** – Candidates who have this keyword will be excluded from the search results.



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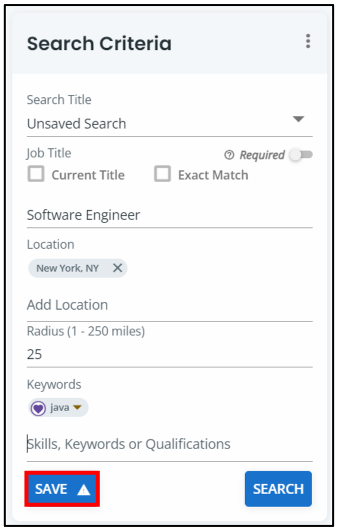
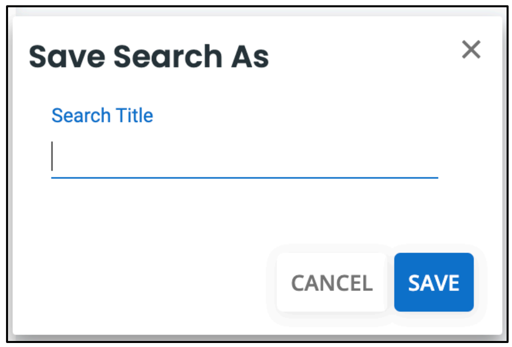
Saving a Search

Once you have the criteria added to the search, you can save it by clicking **Save** → adding a **Search Title** → clicking **Save** again.

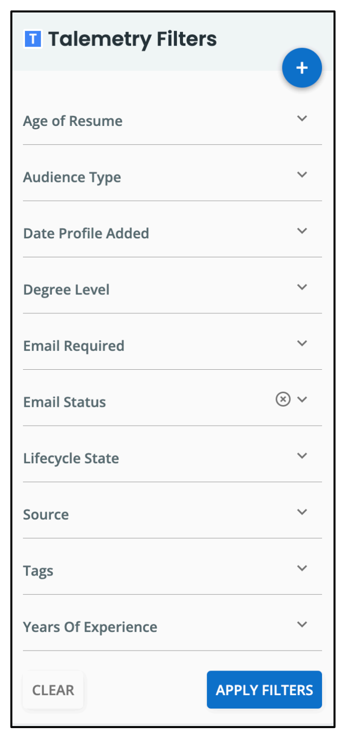




You can rename the search by clicking the Search Criteria action menu and selecting **Rename Search**. Enter the new name, then click **Save**.

NOTE: If you enter a name that already exists in your list of searches, you will be prompted to enter a different name.

Search Filters

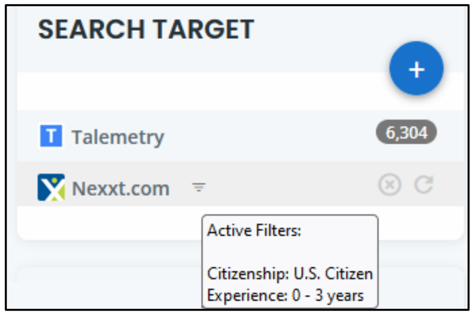


Evolve offers several filters that allow you to refine searches on your RM sources depending on your specific recruiting needs.

In addition to a standard set of filters provided by Evolve RM, customers can configure their own filters based on the ATS data or apply questions.

The Filters section can be configured in Source, Folders, Jobs, Talent Network, Import, Agency, Internal Mobility, and Referrals based on the company's needs. All other filters that are available in Evolve RM can be either placed under the **+** icon as an additional set of filters or removed from the use on that talent list (such as Consent and Candidate Engagement Score filters). When you add or change a filter in your search, you can click **Apply Filters** to regenerate results on the RM search target based on the new criteria.

When filters are applied on external search targets (Job Boards), the corresponding search target will show a filter icon with the details of the applied filters (hover over the icon to see the summary).



Tags

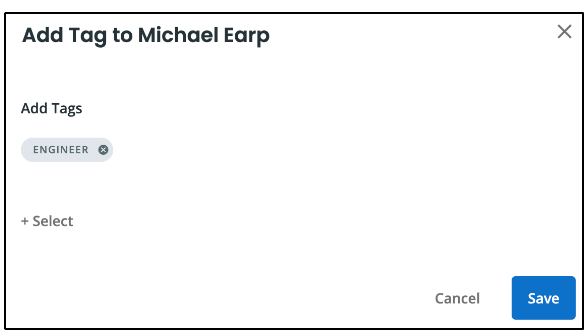
Tags are defined as candidate classifications or descriptors. Depending on your configuration, you can create user Tags as you work with candidates or choose from a company standardized list. Tags are tied to a candidate record and are visible to all users across the system. Tags are searchable as a keyword or when you use the Tags filter.

You can add Tags to single, multiple, or all candidates in a search or on any talent list.

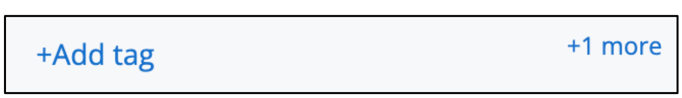
Add Tag to Single Candidate

Navigate to a candidate profile and click **+ Add tag**.

Depending on your configuration you can add a free-form text or choose from a defined list. Select a tag(s), then click **Save**.

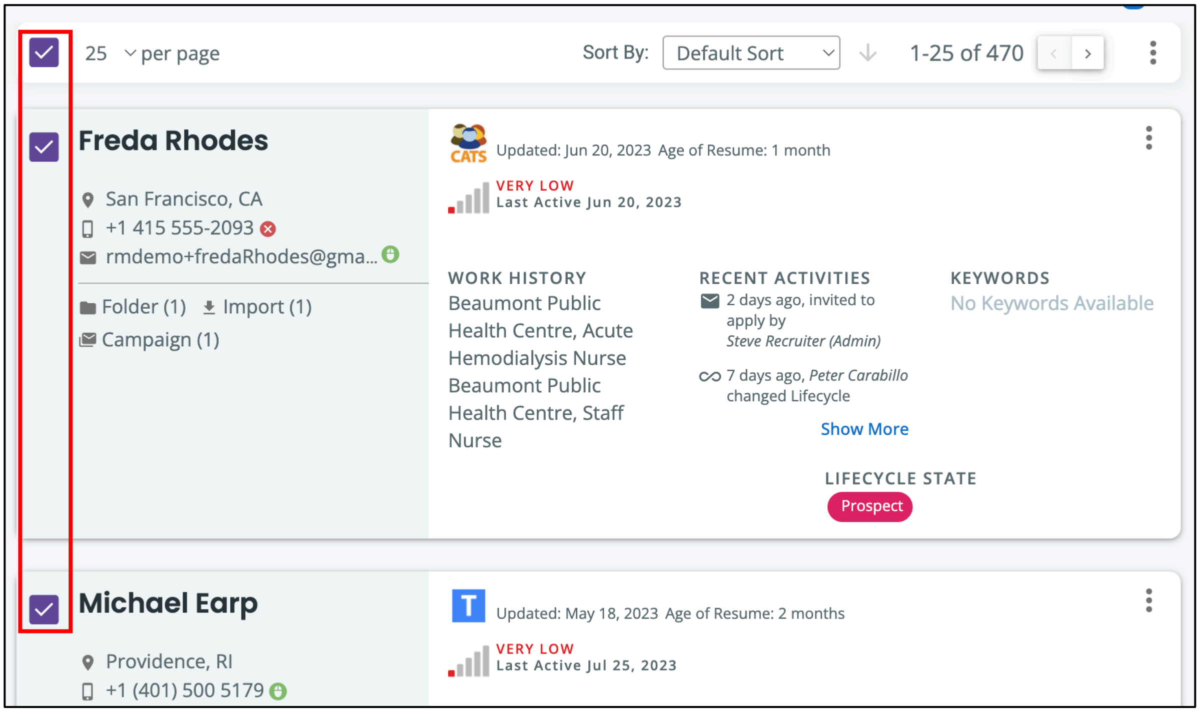


The tag(s) will be added to the candidate profile, searchable as a keyword, or through the Tags filter by all users in the system.

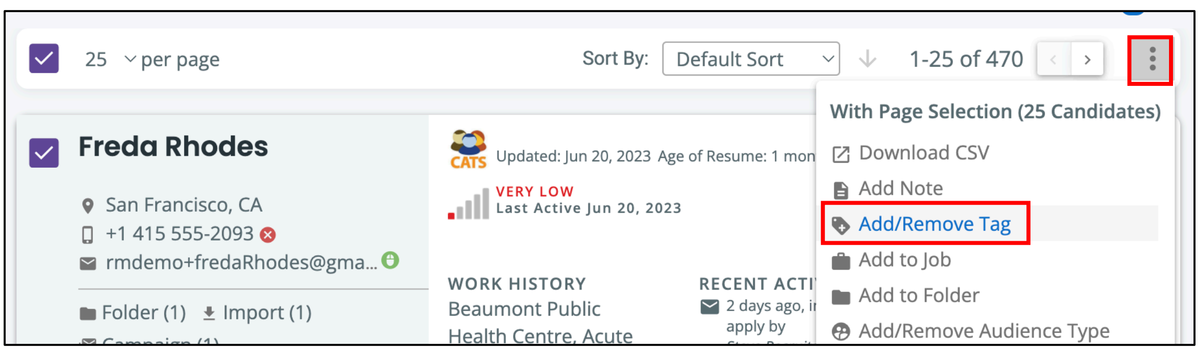


Add Tags to Multiple Candidates

Navigate to the candidate's list. Select the checkbox for the desired candidates or use the *select all* checkbox.



Click the action page action menu, then select **Add/Remove Tag**.



Depending on your configuration you can add a free-form text or choose from a defined list. Select a tag(s), then click **Save**.

*NOTE: You can also remove the tag(s) from multiple candidates using **Add/Remove Tag**.*

Notes

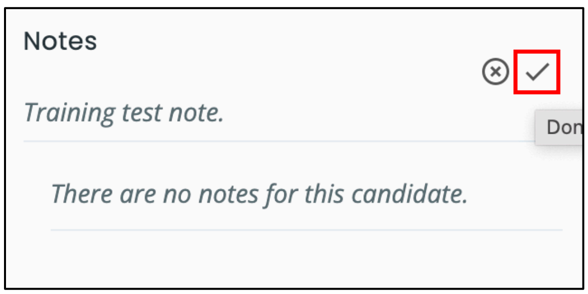
You can add freeform text **Notes** on candidate profiles as you work with them in Search or through your pipelines. Notes are visible to all users across the system and searchable through the Keyword field.

You can add Notes to single, multiple, or all candidates in a search or any talent list (Job, Folder, Talent Network, Import, Agency, Internal Mobility, or Referrals).

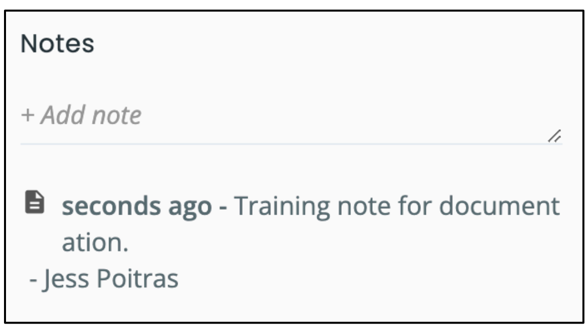
Add Note to Single Candidate

Navigate to a candidate profile and click **+ Add note**.

Add any notes needed for the candidate, then click the checkmark.

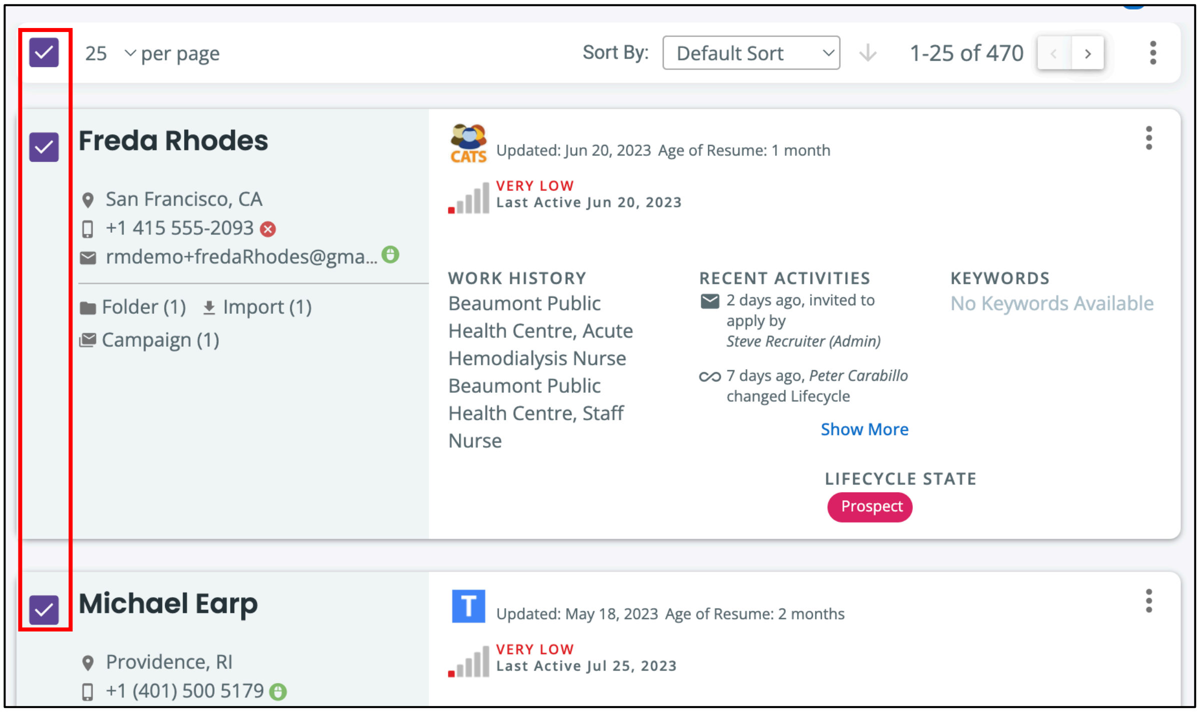


The note will be added to the candidate profile and viewable by all users in the system.



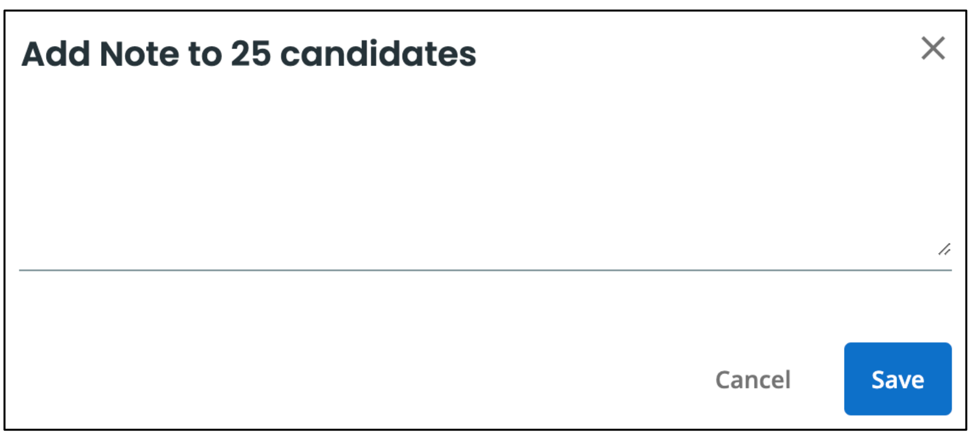
Add Note to Multiple Candidates

Navigate to the candidate list. Select the checkbox for the desired candidates or use the *select all* checkbox.



Click the action page action menu, then select **Add Note**.

Type the desired note for the selected candidates, then click **Save**.



Audience / Lifecycle

Audience & Lifecycle empower users to nurture and engage priority candidates more effectively. You can differentiate audience types across key talent, strategic, or relationship audiences – each aligned to your recruiting objectives and business goals. Candidates can be assigned to more than one audience and are attributed to a single lifecycle. Both types can easily be filtered, and access to the audience or lifecycle can be restricted to enable greater operational control.

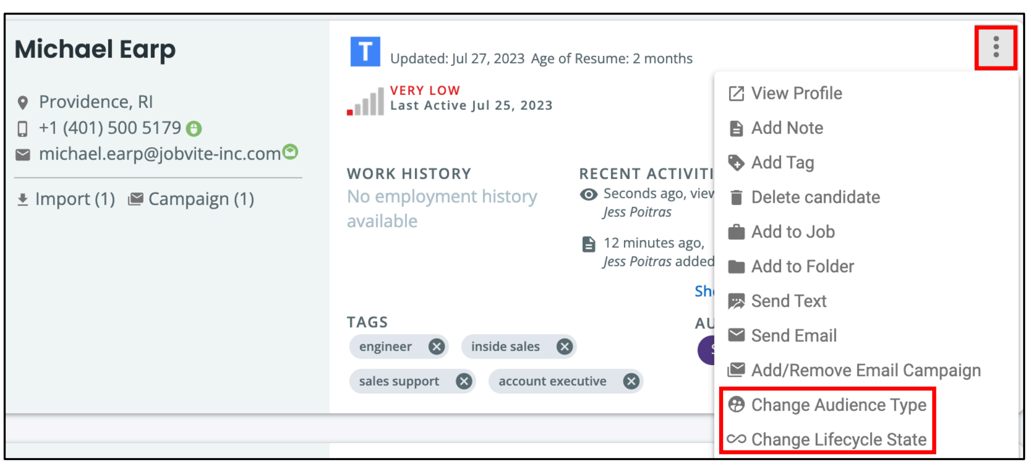
There are three different types of audiences that you should consider when looking to invest in current and future recruitment marketing opportunities.

- **Key Talent Audiences**: These audiences include volume jobs, targeted jobs, or critical jobs, including specific job families or geographies, to build content and campaigns, and approach from the six recruitment marketing process areas.
- **Strategic Audiences**: Many organizations today have started providing candidate engagement content or enacting inbound and sourcing strategies to strategic audiences. These can include diversity & inclusion candidates, university relations audiences for students, grads or interns, veterans and military hiring, or strategic audiences around executive hiring.
- **Relationship Audiences**: These include candidates that you already have a known relationship with, including employee referrals, internal employees, alumni, the contingent workforce, and past applicants, like silver medalists and high-potential candidates. Organizations that are more mature in their recruitment marketing activities also may focus on existing customers for relationship-based marketing and recognize that the candidate-consumer connection impacts how they interact with individuals as both a candidate and a customer.

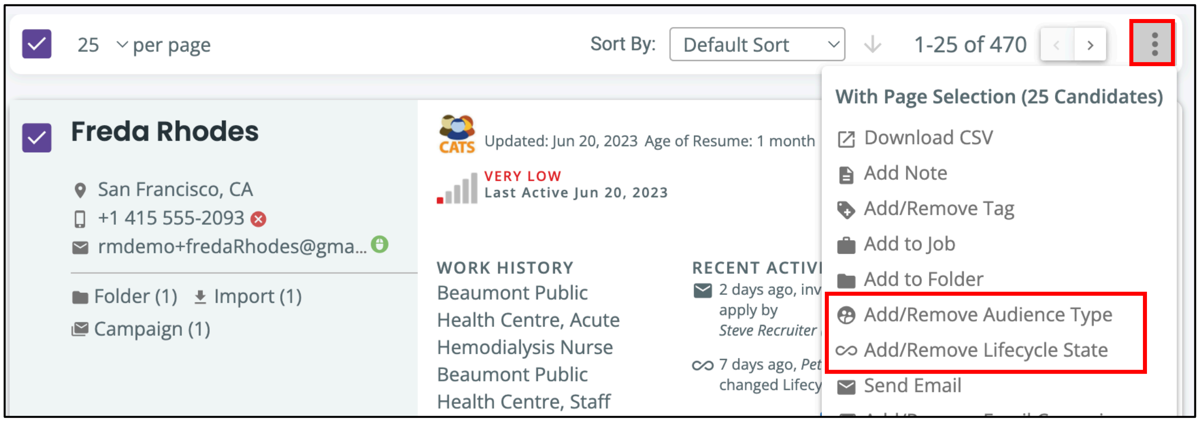
Add Audience and/or Lifecycle

Click the action menu for a single candidate profile or multiple candidates using the candidate list page action menu.

Single Candidate Profile Action Menu - select either **Change Audience Type** or **Change Lifecycle State**.

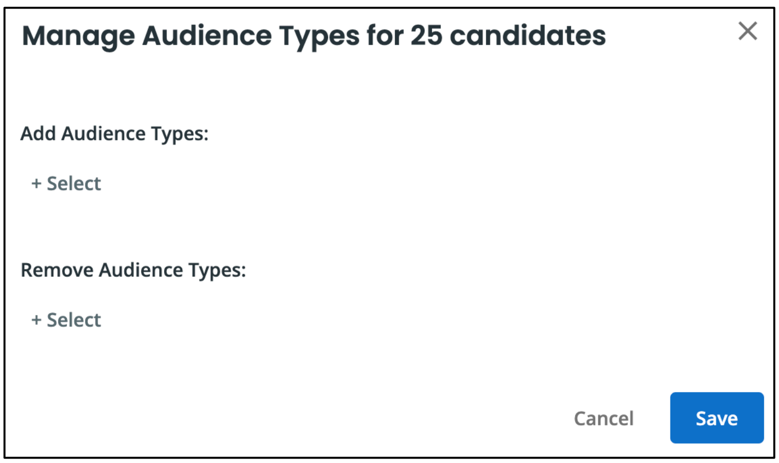


Page Action Menu for Multiple Candidates - select either **Add/Remove Audience Type** or **Add/Remove Lifecycle State**.



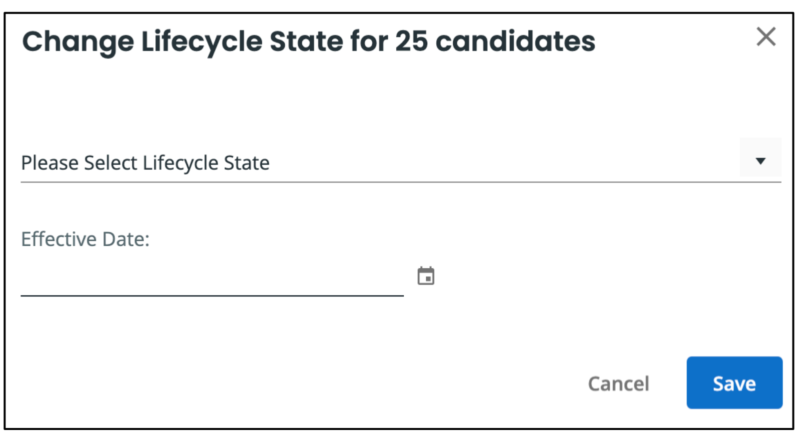
Audience Type

Add one or more desired Audience Types from the predefined options, then click **Save**.



Lifecycle State

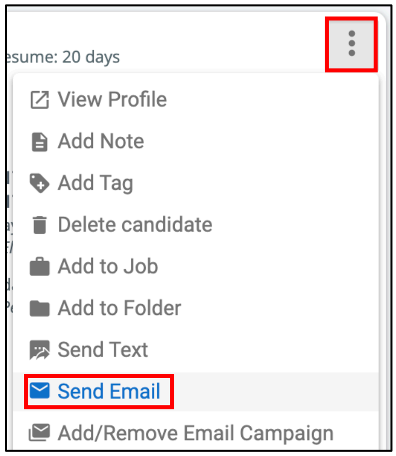
Select a Lifecycle State and the date associated with the change, then click **Save**.



Send Email

The Send Email option allows a recruiter to send an email to one or more candidates.

Select **Send Email** from the menu on a single candidate or select candidates on any talent list and select **Email Selected** from the page action menu.

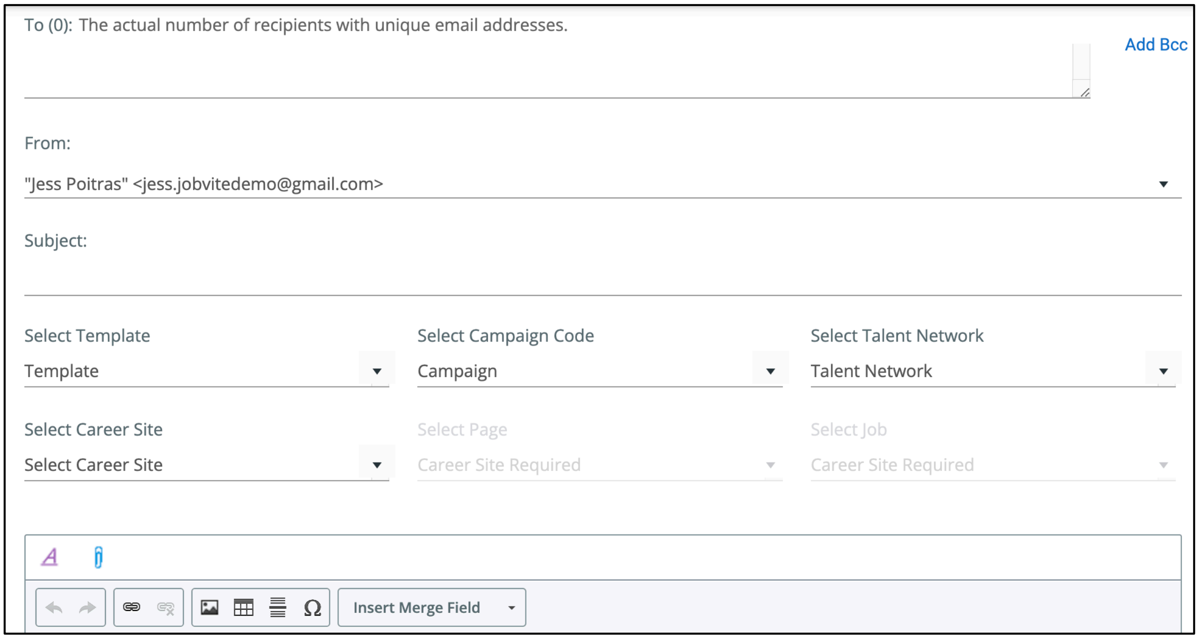


The Send Email window opens. Complete the following fields:

- **To** – Shows the list of recipients with unique email addresses. The number of unique email addresses where the email will be sent is shown in the field label.
- **Add Bcc** - This allows you to add BCC recipients to the email. Click the **Add BCC** link to see the BCC field. To remove BCC addresses from the email click **Hide BCC**.
- **From** - Shows the name of the user who is sending this email. You can change the sender by choosing another user from the dropdown list, or by typing the email address in the **From** field. The selected sender will show in the email details on the Profile Messages tab and will be used to resolve Recruiter merge fields.
- **Subject** – Add the subject of the email.
- **Select Template** – (optional) To apply a template to your email, select it from the **Select Template** field.
- **Insert Merge Field** - You can insert any number of merge fields into your email. To insert a merge code, click **Insert Merge Field** from the *edit* panel over the email body field and select a merge code from the provided list.
- If your email has merge codes for Job, Talent Network, or Career Site, you need to select the value for the merge code from the corresponding dropdown field.
- **Select Campaign Code** - If you want to link your email to a campaign code for performance tracking, select the campaign name from the list of published campaigns for the company.
- Add an attachment to your email by clicking the attachment icon above the email body field. The maximum allowed size of all attachments is 10MB.
- Once your email has been configured, you need to specify the type of the email: **General** or **Invite to Apply**.

- **Delay sending this Email** - If you do not want this email to be sent immediately, you can specify the date and time when this email will be sent out.
- **Preview** - You can preview your email before it is sent to ensure the email is correct and merge fields are resolved correctly.

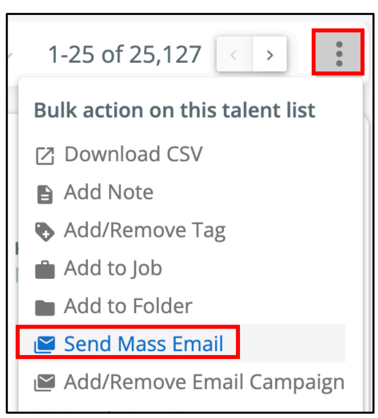
Click **Send** on the *Send Email* dialog to send or schedule your email.



Send Mass Email

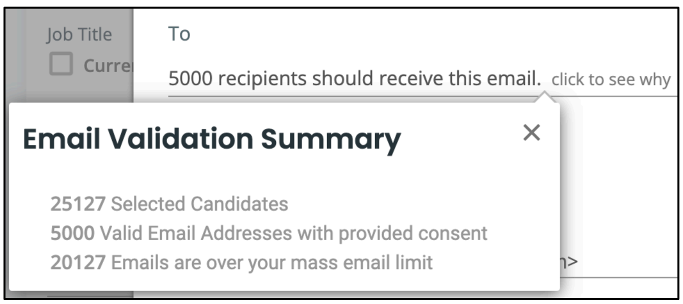
Users with the Mass/Drip Email privilege can send emails to thousands of recipients at a time. The email will be sent out in daily batches (2,500 on day one, 10,000 on day two, and 25,000 on subsequent days until complete) at the time specified when the email is created. Once the email is created and scheduled, users can check its performance, pause it, reschedule it, or cancel it from the Mass Email screen.

Select **Send Mass Email** from the page action menu (do not select any candidates from the talent list).



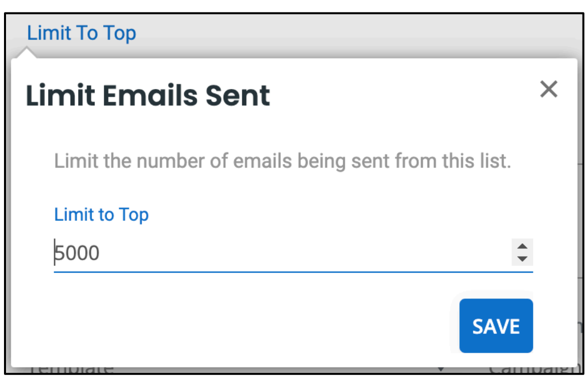
The Send Mass Email window opens. Complete the following fields:

- **Mass Email Name** – This name is used throughout Evolve RM to reference this mass email. It defaults to the Name of the Talent List or Search, along with the current date.
- **To** – The number of recipients that will be sent the mass email. The number is calculated from the following:
    - The total number of candidates in the Search or Talent List.
    - Less: The candidates without emails.
    - Less: The candidates with invalid email status (including invalid format, and previous bounces).
    - Less: The candidates who have unsubscribed from communications.
    - Less: The candidates who have registered a previous email communication from the recruiter's company as *Spam*.
    - Less: The candidates who have not provided consent to be contacted via email (Email Consent = NO).
    - Select **click to see why** to view the details.



NOTE: The number of recipients cannot exceed the single mass email limit configured for the company.

- **Limit To Top** – This option allows the recruiter to send the email to the top-ranked results in the list, up to the number they choose. This is useful if you have a search that returns a large number of candidates, and you want to contact a limited number of the highest ranked candidates.
    - This field defaults to the number of valid email addresses in the list, or the single mass email limit, whichever is smaller.



- **Add Bcc** - This allows you to add BCC recipients to the email. Click the **Add BCC** link to see the BCC field. To remove BCC addresses from the email click **Hide BCC**. Each BCC email is added to the total number of emails sent in a batch, and to the overall total for the mass email.
- **From** - Shows the name of the user who is sending this email. We recommend updating to a valid email address that is not a person (group email, campaign-specific email). You will need to set up the email address in advance.

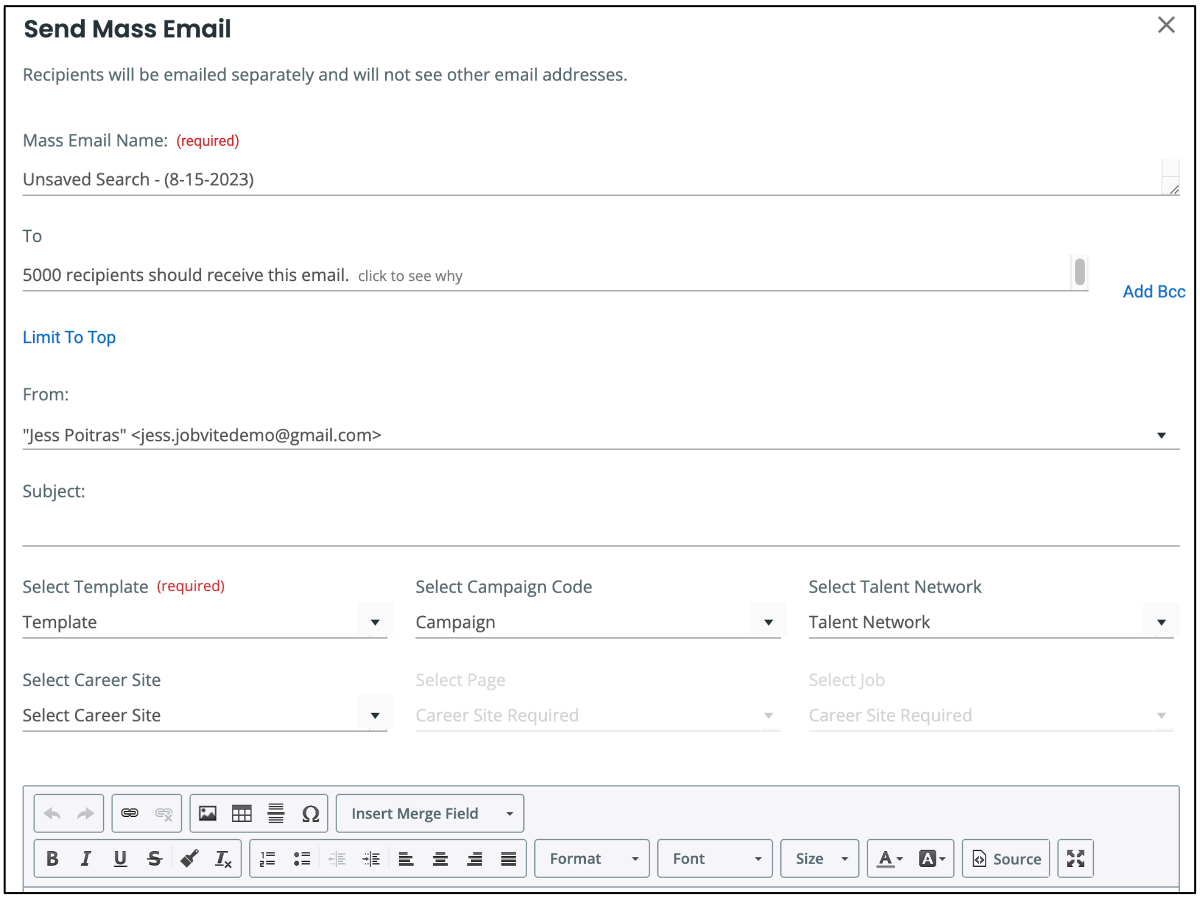
  NOTE: Recruiter merge codes included in the email use the data of the Sender selected in the From field. If your email is supposed to be sent from a no-reply email, make sure that the email does not have recruiter merge codes.
- **Subject** – (required) The Subject field is populated with the subject saved on the selected email template.
- **Select Template** – Choose from Candidate templates that have been published in the company.

  NOTE: If you select New Template or Manage Templates, you will be redirected to the email templates management screen and your changes on the Send Mass Email window will be lost.
- **Select Career Site** – This field is populated with the career site (or system default job list) defined on the selected email template. You can select a different career site.
- **Select Page** – If your email has career site page merge codes, select a page from the list of pages available for the selected career site.
- **Select Job** – If your email has job merge codes, select a job from the list of jobs available for the selected career site or the system default job list. Start typing the job title of the Job ID to find the matching job.

  NOTE: Users without the Confidential Jobs privilege in Jobs will not see confidential jobs in the dropdown list.
- **Select Campaign Code** – (optional) Linking a mass email to a Campaign is useful to help report on the progress of the mass email. We recommend using either a new/unique Campaign for each mass email or use a shared/common campaign code when the mass email is part of a larger initiative that includes more than one mass email or other activities.
- **Select Talent Network** – If your email has a Join Talent Network URL merge code, you must select a Talent Network to resolve the merge code.
- **View email body** – A preview of the selected email template is shown. You can edit the email content as needed.

  NOTE: Any changes made within the email will not update the original email template.
- **Schedule Start** – Choose the scheduled start date and time, then define whether the batches should be sent on weekends. You can choose to start sending the email immediately, or you can specify the date and time of the first batch. The start time of the first batch will be used for subsequent daily batches.
- **Send email at later time** – Select this option to specify a start date and time of the email with the default option being approximately 1 hour 30 minutes into the future on the current date.

- **Send email immediately** – If this option is selected, sending of the first batch will start within the next 5 minutes.
- **Allow sending batches on Saturdays and Sundays** – You can select this option in addition to either delayed or immediate schedule start if you want your subsequent batches to be sent over the weekend. By default, Evolve RM is not sending subsequent batches on Saturdays and Sundays to maximize the click-through rates.
- **Preview** - You can preview your email before it is sent to ensure the email is correct and merge fields are resolved correctly.



Click **Save & schedule** to save the email.

Send Text

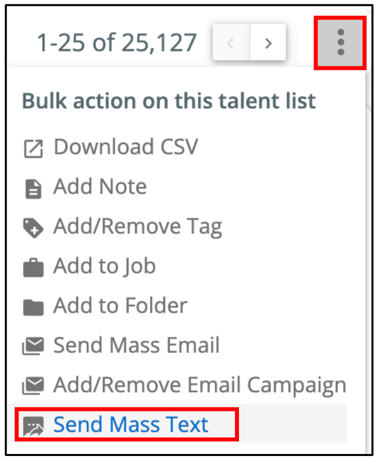
The Send Text allows a recruiter to send a single text message to one or more selected candidates via the Intelligent Messaging Widget.

For more information on how to use the feature, please see the *Intelligent Messaging Quick Start Guide* in the LMS or Helpdesk (users must be logged in to access content).

Send Mass Text

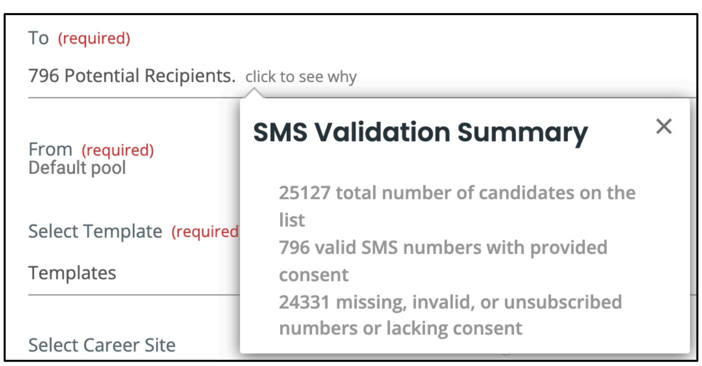
The Send Mass Text feature allows a recruiter to send a mass text to a large group of candidates. Mass text is sent in daily batches (5,000 on day one, 25,000 on all subsequent days until complete).

Select **Send Mass Text** from the page action menu (do not select any candidates from the talent list).



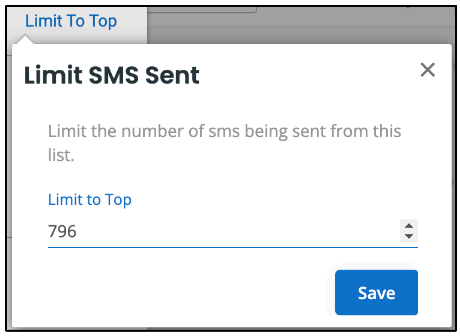
The Send Mass Text window opens. Complete the following fields:

- **Mass SMS Name** – This name is used throughout Evolve RM to reference this mass text. It defaults to the Name of the Talent List or Search, along with the current date.
- **To** – The number of recipients that will be sent the mass text. The number is calculated from the following:
    - The total number of candidates in the Search or Talent List.
    - Less: The candidates without SMS-enabled phones.
    - Less: The candidates with invalid SMS status (including invalid SMS number format, and previous bounces).
    - Less: The candidates who have unsubscribed from SMS communications.
    - Less: The candidates who have not provided consent to receive SMS communications.
    - Select **click to see why** to view the details.



NOTE: The number of recipients cannot exceed the single mass SMS limit configured for the company.

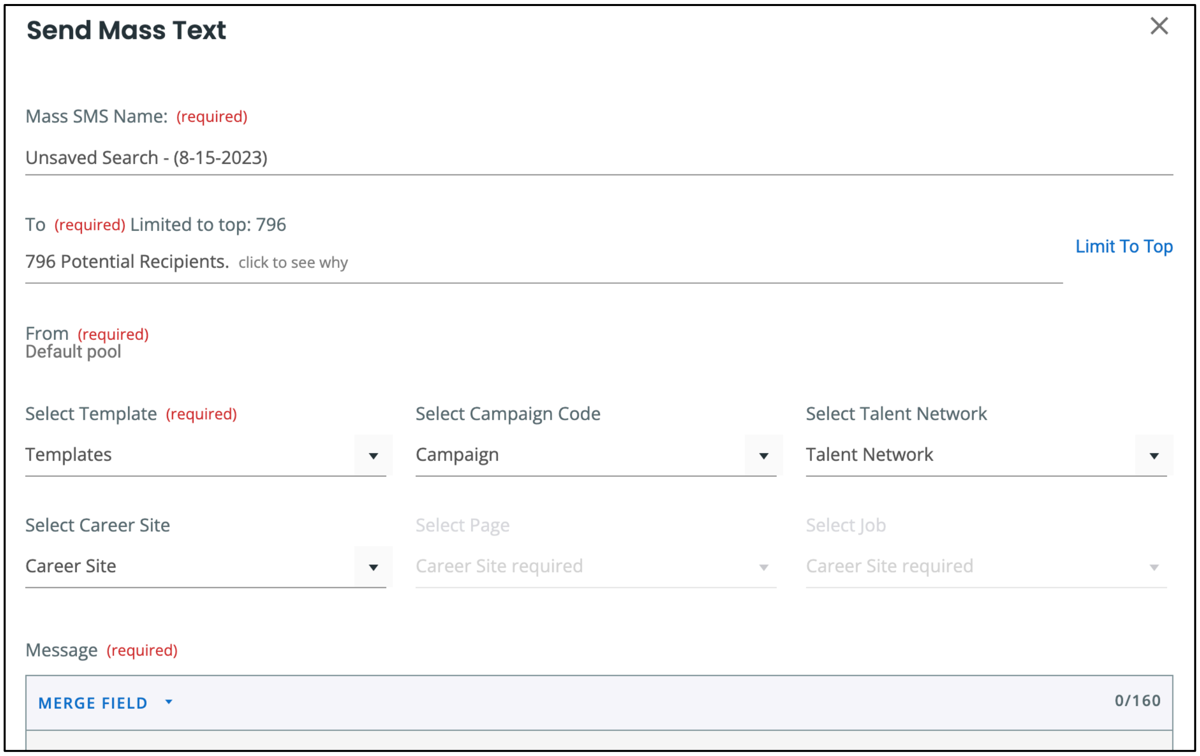
- **From** – This is the From number for the mas text.
- **Limit To Top** – This option allows the recruiter to send the text to the top-ranked results in the list, up to the number they choose. This is useful if you have a search that returns a large number of candidates, and you want to contact a limited number of the highest ranked candidates.
    - This number defaults to the full number of valid SMS numbers in the list, or the single mass SMS limit, whichever is smaller.



- **Select Template** – Choose from SMS templates that have been published in the company.
- **Select Campaign Code** – (optional) Linking a mass text to a Campaign is useful to help report on the progress of the mass text. We recommend using either a new/unique Campaign for each mass text or use a shared/common campaign code when the mass text is part of a larger initiative that includes more than one mass text or other activities.
- **Select Talent Network** – If your SMS Template has a Join Talent Network URL merge code, you have to select a Talent Network to resolve the merge code.
- **Select Career Site** – This field is populated with the career site linked to the selected SMS template. The field is editable, so you can select a different Career Site.
- **Message** – After selecting a template, you can edit the content or select a merge field, if needed. It is highly recommended to use a previously defined and vetted template, not make any edits, and not use variable merge codes like Candidate First or Last Name.
- **Schedule Start**
    - Mass text messages are broken into batches and each batch will be sent daily at the time chosen by the user on the Send Mass Text dialog.
    - **Send SMS at later time** – Select this option to specify the date and time of the first batch. The default option is the current date and the scheduled start time approximately 1hour 30minute into the future. You can select any future date or time for the first batch. Subsequent batches will be sent daily at the same time.
    - **Send SMS immediately** – Select this to start sending the SMS immediately. Subsequent batches will be sent daily at the same time.
    - **Allow sending batches on Saturdays and Sundays** – By default, Evolve RM does not send subsequent batches on Saturdays and Sundays to maximize the click-through rates. Select this option if you want to send the batches on weekends.

- **Auto-response** – You can configure your Mass Text with an auto-response that will be sent to the candidate who replied to that text message. The auto-response must use an SMS template.

  NOTE: Job or Career Site merge fields are not allowed in auto-response templates.



Click **Save & schedule** to schedule the mass text.

Add/Remove Email Campaign

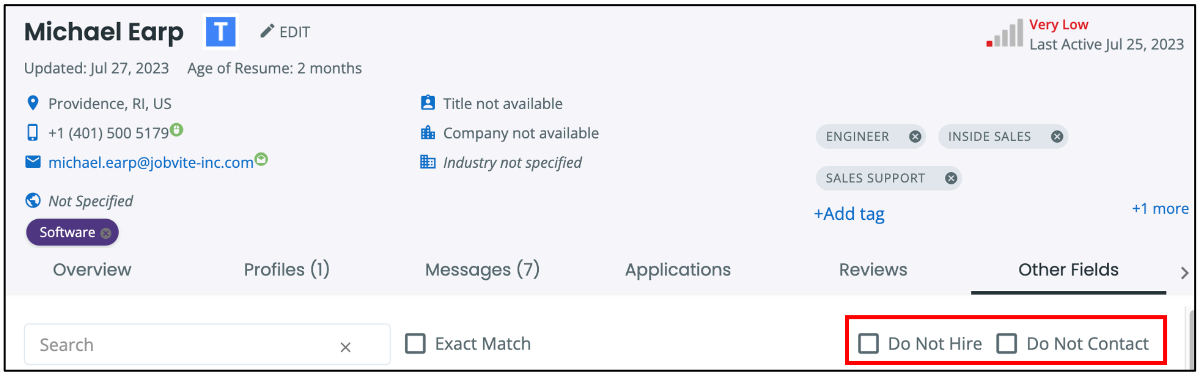
The Add/Remove Email Campaign combined action dialog allows users with Mass/Drip Email privilege in Source to add candidates to an email campaign or remove candidates from multiple email campaigns. Users can perform one action at a time, or they can select in both *Add* and *Remove* sections of the dialog and perform both actions on one set of candidates.

For more information on how to use the feature, please see the Email Campaign User Manual in the Helpdesk.

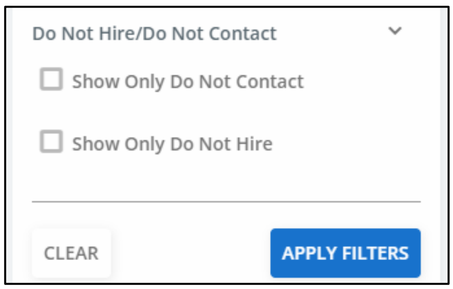
Do Not Hire / Do Not Contact

Additional fields that may need to be used in specific cases include **Do Not Hire** and **Do Not Contact.** Using these controls will prevent recruiters from inadvertently contacting the candidate or considering them for a position when a legitimate reason arises.

NOTE: Candidates that are marked with either Do Not Contact or Do Not Hire will always be filtered out in searches and on Talent lists.



You can use the Do Not Hire/Do Not Contact filter to view candidates that have either of these two settings.

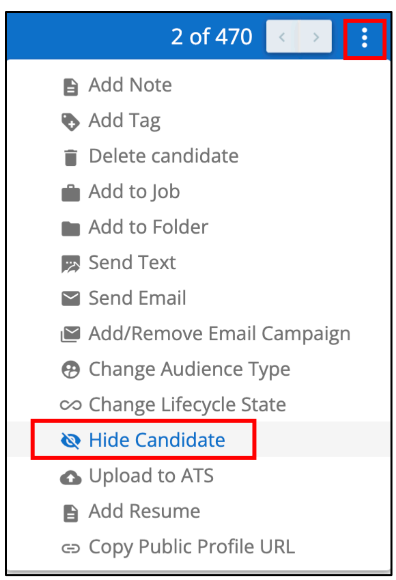


Hide/Un-hide Candidates

Hide Candidate

To hide a profile from a saved Search, Folder, or Talent Network, click the action menu on the profile or candidate result, then click **Hide**. The profile will be removed from the candidates' list.

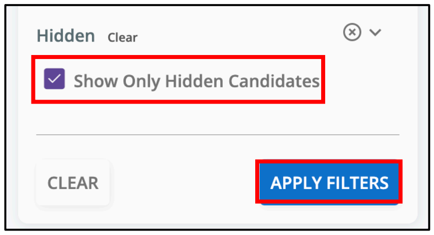
NOTE: The candidate will be visible in other lists or searches.



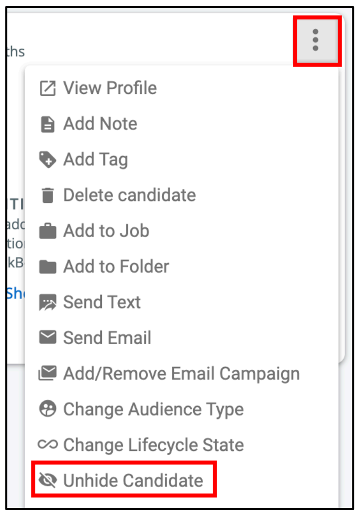
Un-hide Candidate

To un-hide a profile from search results, use the *Hidden* filter.

Select **Show Only Hidden Candidates**, then click **Apply Filters**.



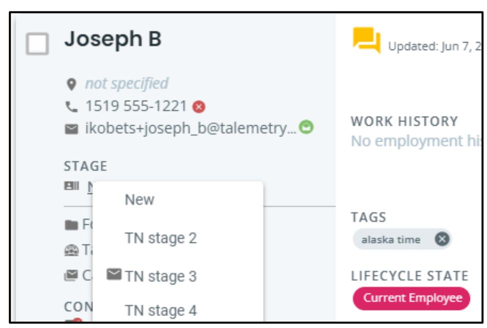
Hidden candidates will be returned with this filter. Click the candidate action menu and select **Unhide Candidate**.

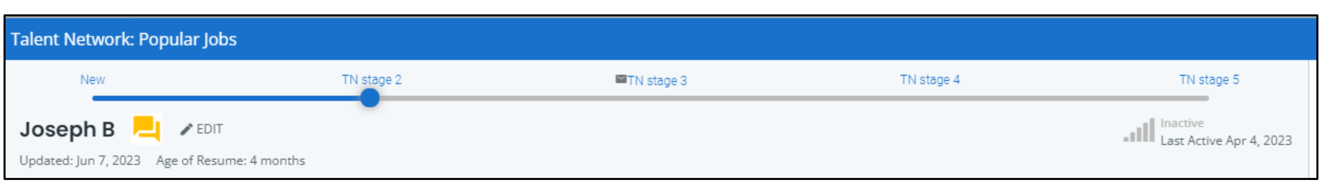


Candidate Stages

Candidate Stages provide insight into candidate progress through a hiring workflow. Stages are used for the pre-application process. They can be configured in Folders, Talent Networks, Jobs, Candidates Lists, Internal Mobility, and Imports.

When you view candidates on the lists where stages are configured, you can see and change the stage on a candidate's summary or profile.





Auto-email

The **Auto-email** feature provides some automation to help users with pipeline building and candidate outreach. An auto-email configured on a Talent list is sent out to candidates when they are added to that talent list. If the talent list has CRM stages set up, auto-email can be configured for each stage and will be sent out when a candidate is moved to that stage. An auto-email can be configured as a one-time email or a sequence of emails.

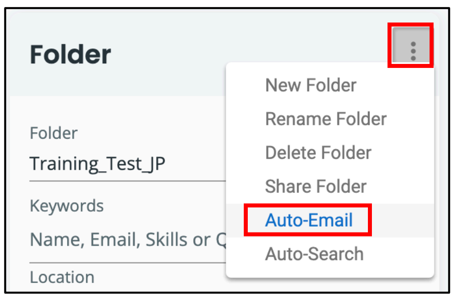
Auto-email can be configured in the following talent modules:

- Folders
- Job Candidate Lists
- Talent Networks
- Internal Mobility

Set Up Auto-email

Open a list where you need to set up an auto-email: a Folder, a specific Talent Network, a Job Candidates list, or an Internal Mobility list.

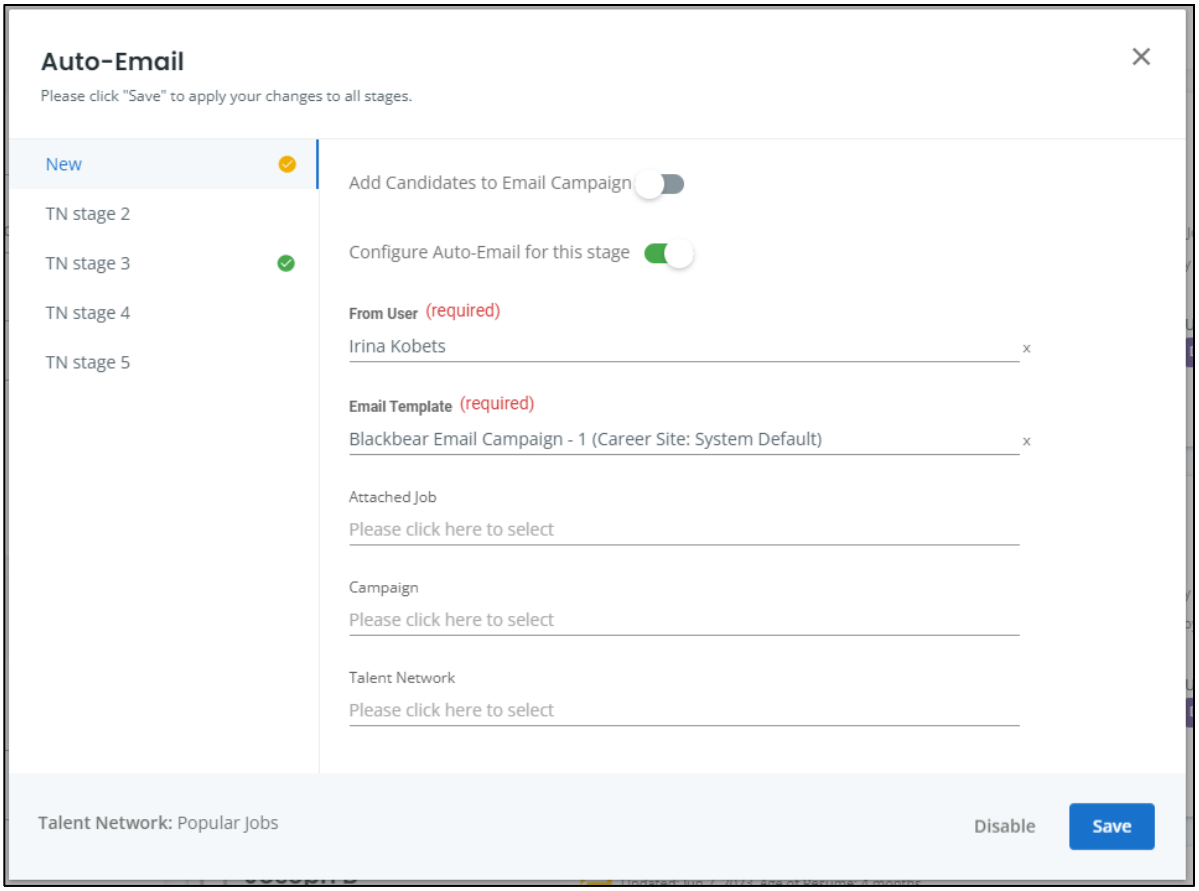
Click the action menu in the search area, then select **Auto-Email**.



In the Auto-Email window, toggle-on the **Configure Auto-Email**.

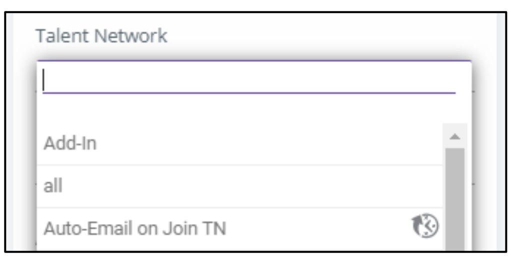
Complete the following fields:

- **From User** – Select a username from the displayed list.
- **Email Template** – Select an email template from the displayed list.
- **Attached Job** – If the selected email template has job merge codes, select a Job.
- **Campaign** – Optionally, select a campaign for tracking purposes.
- **Talent Network** – If the template has Talent Network merge codes, select a Talent Network.

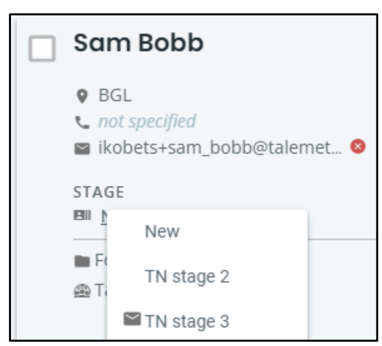


Click **Save**. The auto-email is set up and ready to use immediately.

The lists where auto-email is configured have an auto-email indicator.



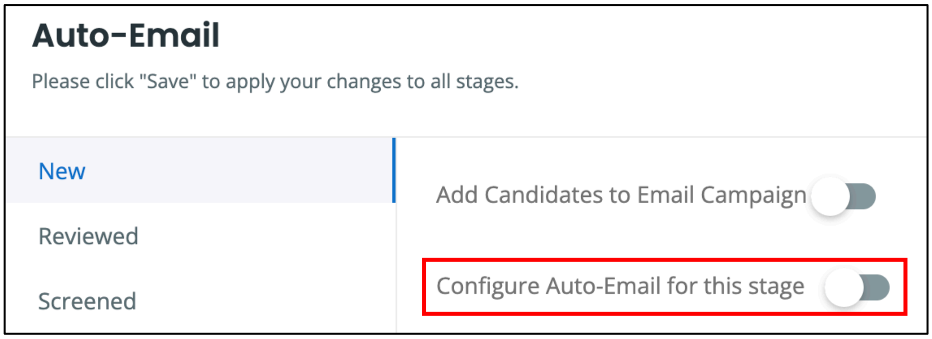
If an auto-email is configured on a stage of a talent list, an auto-email indicator is displayed on that stage on the candidate's summary and profile.



Turn Off Auto-email

To turn off Auto-email, click the action menu and select **Auto-email**.

In the *Auto-Email* window, toggle-off the **Configure Auto-Email** setting.



NOTE: The auto-email setup will be remembered so the next time you switch it to ON, the previous setup will be displayed.

Using Auto Email

It is recommended that you test your auto-email configuration upon setup. It is a good practice to ensure that the message a candidate will receive is appropriate and renders well on your email client.

Use Email Campaign as Auto Email

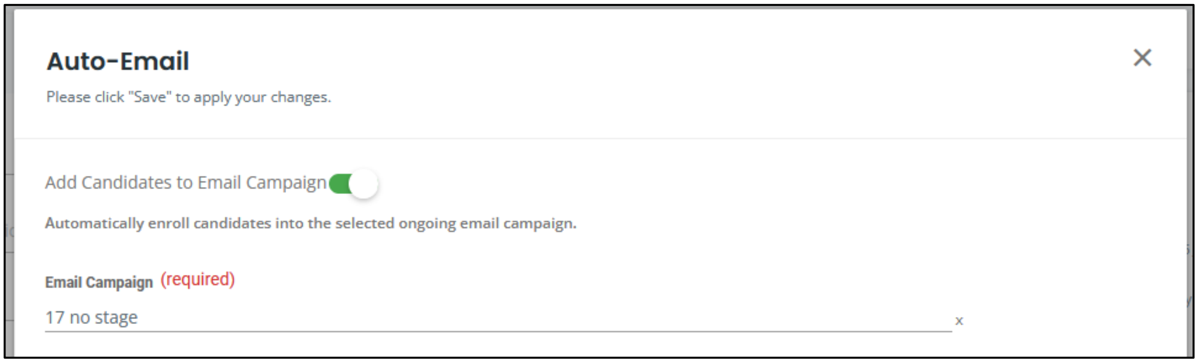
Auto-email can be configured to automatically add recipients to an ongoing email campaign instead of sending them a single email. The first email of the campaign is sent when a candidate is added to the talent list with the auto-email setup, and subsequent emails are sent according to the campaign schedule. This option is available with CRM Stages configuration or without it and is only accessible by users with Mass/Drip Email privilege in Source. Each CRM stage can only have one auto-email type configured, either a single email or an email campaign, but you can have a combination of auto-email types configured for different CRM stages of a talent list.

To use an email campaign in auto-email:

On a talent list where the setup is being done, select **Auto-email** from the menu on the Search Criteria panel.

On the Auto-Email dialog, toggle-on **Add Candidates to Email Campaign**.

Select an email campaign from the dropdown.



Configure auto-emails for all CRM stages as needed, then click **Save**.

Enable Auto-Email from Last CRM Stage in Job to Candidates who Applied via Career Site or ATS

By default, candidates who apply for a job from a Career Site or via ATS are automatically added to the last CRM Stage on the Job Candidates List and don't get an auto-email configured on that job Applied Stage. You can bypass this rule and allow sending auto-email to such candidates.

Open the Job where you need to configure the auto-email.

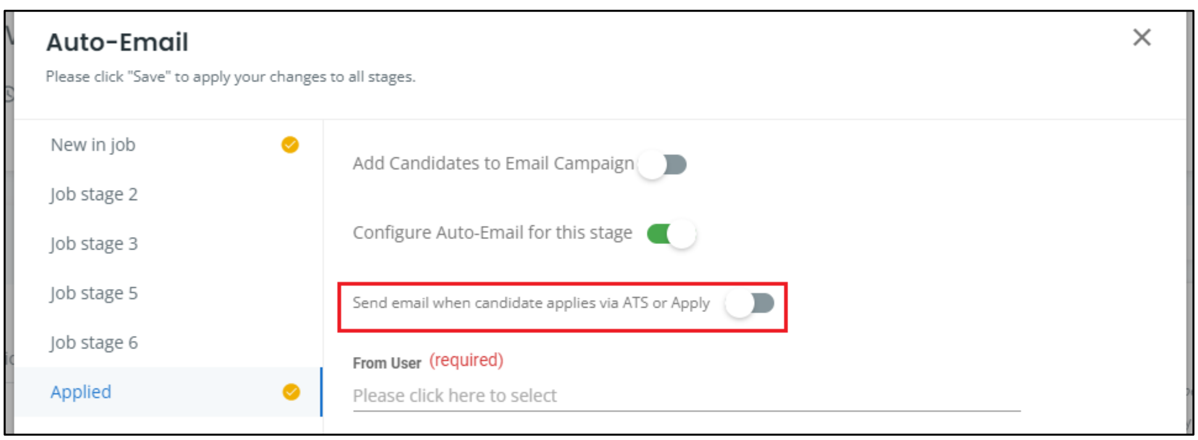
Select the **Candidates** tab.

Open the action menu in the search area, then select **Auto-Email**.

The Auto-Email window will open. Select the last stage.

Toggle-on **Configure Auto-Email for this stage**.

Toggle-on **Send email when candidate applies via ATS or Apply.**



Proceed with the auto-email setup, then click **Save**.

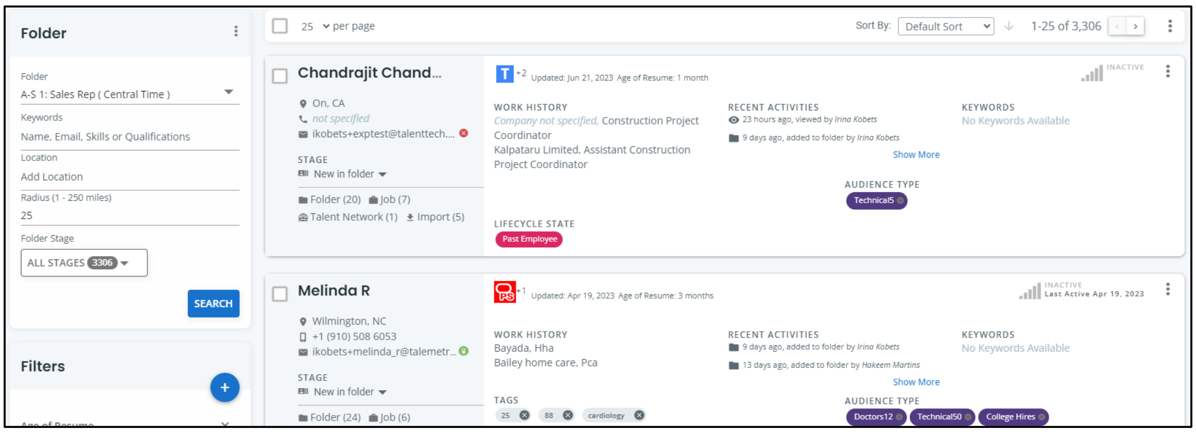
The auto-email configured on the last CRM stage will be sent when the candidate is added to that stage automatically after applying for the job via the Career Site or ATS as well as when they are moved manually to the Applied stage in that job.

Folders

Evolve RM allows users to create their own static lists of candidates and save them into **Folders**. Folders are used to group like candidates. Examples might include candidates who meet specific criteria for specific positions or skill sets. Once in a Folder, users can manage candidates through a defined process, nurture Talent Pipelines, or perform many different actions.

Folders can be created while working with candidates in Source or from the Folder menu. Candidates can be added to a Folder individually or in groups.

The structure of the Folders module is very similar to the structure of the Source module. The list of Folders linked to your user account (either created by you or shared with your user by any other RM user from your company) is available from the Folder dropdown. When you select a Folder that has candidates, the list of candidates is displayed in the results panel.

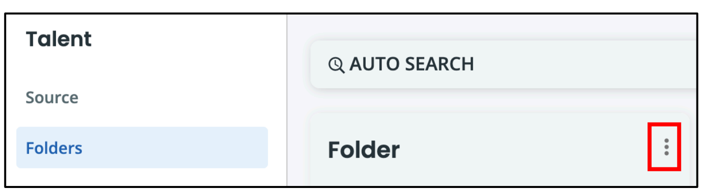


Folder Stages

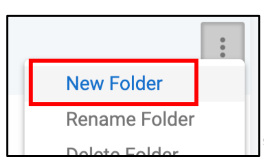
Folders can have up to eight CRM workflow stages. Once configured for the company, CRM stages are available to all Source & CRM users. Customers are encouraged to work with Evolve RM to set up CRM Stages.

Create New Folder

Click the action menu within the Folder search.



Click **New Folder**.



,

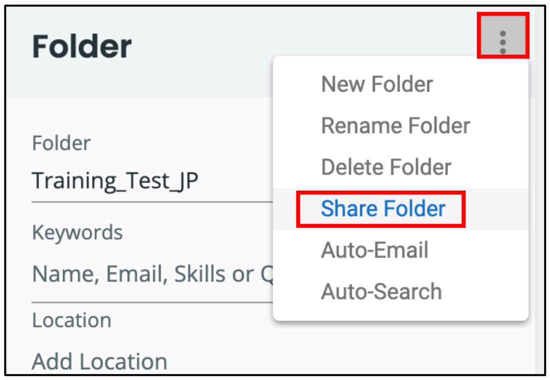
Enter the *Folder Name*, then click **Create Folder**.

NOTE: Alternatively, folders can be created with the Add Candidates to the Folder action.

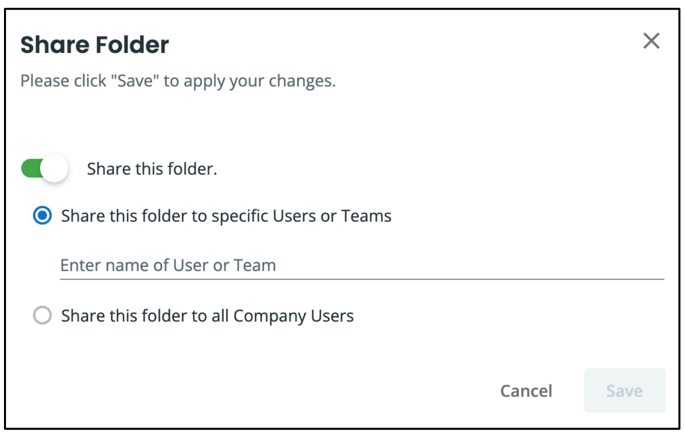
Share Folder

Folders can be shared with all or specific users. You can limit folder access at any time.

Open the folder you want to share, then click the action menu → **Share Folder**.

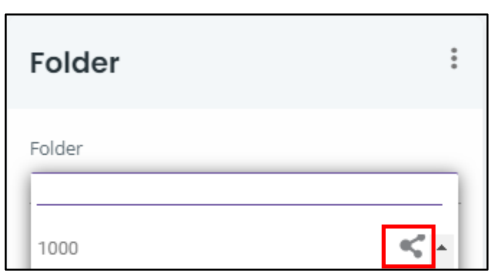


Toggle-on. Select if the folder will be shared with specific Users/Teams of all Company Users.



Enter the name of the User or Team. Click **Save**.

When you view your folders, the ones shared with other users have an indicator.

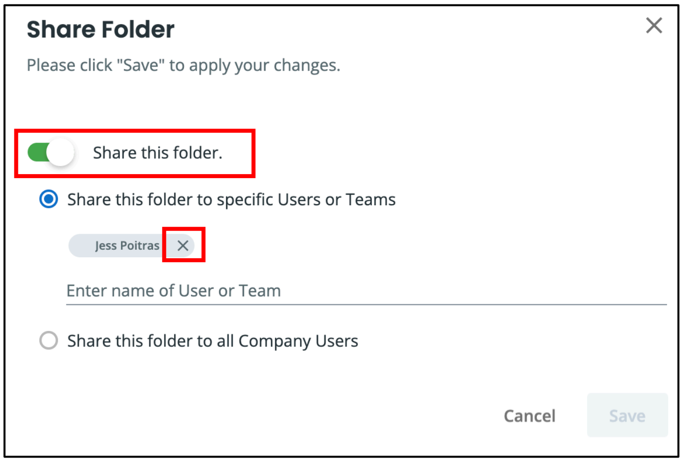


The Share Folder menu option will be checked for the shared folder.

Remove Shared Users from Folder

You can un-share the folder you have previously shared with a user or team. Click the action menu for the folder, then click **Share Folder**. You can either:

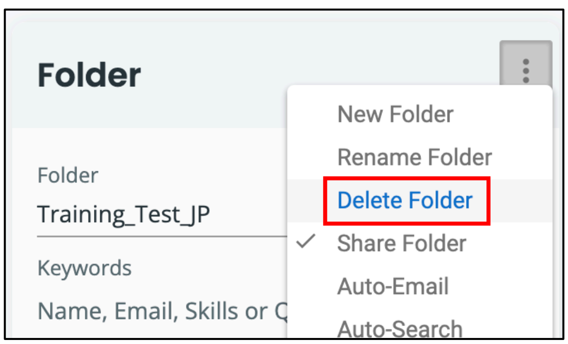
- Click **X** next to the user's name to remove a user or team, or
- Turn the *Share this folder* toggle-off if you no longer want it to be shared



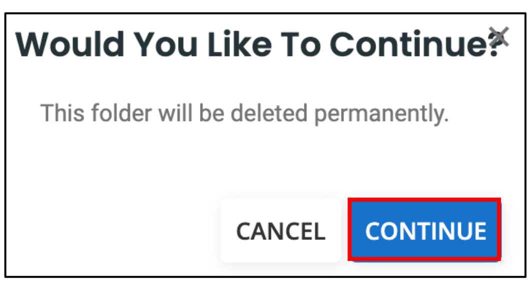
Click **Save**.

Delete Folder

Users can delete any folder they own. Open the folder, then select the action menu → **Delete**.



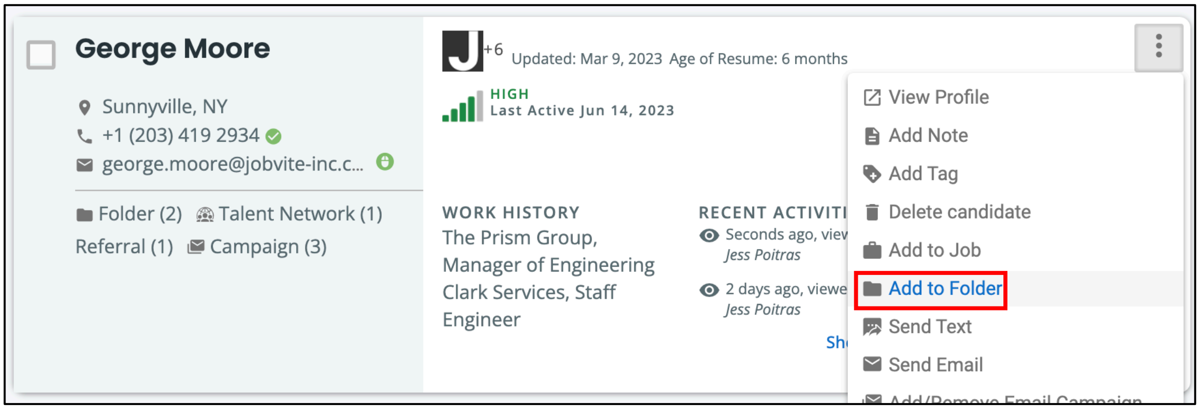
Confirm the deletion by clicking **CONTINUE**.



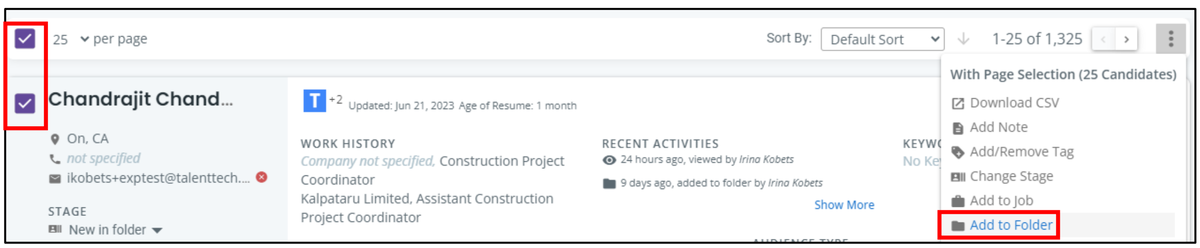
NOTE: Deleting a folder will not delete the candidates in that folder.

Add Candidates to Folders

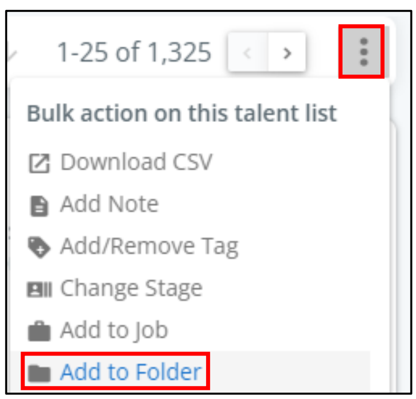
You can add candidates to a folder using **Add to Folder** in the action menu available on the profile or candidate summary.



To add multiple candidates to a folder, select all or individual candidates on the page and use **Add to Folder** on the page action menu.



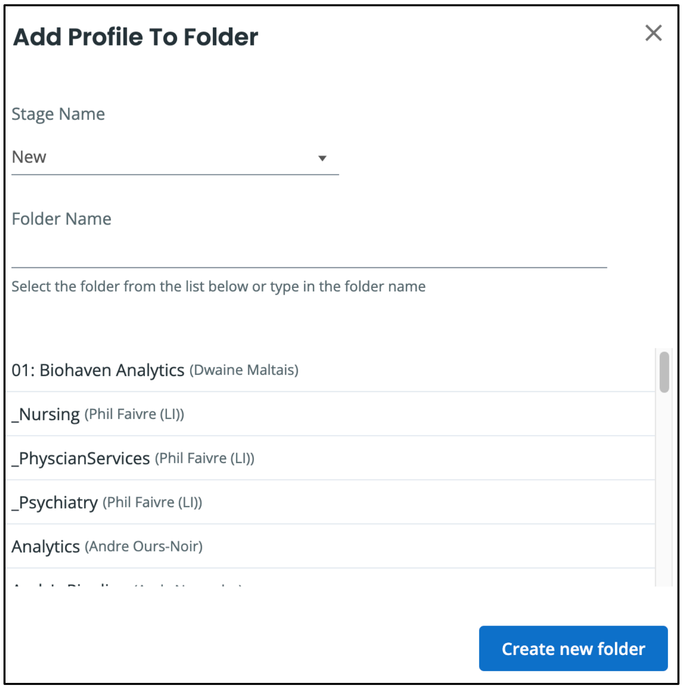
You can also add all candidates on your list (up to 25,000 at a time) to a folder. Don't select any candidates on the page and use **Add to Folder** in the bulk actions menu.



Complete the following in the **Add Profile to Folder** pop-up:

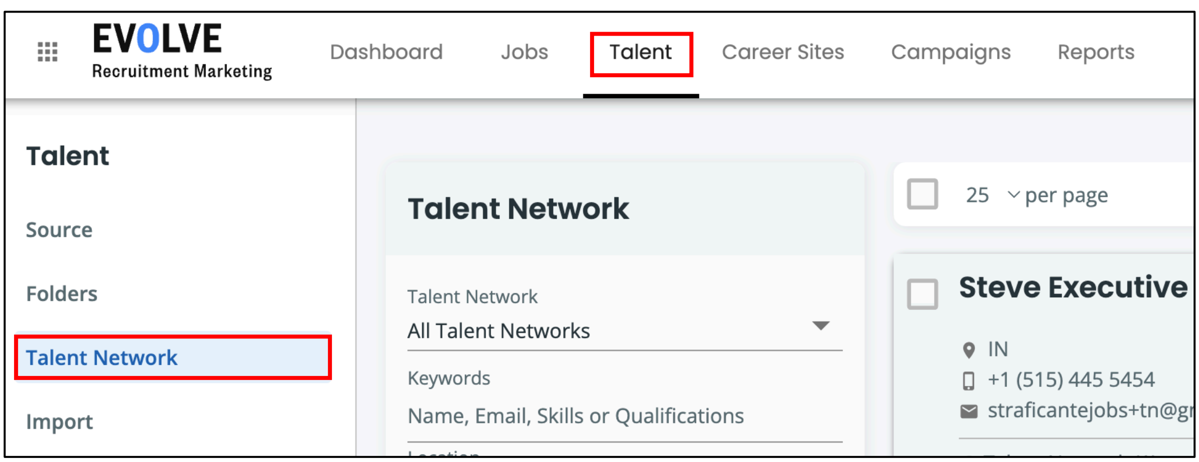
- **Stage Name** – Optionally, select a CRM stage where you want to add the candidate. If not selected, the default stage is *New*.

- **Folder Name** – Select the folder from the list below or type in the folder name. If the folder that name does not exist, *type the name of the folder and click* ***Create new folder****, the folder will be created, and the candidate will be added there.*



Talent Network

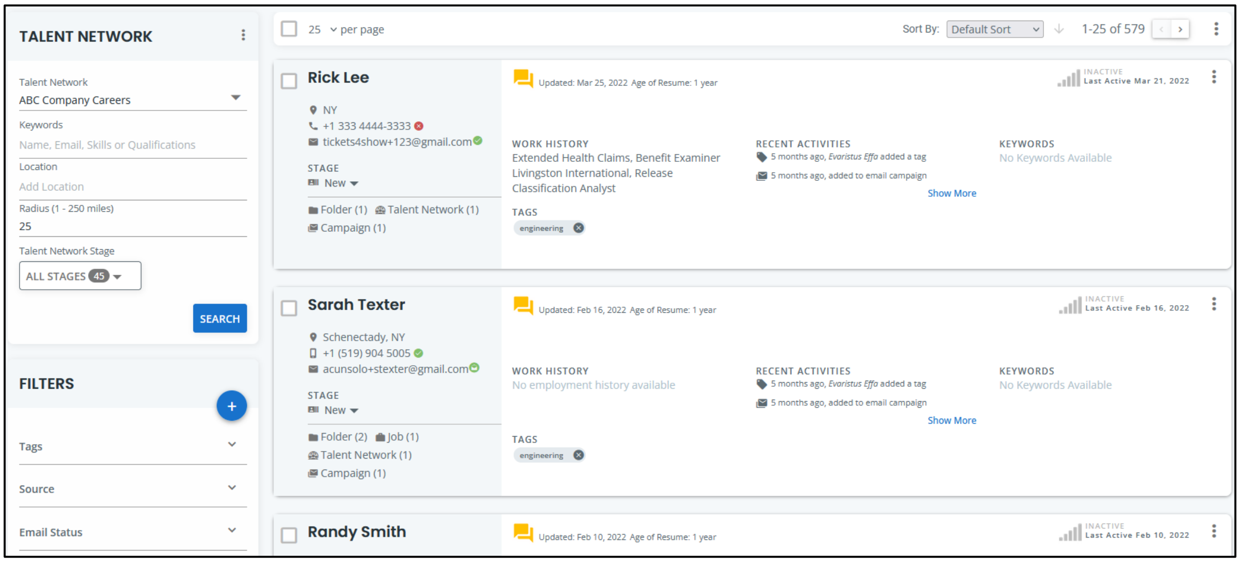
Evolve RM has a powerful feature to allow users to manage opt-in **Talent Networks**. These are candidates with the profile source called Talent Network who have voluntarily joined to learn more about future opportunities with your company. After a candidate joins your Talent Network, they are searchable in Source, or can be easily found and reviewed in the Talent Network module.



View Candidates on a Talent Network

All Talent Networks are shown by default, so you can see all candidates who have joined your Talent Networks. Once a career site with Talent Network is created for the company, the corresponding Talent Network Folder is created in the Talent Network module. The candidates who join a specific Talent Network can be viewed in that Talent Network or the **All Talent Network** default list.

You can filter the candidates within a Talent Network using a standard set of Source/CRM filters, or search for a specific candidate by their name, email, keyword, or location.



Talent Network Stages

CRM workflow stages can be configured in Talent Networks. Customers are encouraged to work with Evolve RM to set up CRM Stages.

NOTE: CRM Stages are not available in the All Talent Network list.

Auto-Email from Talent Network

You can set up an auto-email on a Talent Network to be sent out when a candidate joins it from a career site. If your company is using CRM Stages in Talent Networks, you can set up individual auto-emails on different stages in a Talent Network.

Work with Candidates in a Talent Network

You can work with your candidates in Talent Network the same way as you would work with them from your Search Results screen: view their profile, tag them, send them emails, add them to Jobs and Folders, or upload them into your ATS database.

NOTE: Talent Networks can use CRM stages. CRM Stages are not available on the ***All Talent Networks*** *list.*

Import

The **Import** Talent list contains candidates imported into Evolve RM by any CRM user. The import action allows a recruiter to import candidates they have collected outside of the system into Evolve RM. This makes those candidates searchable and actionable in RM.

The main use cases for importing candidates into RM include:

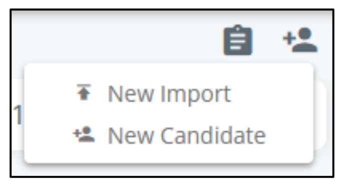
- Resumes collected from a career fair (either a list of candidates in a CSV form or resumes that you add to a zipped file).
- A resume was given to them by a referring employee.
- A resume received via email or from another source.
- Candidates from another system that is not integrated with RM, perhaps a legacy ATS or CRM.
- Candidates sourced on the open web.

Importing allows you to create single candidates by uploading their resume or entering their information manually, or multiple candidates from a CSV or a zipped file with resumes.

- Supported resume file formats include .doc, .docx, .pdf, .txt, .rft. or .html
- An imported file cannot exceed 20 MB
- CSV file should not have more than 50 thousand records

All imported resumes are added to the My Imports list linked to your user account. Multiple resumes are imported together to create a separate imported list (attached to your user account).

The Import function is available through the action menu in Import or can be located in Talent above any candidates list.



Import Stages

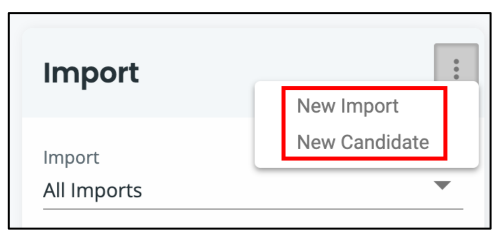
CRM workflow stages can be configured in Import. Customers are encouraged to work with Evolve RM to set up CRM stages.

NOTE: CRM Stages are not available on the All Imports list.

Import a Candidate

Click the Import action menu, then select either:

- **New Import** – To add multiple candidates, or
- **New Candidate** – To add a single candidate



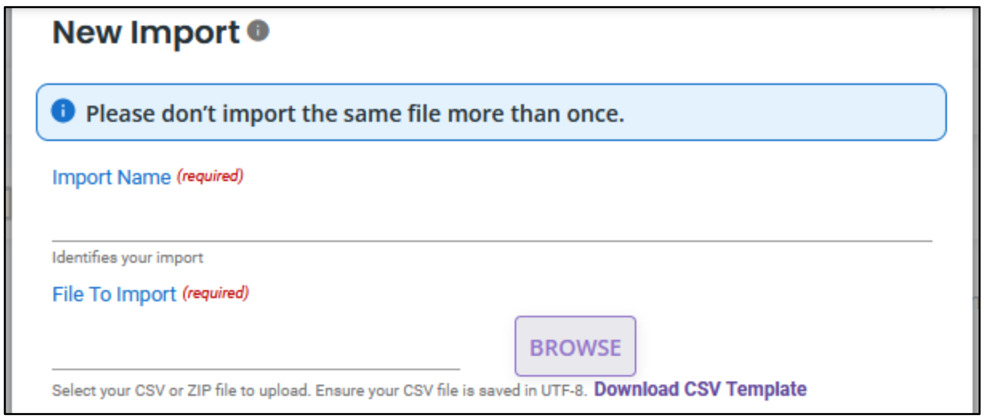
NOTE: Evolve RM has a standard CSV Template you can use to successfully import candidates. You can download the template from the New Import dialog. For the best results, have a CSV file limited to 50 thousand records. If using a ZIP file, the format of resumes should be .doc, .docx, .pdf, .txt, .rft, or .html. PDF files must be text-based. An imported file cannot exceed 20MB.

New Import

To import a CSV or a zipped file with multiple resumes, select **New Import**.

- **Import Name** - Enter the name of the import to identify it on the Imports list
- **File to Import** - Select your CSV or ZIP file to upload. Ensure your CSV file is saved in UTF-8. *NOTE: You can click Download CSV Template to use the provided template.*
- Optionally, you can add imported candidates to Folder(s) or Job(s), add Tags and Notes to them, or, with the user privileges, assign them to Audience Types or Lifecycle State
- Select a resume source that will be assigned to the imported candidates.

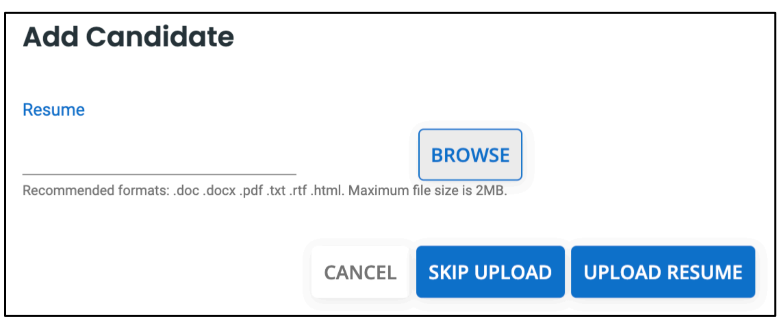
  NOTE: The candidate's source cannot be changed once the candidate has been created in CRM.

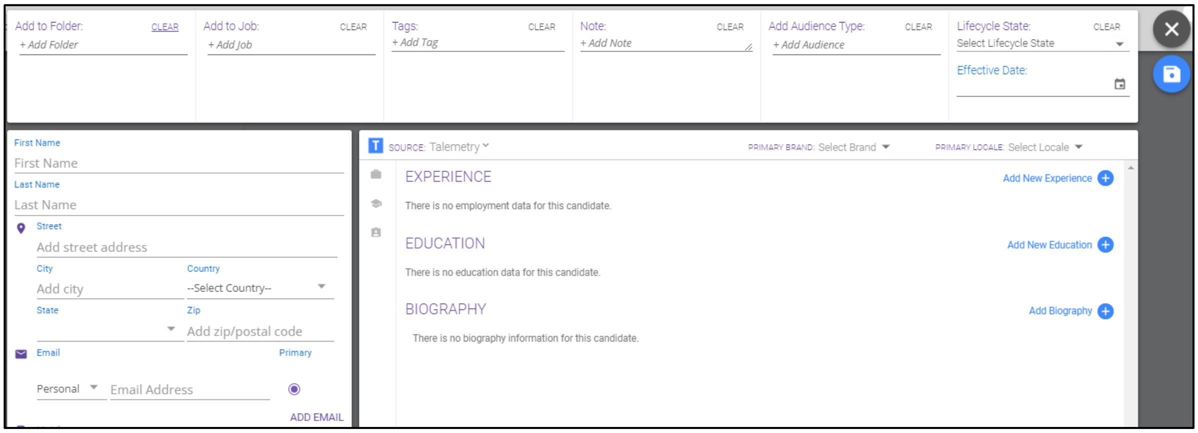


Click **Finish**.

New Candidate

Upload the candidate's resume, then click **UPLOAD RESUME**. Or you can create a candidate by selecting **SKIP UPLOAD**. A blank profile will display, and you can add the candidate information manually.





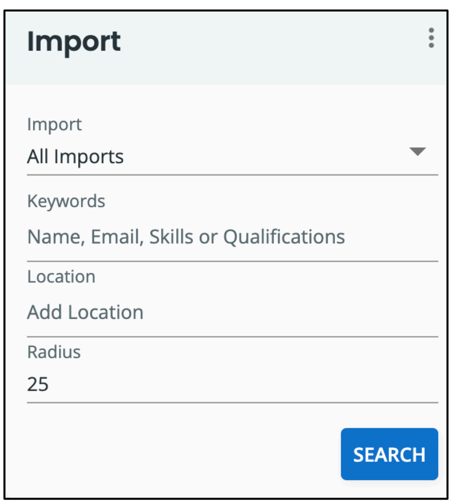
You can review and edit the details extracted from the uploaded resume or fill in the details manually. During the import, you can add the candidate to one or multiple Folders and Jobs, add Notes and Tags, or (with the user privilege) assign them Audience Type(s) and a Lifecycle State. You can also assign the candidate's source during the import.

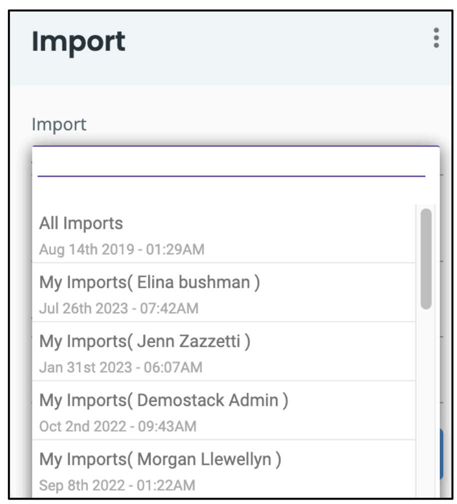
NOTE: The candidate's source cannot be changed once the candidate has been created in CRM.

View Imported Candidates

Candidates imported into Evolve RM, are searchable by all users. The exception to this is if the company has restricted access to certain Audience Types or Lifecycle States for a specific group of users.

When you navigate to the Import module, the *All Imports* folder will be shown by default. You can open a specific folder by selecting the Import dropdown and searching for the desired import.





You can work with your candidates in Imports the same way you would work with them from your search results page: view their profile, send emails or texts, assign Notes and Tags, and add them to other Jobs or Folders.

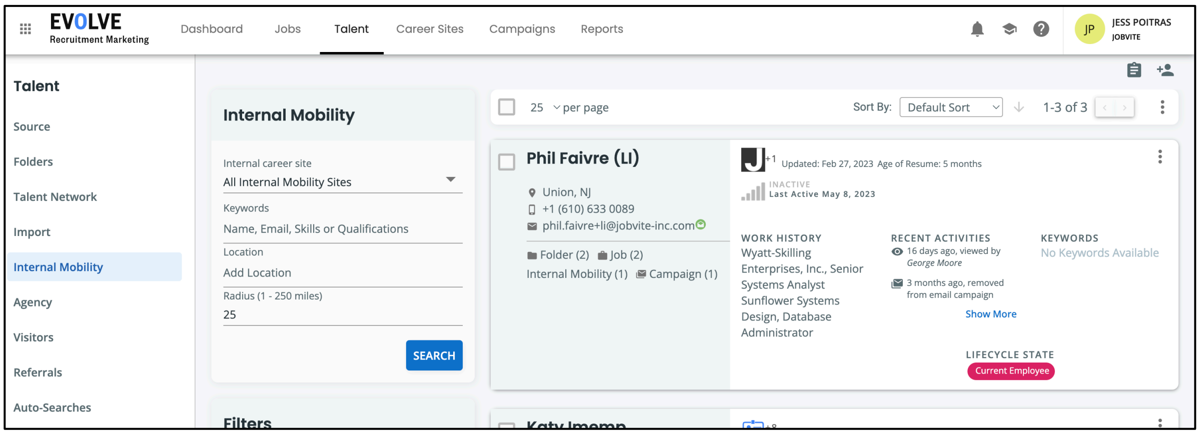
As with your search results screen, you can perform actions on either single or multiple candidate records in Import.

EVOLVE
Recruitment Marketing

Internal Mobility

Internal Mobility is the place where recruiters can see all internal employees who completed the Talent Assessment survey. After an employee completes the survey, their Internal Mobility profile is created in Evolve RM. The profiles can be found and reviewed in the Internal Mobility lists.

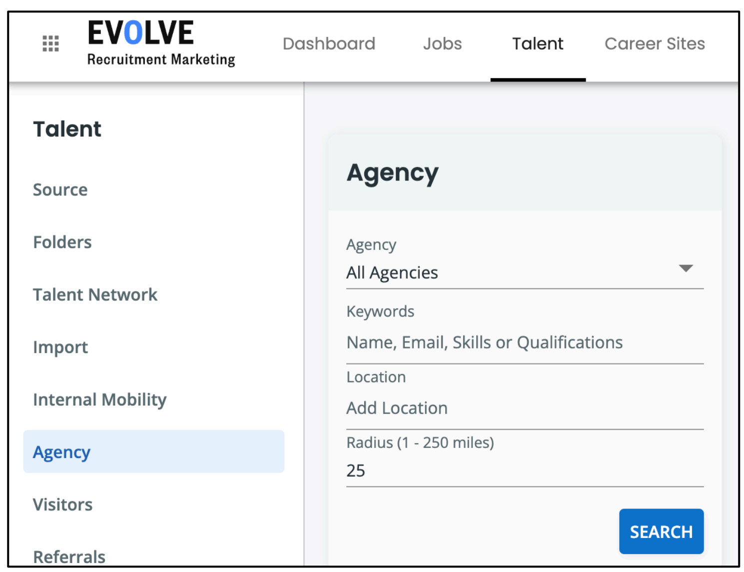
Internal Mobility has the same structure as any other Talent module: recruiters can filter Internal Mobility candidates, view their summary on the results list, open their profile, and perform actions on single, selected, or all candidates.



NOTE: Access to the Internal Mobility lists and candidates is restricted to users with the privilege in Internal Mobility.

Agency

Companies that work with external recruiting agencies have the **Agency** talent list available to users with the privilege. The Agency has the candidates submitted by agencies. Recruiters with the enabled privilege to work with Agency candidates Accept or Reject a candidate. The accepted Agency candidates are available in Source and searchable by all users. Rejected Agency candidates are only available in the Agency and the Job where they were submitted. The Agency is notified when their submitted candidate is accepted or rejected. In addition, companies can configure to notify the Agency when a recruiter sends an email to their candidate.



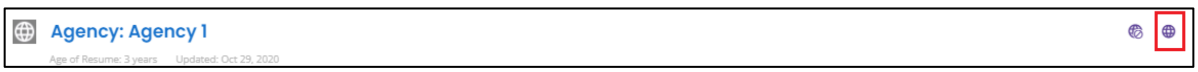
Once the candidate is accepted by the company and is accessible in any other talent list, any user can work with that candidate the same as with any other candidate in CRM: email them, add them to Folders, and assign Notes and Tags. Since the Agency list has agency candidates who have either not been reviewed yet or are rejected, the list of actions available to users in Agency lists is limited.

Accept / Reject Agency Candidate

To accept or reject a candidate submitted by an agency, open that candidate on the list of that Agency which submitted the candidate in the Job where they were submitted. Open the Profiles tab and locate two icons on the right side of the tab.

Accept Candidate

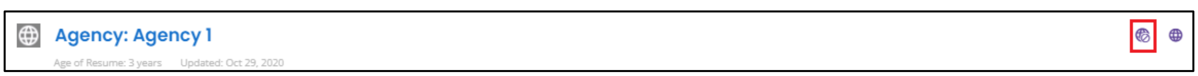
To accept the candidate, click **Accept**.



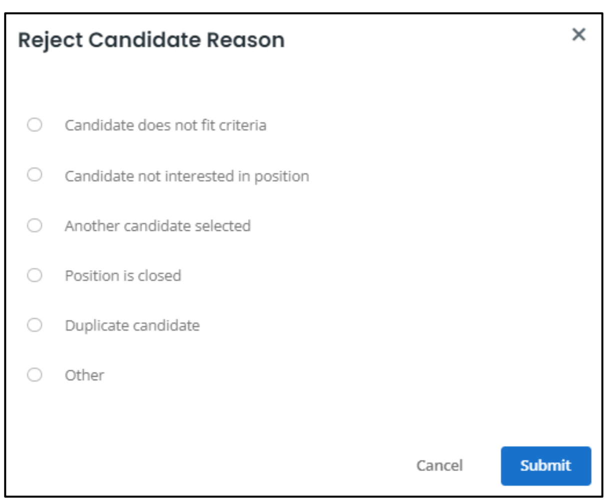
No other actions are required, the candidate has been accepted. The source icon will show as a green checkmark and the summary will have the *Accepted* indicator.

Reject Candidate

To reject the candidate, click **Reject**.



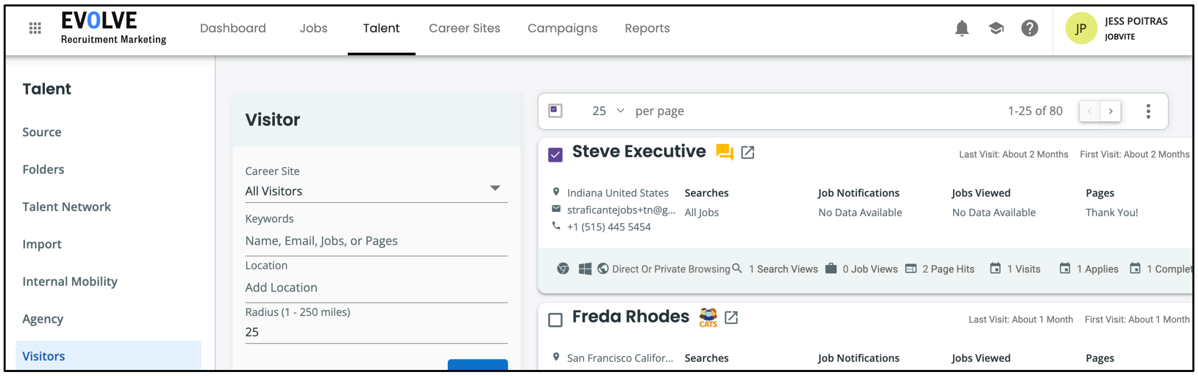
Select the reason from the list and click **Submit**.



The candidate will get the Agency Rejected source and the summary will have the *Rejected* indicator.

Visitors

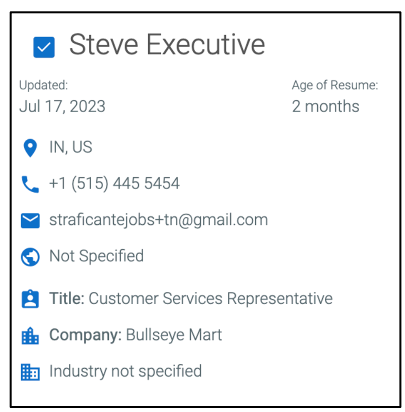
The **Visitors** module is a place where recruiters can see information about visitors on their career sites.



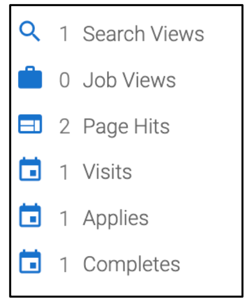
Visitor Profile

Once you open a visitor profile, you will see four sections:

- **Candidate Contact Card** – Shows the contact information and Candidate summary information.
  - If the visitor is anonymous (e.g. has only created a job notification), they can see:
    - Location (based on IP address), including City, State/Province, Country
    - Email Address – from the creation of job notification
    - First Visit
    - Last Visit
  - If the visitor is linked to a candidate, the user can see:
    - Name of Candidate
    - Last Updated
    - Age of resume
    - Location (from candidate profile), including City, State/Province, Country
    - Email Address
    - Phone Number
    - Profile URL (if known)
    - Most recent title
    - Most recent company
    - Industry of most recent company (if known)



- **Visitor Summary** – Shows a summary of the visitor's activities on your Career Sites across all their visits and visitor records, including:

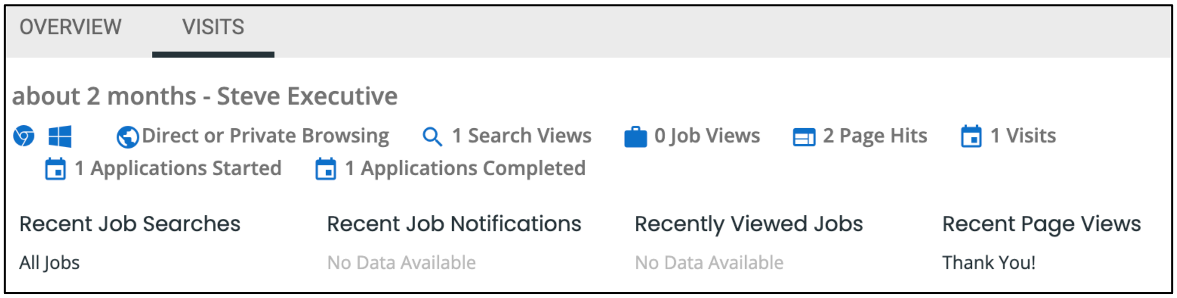


  - Search Views - The total number of times searches were run during all visits. This includes any search and repeated searches.
  - Jobs Views - The total number of times jobs were viewed during all visits. This includes repeated job views.
  - Page Hits - The total number of times that any page (including a job, static pages, search, or other URL on the career site) was viewed by all the visitors. This includes repeated page views.
  - Visits - The total number of visits.
  - Applies - The total number of job applications that were started during all visits.
  - Completes - The total number of job applications that were completed during all visits.
- **Visits Tab** – Shows more details about a visitor's activities on your Career Sites, including:
  - Header Bar - Shows how long the visitor was on the site, and the name of the visitor (No Name if unidentified). Click to expand/collapse the visitor details.
  - Browser Icon - This shows the browser that the visitor used. Hover to see the details, which include Browser and Version.
  - Operating System Icon - This shows the operating system that the visitor used. Hover to see the details, which include Operating System, Version, and Device Type.
  - Source - Shows the referral source (also known as the BID source) of the visitor.
  - Search Views - The total number of times searches were run by the visitor in the session. This includes any search including repeated searches.
  - Jobs Views - The total number of times jobs were viewed by the visitor in the session. This includes repeated job views.
  - Page Hits - The total number of times that any page (including a job, static pages, search, or other URL on the career site) was viewed by the visitor in the session. This includes repeated page views.
  - Visits - The total number of visits by the visitor in all visitor sessions. This includes when a visitor has a gap of longer than an hour in between actions.
  - Applications Started - The total number of job applications that were started.
  - Applications Completed - The total number of job applications that were completed.

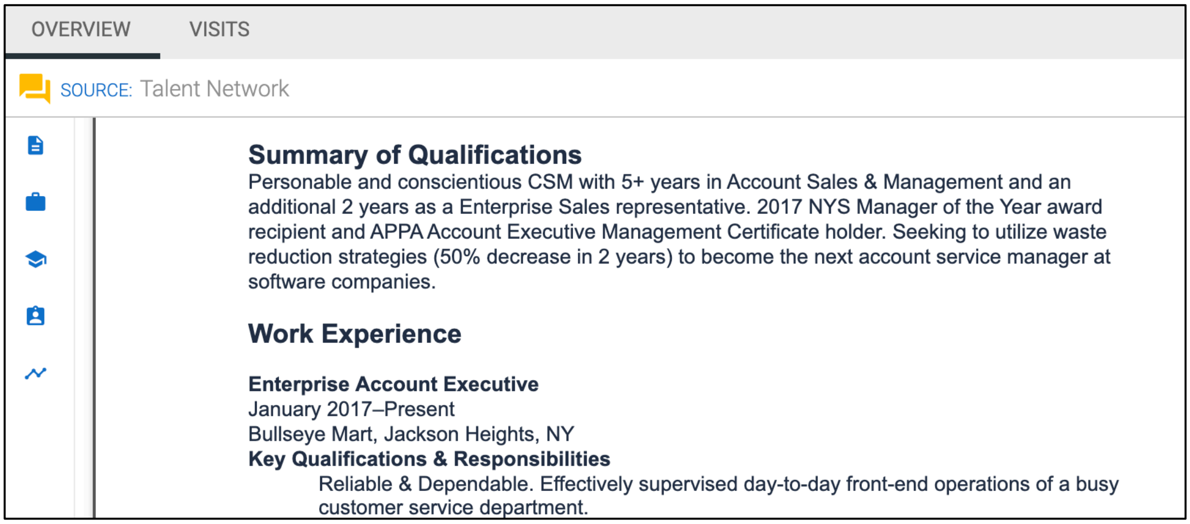
    NOTE: if the user has more than one visitor record (i.e. different sessions/cookies) then there will be more than one list of Visitor details.
  - Recent Job Searches - This is a list (up to 10) of the most recent unique searches performed by the visitor.
  - Recent Job Notifications - This is a list (up to 10) of the most recent active job notifications that were requested by the visitor.

- Recent Viewed Jobs - This is a list (up to 10) of the most recent unique jobs viewed by the visitor.
- Recent Page Views - This is a list (up to 10) of the most recent unique pages viewed by the visitor.

  NOTE: The landing page is not counted, searches and job pages are excluded from this list.

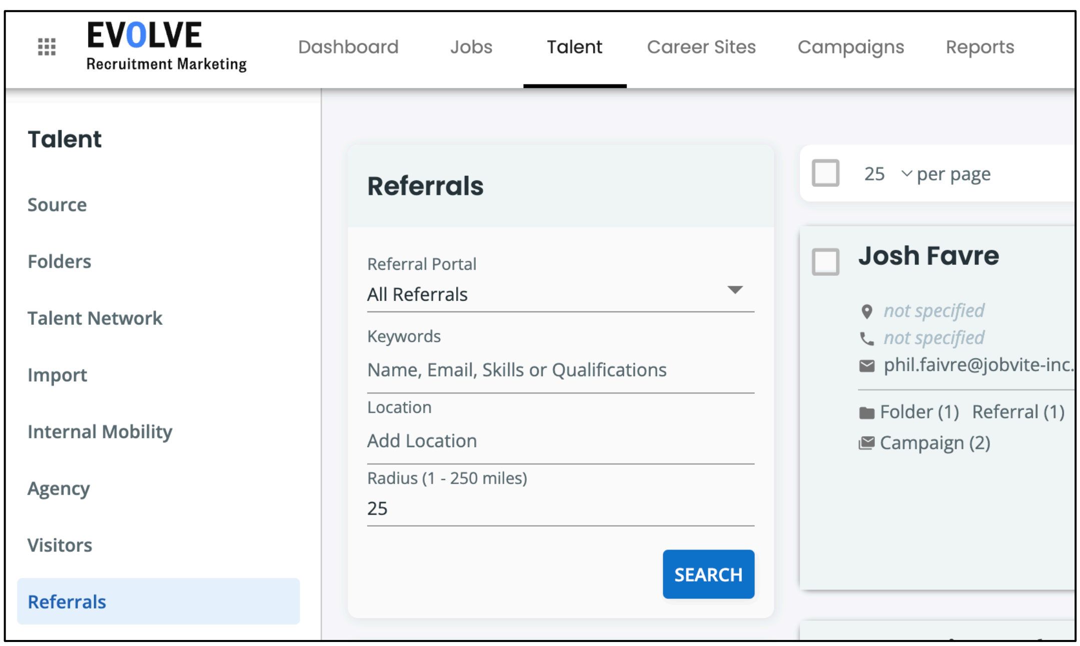


- **Overview Tab** – Shows the profile information of the candidate's default profile if the visitor is a known candidate.
  - Navigation area - Shows the Primary profile source icon and Source Name, Work History, Education History, Biography, and Timeline quick links.
    - Clicking on any of the quick links will scroll you to that section in the Profile.
  - Work History Section - The user can see each of the work history records on the candidate's primary profile, including:
    - Company Name
    - Location
    - Date Range
    - Job Title
    - Years of Experience
    - Job Description text
  - Education History Section - The user can see each of the education history records on the candidate's primary profile, including:
    - School
    - Location
    - Date Range
    - Degree
    - Major
  - Biography Section - The user can see the Summary and the Objective of the candidate's primary profile.
  - Timeline Section - This shows a visualization of the candidate's work history and education history on a vertical timeline.



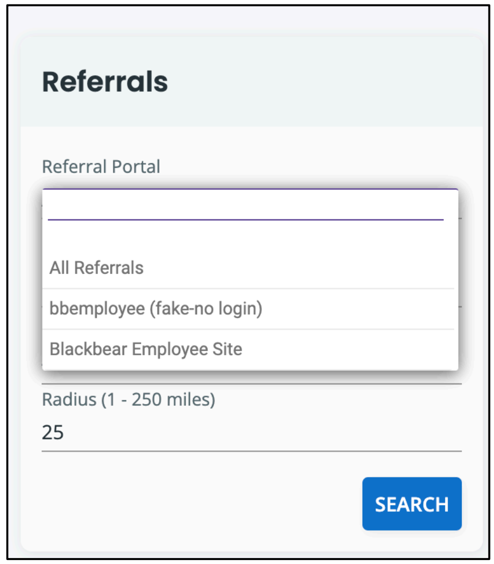
Referrals

The Referrals module is the place where recruiters can see all referrals made for the company. When an employee makes a referral through an internal Employee Referral career site, or a candidate uses a social referral link to apply for a job, a profile with the source *Referral* is created in Evolve RM. Referral profiles can be found in **Referrals**, in the Job Candidates list of the job they were referred to, and in Source, and are accessible by all users with the privilege in Referrals.



Search Referrals

In the Referrals module, all Referral profiles are available on the default All Referrals list. The default view can be filtered by the internal career site where the Employee Referral workflow was used. All internal career sites existing in the company will show in the Referrals Portal dropdown. Users can select a career site to view referrals made through that site.

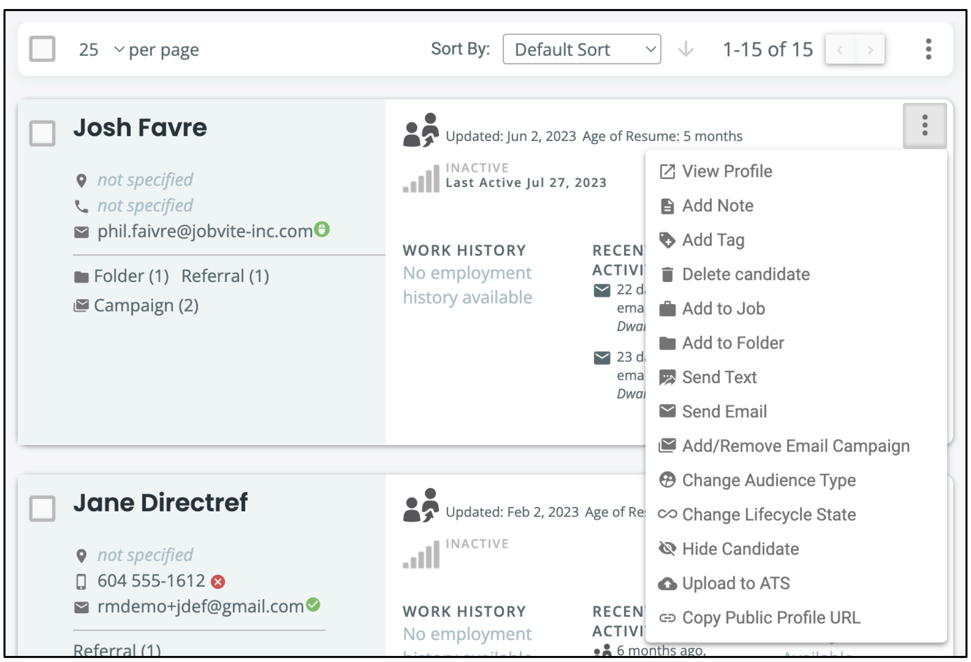


The application has the same structure as any other Talent module: recruiters can filter their Referral candidates, sort them by several criteria, view their summary on the results list, open their profile, and perform a full set of actions on single, select, or all candidates.

The Filters panel provides a standard list of filters in RM.

Working with Candidates in Referrals

You can work with your Referral candidates the same way as you would work with any other candidates on your search results page: view their profile, tag them, send them emails or text messages, assign Audience types and Lifecycle states, or add them to Jobs and Folders. You can perform actions on single or multiple candidate records. To perform tasks on a single candidate's record, click the action menu on the candidate search page or open the candidate's profile and use the action menu on the profile. To perform tasks on multiple candidates, select the checkboxes in the required candidates' summaries and use the page action menu above the list of candidates.



Auto-Search

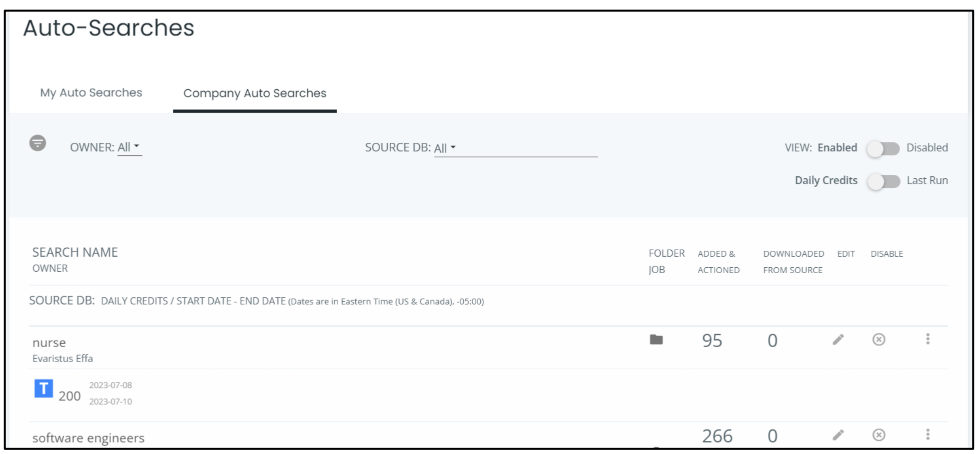
Source/CRM provides recruiters and sourcers with the ability to create **Auto-Searches** that will automatically download candidates from selected Job Boards and add them to a Job or Folder overnight. Users can set the daily resume credit limit per Job Board to be used by each auto-search against new, matching resumes. Found candidates can also be tagged, added to one or multiple Audience Types, assigned to a Lifecycle State, or added a Note.

Users can manage Auto-Searches by prioritizing which searches will run first, getting notifications for search performance, as well as seeing the history of auto-search. This tracking visibility allows users to quickly evaluate the effectiveness of their auto-search and monitor the usage of their credits on the resume databases.

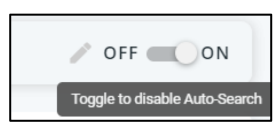
Examples:

- **Building Talent Pipelines** – Build Talent Pipelines by retrieving new candidates – add to Folder.
- **Actively recruiting for open jobs** – Automatically find matching candidates – auto-email invite to apply.
- **Optimize Resume/CV Database Spend** – Auto download targeted profiles from online databases.
- **Re-engage the existing database of past applicants** – Invite them to join Talent Network.
- **Request Profile Updates** – Email based on aged profiles.
- **Automated Tagging/Audience/Lifecycle States/Notes** – Find talent with specific attributes and organize with labels.

The Auto-Searches menu option allows you to see a list of your searches, target Folder/Job, and Job Boards (credits, start and end dates). You can also access search history, edit existing searches, and navigate to a Search/Folder/Job.



A search can easily be disabled from the Auto-Searches tab or by toggling off the auto-search context bar from the corresponding saved search or target folder.



Auto-Search Configuration

Customers are encouraged to work with Evolve RM to turn on the functionality in Source/CRM and configure User privileges to authorize specific users with the ability to use Auto-Search.

Working with Auto-Search

Once the Auto-Search feature has been enabled, users with the privilege can establish automated sourcing using already existing searches or by creating and saving new searches. You will be able to choose a destination (a Folder and/or Job) where you want to add candidates found by auto-search, assign the candidates to a Lifecycle State and one or many Audience Types, and add a Note and Tags to them. As a best practice, we recommend that the search used as an Auto-Search has the Candidates in Folder filter configured to Exclude candidates in the Folder used by that Auto-Search. With this setup, the search will always show only those candidates who have not yet been processed by Auto-Search.

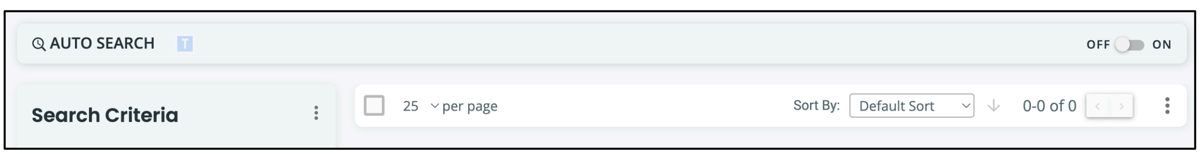
Users assigned with the Auto-Search privilege will see the Auto-Search context bar when they are working on Folders or Searches, and the Auto-Search menu option on a Search, Folder, and Job Candidates. The context bar displays the resume databases available to that user.

Create Auto-Search

When you create a new Auto-Search, Evolve RM will automatically download candidates from selected databases or your talent pool and add them to a Job or Folder overnight.

NOTE: When auto-search is configured against external sources, recruiters must set the daily credit limit to be used by each Auto-Search per board. Those credits are used against new, matching resumes daily. Company Administrators can create and assign Auto-Searches on behalf of other recruiters. These searches will access that user's job board licenses and use their credits.

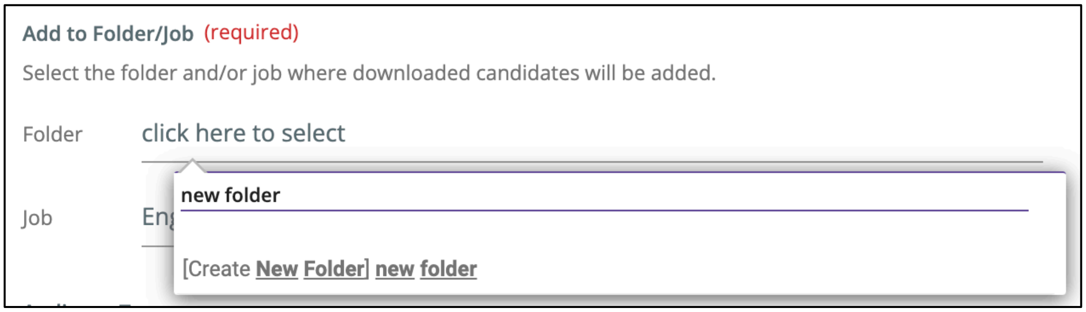
With a saved search, toggle-on **AUTO SEARCH**.



The Auto-Search pop-up will display. Select the following options in the **Add To** tab:

- **Folder** – Select a folder where your found candidates will be added. Start typing the folder name and select from the list of matching options.

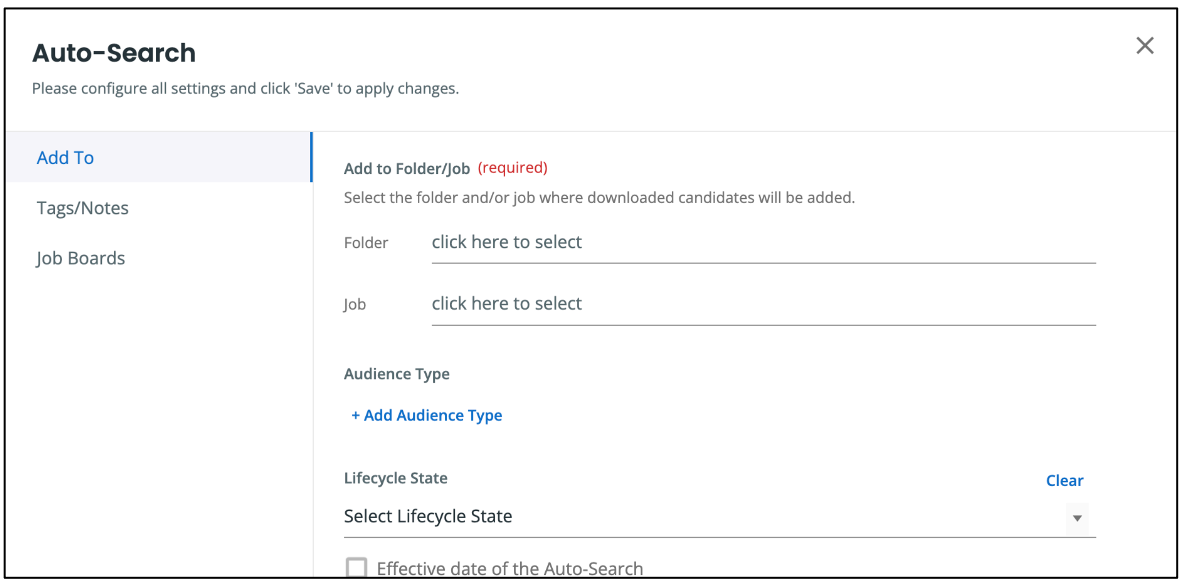
  NOTE: If no matching options are found, you can create the folder with the entered name right from the Auto Search setup wizard.



- **Job** – Select a job where your found candidates will be added. Start typing the job name or ID and select from the list of matching options.

  NOTE: If your user role does not have the Confidential Jobs privilege in Jobs, you will not be able to link auto-searches to jobs flagged as Confidential.

- Optionally, select **Audience** and **Lifecycle State** labels (user privilege required), and/or **Tags** and **Notes** to add to all candidates found by this Auto-Search.

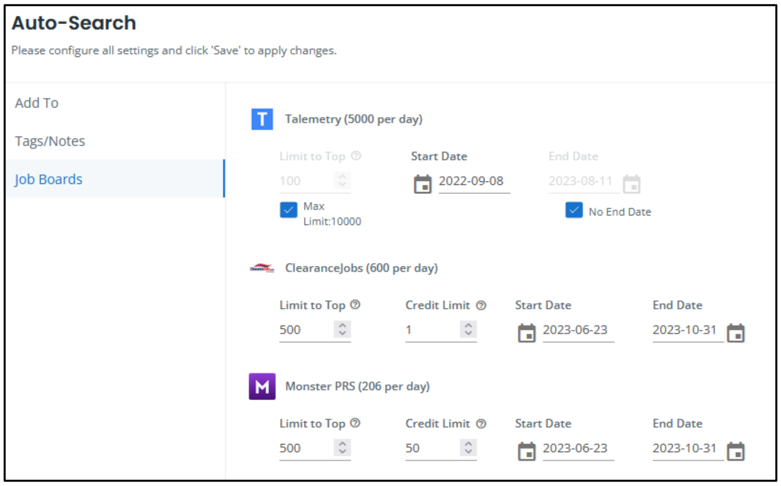


Click the **Job Boards** tab. Select the job boards where you want to look for candidates. Specify the following for each search target that you want to use on this Auto-Search:

- **Limit to Top** – This is how many candidates from the top-ranked you want to be screened each run.

  NOTE: If Auto-Search does not find new resumes within the specified limit, it will not expand the limit beyond the set number. Example: If Limit to Top is set to 50, then 50 candidates will be added to a Folder/Job during the Auto-Search run. On the next night, Auto-Search will scan the 50 top results again. If no new candidates are found in the top set of 50, then no other candidates will be actioned in that run. Auto-searches created against Evolve talent pool (without external job boards), can use the maximum limit of 10,000 candidates per auto-search run.

- **Start Date** and **End Date** – First and last day the Auto-Search should run.
- **Credit Limit** – For external Job Boards select the number of credits you want to use with each run of the Auto-Search. If no new candidates are found then no resumes will be downloaded and no credits will be used. The number of available credits is displayed in the brackets after the Job Board name; you cannot save a Credit Limit that is higher than the number of available credits.
- Auto-searches that are set up only against Evolve talent pool only can be configured to run four times a day (i.e. every six hours).

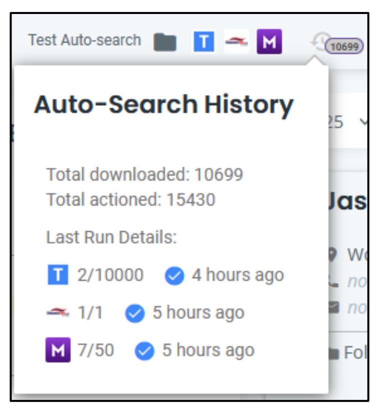


Auto-Search Indicators

When viewing a Job, Folder, or Saved search that has an auto-search attached, a context bar will be visible showing the name, folder and/or job linked to that auto-search (you can click the icon to navigate to that Folder or Job), Job Boards, and the number of credits used in the last run associated with that auto-search. Users can also edit the auto-search and adjust credits and the schedule.

Auto-Search History

The auto-search history can be viewed from the Auto-Search context bar or the Auto-Search screen → history icon.



From here, you can click to see:

- The total number of candidates downloaded from external boards since the beginning of the auto-search.
- Total candidates actioned since the beginning.
- Last run for each search target:
    - How long ago
    - Actual credit/max credits
    - Status

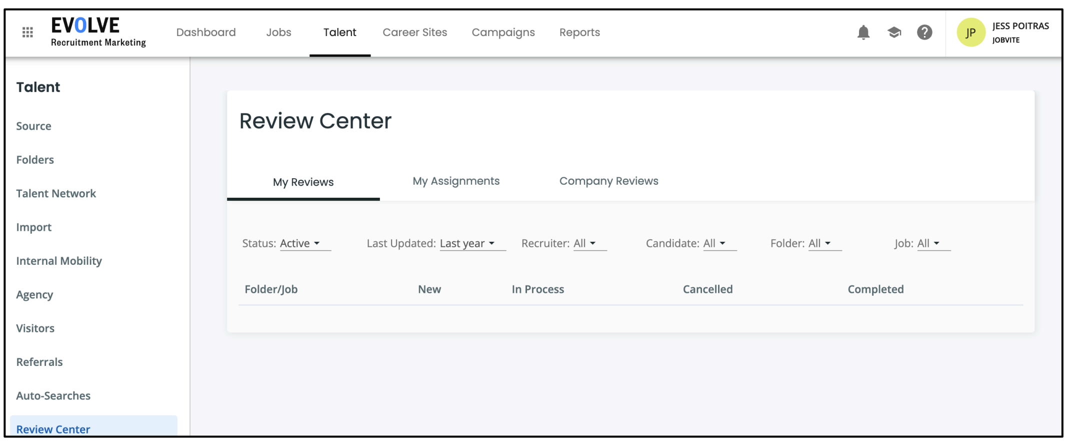
Review Center

Review Center Overview

As a part of the hiring process, recruiters and sources often need to get the opinion of hiring managers on the potential hires or review them for the potential match with the selected position. The Review Center is the place where all review requests are shown, and review feedback can be given. The Reviewer gets access to the Review Center where they can see the list of candidates sent to them for review, view the detailed profiles of those candidates, and provide their feedback by choosing a predefined statement or typing their comments. The Recruiter can access the Review Center to view the status of the reviews they asked for.

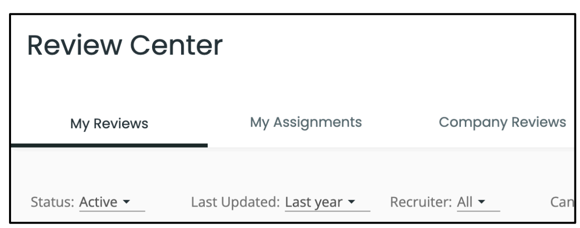
The main use cases for the Review Center are:

- Reviewers or Hiring Managers can see reviews assigned to them. For each candidate, feedback (standard or freeform) can be given.
- The recruiter can see reviews that they sent out for review and look at the feedback given. The recruiter can also provide freeform feedback to the Reviewer, and complete or cancel reviews.
- Company Admin can see all reviews sent out for review by all recruiters at the company.



Review Center Tabs

There are three tabs in the Review Center:



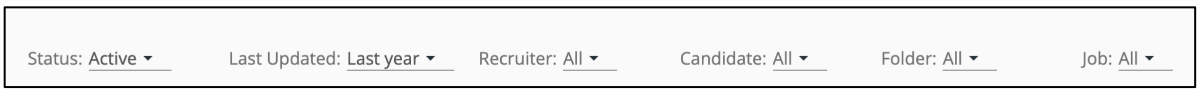
- **My Reviews** - This is visible to any user who has the Reviewer privilege. The Reviewer sees all candidates assigned to them for review.
- **My Assignments** - This is visible to any user who has the Reviewer Assignment privilege. The recruiter sees all candidates that they assigned for review.
- **Company Reviews** - This is visible to company admins and shows all review requests sent to all reviewers by all recruiters.

NOTE: The default view is all Active reviews (New or In Process) in the last year.

Review Center Filters

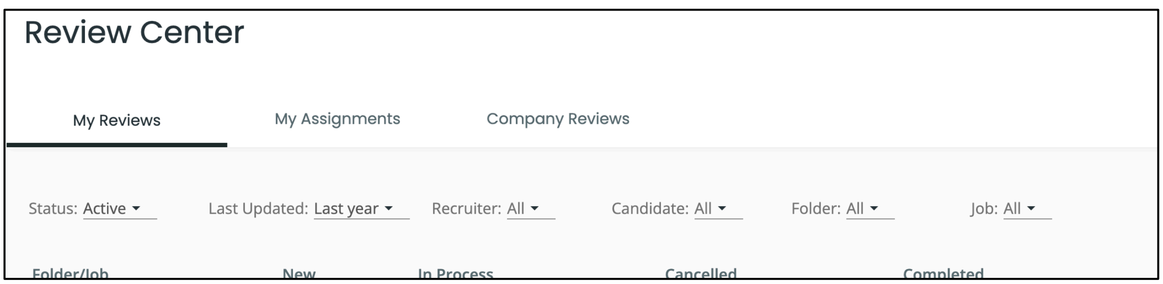
The following are the filters available:

- **Status** – Filter by the following: Active (New or In Process), New, In Process, Complete, or Cancelled.
- **Last Updated** – Date range of the latest review. The default is *Last Yea*r.
- **Recruiter** - Available in My Reviews or Company Reviews. This filter is the recruiter who assigned the candidates for review. The default is *All.*
- **Reviewer** - Available in My Assignments or Company Reviews to filter by the reviewer who received candidates for review. The default is *All.*
- **Candidate** – Find a specific candidate who was assigned for review. The default is *All*.
- **Folder** – Filter by a folder where candidates were assigned for review. The default is *All*.
- **Job** – Filter by a job where candidates were assigned for review. The default is *All*.



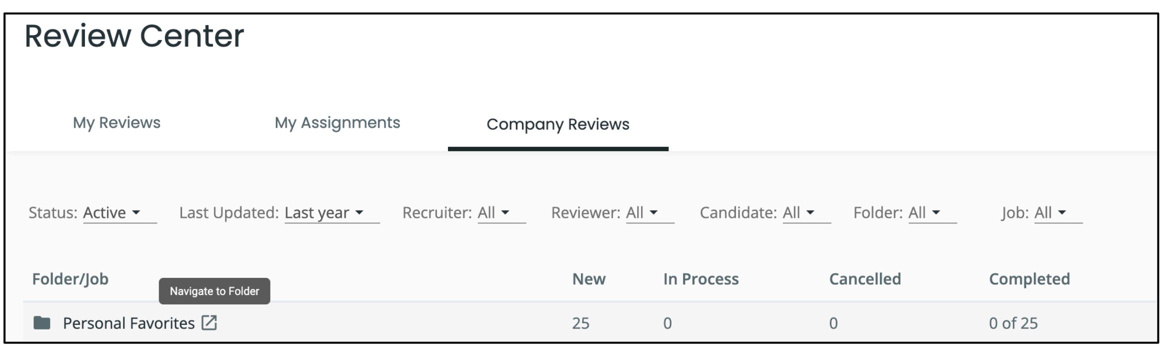
Review Center Candidates to Review

Candidates are grouped by the Folder or Job from which they were sent for review.



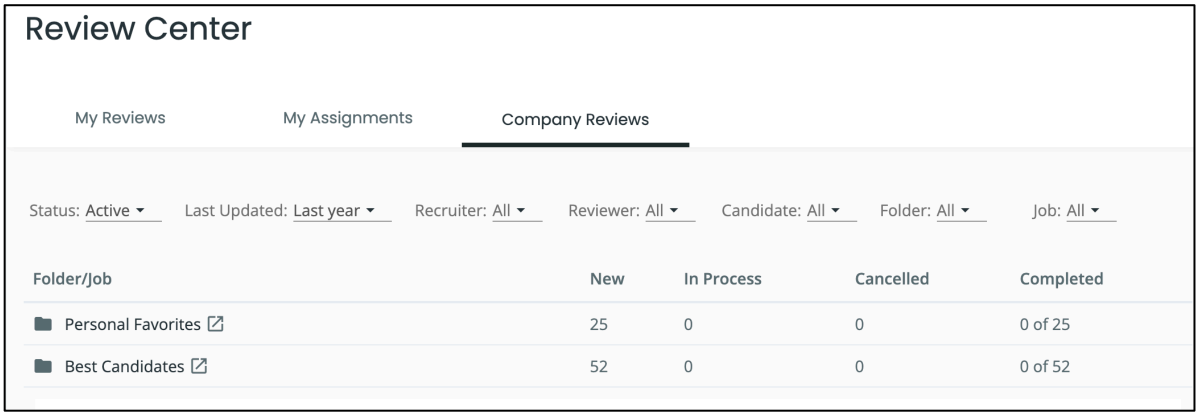
For each Folder or Job, you see a summary of the candidates in each status (New, In Process, Cancelled, or Completed).

On the My **Assignments** and **Company Reviews** tabs, there is a link to the Folder or Job where reviewers or recruiters can navigate and see all candidates.



*NOTE: Users without the **Confidential jobs** privilege in Jobs will not see the link to navigate to jobs flagged as **confidential**. They will only be able to view the candidates assigned to them for review from such jobs.*

Click anywhere on the Folder/Job grouping row to expand and see the candidates in that Folder/Job.



The user can see the following:

- **Selected box** - Select all candidates or select individual candidates. At the top see the number selected.
- **Selected Actions** - When one or more candidates are selected, the following actions are available:
    - Complete Selected - This allows users to complete all selected reviews.
    - Cancel Selected - This allows only the Recruiters or the Company Admins to cancel all selected reviews (for example, when the feedback is no longer required).
- **Status icon** - Indicates New, In Process, Complete, or Cancelled.
- **Name** - Name of the candidate.
- **Feedback** – This icon indicates freeform feedback, and the message indicates standard feedback. If this is disabled, then no feedback is given.
- **Freeform icon** - If it is dark, it means that freeform feedback was given to the candidate.
- **Standard Feedback** - If provided it is shown here.
- **Reviewer** - The name of the reviewer user who is assigned to review the candidate for review. Available in My Assignments and Company Assignments tabs.
- **Recruiter** - The name of the recruiter who assigned the candidate for review. Available in My Reviews or Company Assignments tabs.
- **Review Age** - How long ago the review was assigned.
- **Last Updated** - How long ago the review was updated (e.g. when feedback was given or the status was changed).
- **Cancel Action** - This allows a Recruiter or Company Admin to cancel a specific review if it is no longer needed.

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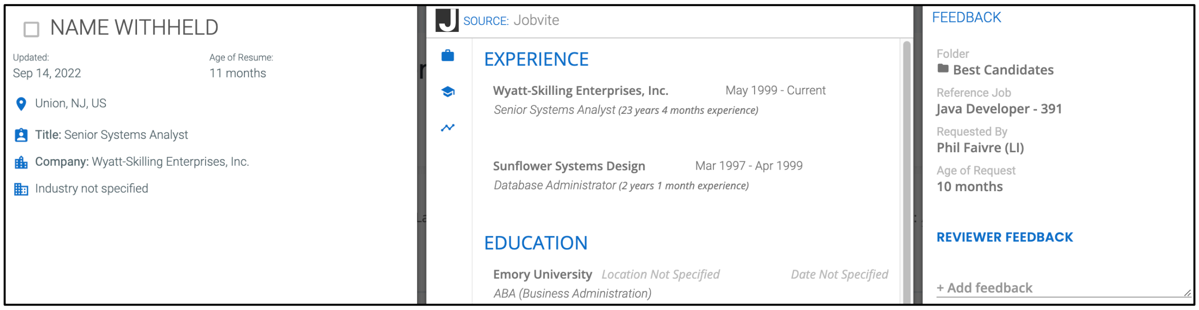
Candidate Review Profile

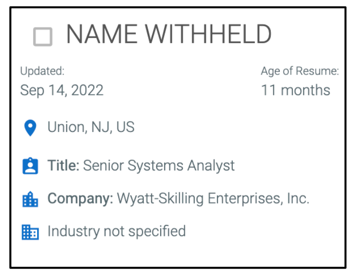
A user can click any candidate to see the Review Profile. They can navigate between *Review Profiles* in the Folder/Job.



The Review Profile has three sections:

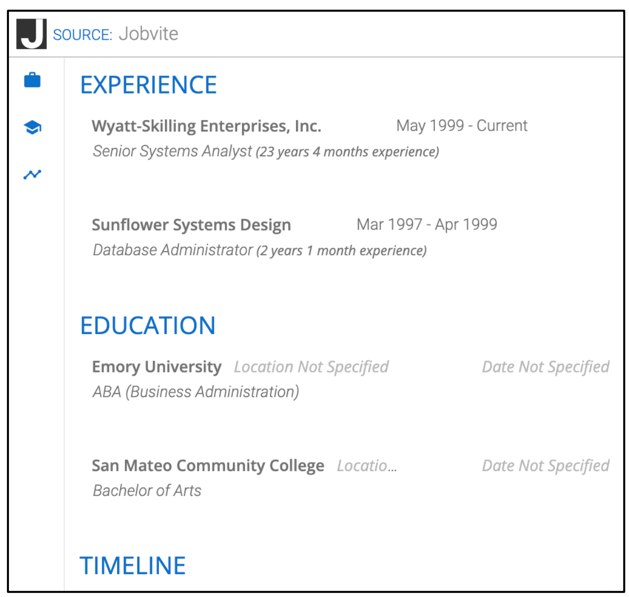
- **Candidate Contact Card** - Shows the contact information and Candidate summary information:
    - Name of Candidate, last updated, age of resume; Candidate's location, phone number (mobile or home), email address, URL; most recent title, most recent company, and industry

      NOTE: The First/Last Name, Email, Phone Number, and URL can all be turned off with a feature switch



- **Candidate Resume and Profile** - Shows the Primary profile source icon and Source Name, Resume text, Work History, Education History, Biography, and Timeline quick links:
    - Resume – Shows the inline view of the candidate's primary resume.

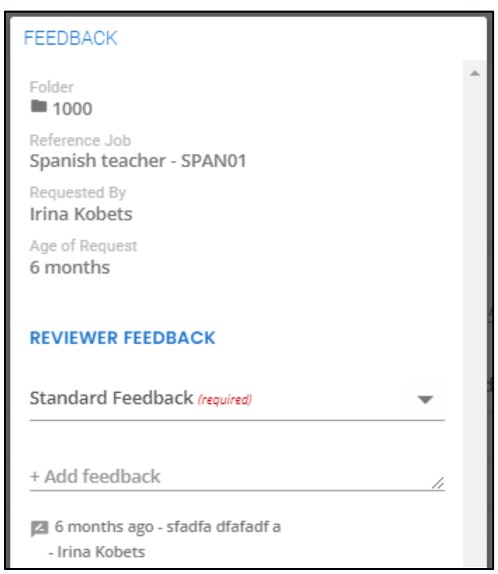
      NOTE: The resume can be turned off with a feature switch.
    - Work History – Shows the work history records on the candidate's primary profile, including:
        - Company Name
        - Location
        - Date Range
        - Job Title
        - Years of Experience
        - Job Description text
    - Education History – Shows the education history records on the candidate's primary profile, including:
        - School



        - Location
        - Date Range
        - Degree
        - Major
    - Biography – Shows the Summary and Objective of the candidate's primary profile

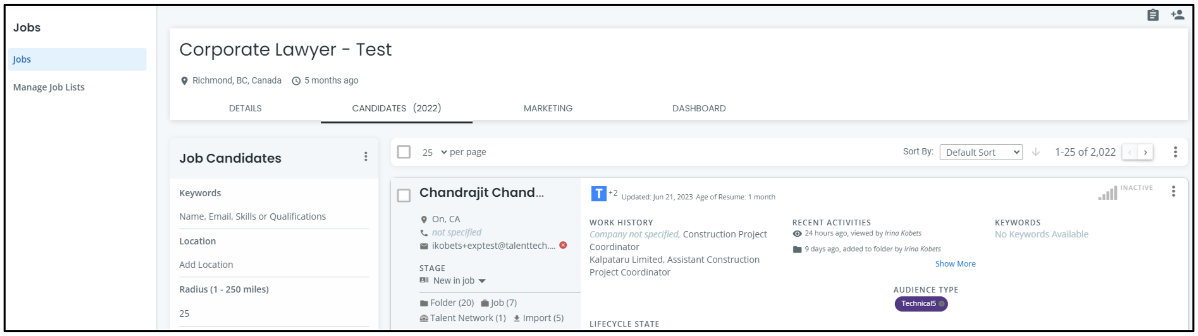
      NOTE: The Biography can be turned off with a feature switch.

    - Timeline - This shows a visualization of the user's work history and education history on a vertical timeline.
- **Review Card** - This is the information related to the Review request. This includes:
    - Folder or Job - The Folder or Job where the Review request was made.
    - Reference Job - The related job that was entered by the Recruiter who made the review request.
    - Requested By - The recruiter who requested the review.
    - Age of Request - How long ago the review request was made.
    - Reviewer Feedback – Here the reviewer can add their standard feedback, and any freeform feedback can be given by either the recruiter or reviewer. The feedback history is displayed in this section.
        - Standard Feedback - This is a drop-down for a Reviewer to choose a standard feedback response.
            - If the reviewer has given feedback already, the previous value chosen will be shown. Only the Reviewer can change it. Each choice that is made is entered into the Feedback History.
        - Freeform Feedback - This is the area where either a recruiter or reviewer can enter freeform feedback or notes about the review.
    - Complete Action - Once standard feedback has been given (at a minimum), the Complete action is available.



Jobs

Evolve RM allows users to manage lists of candidates associated with your ATS **Jobs**. This includes the candidates who applied in the ATS and were synced to the Job in Evolve RM in the Applied Status. This provides Recruiters with the management of Pre-Applicant (candidate) and ATS applicants for current, open positions.

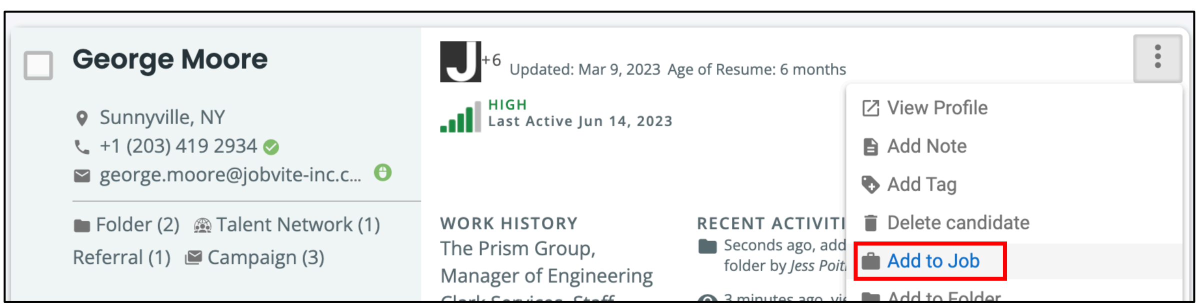


Job Stages

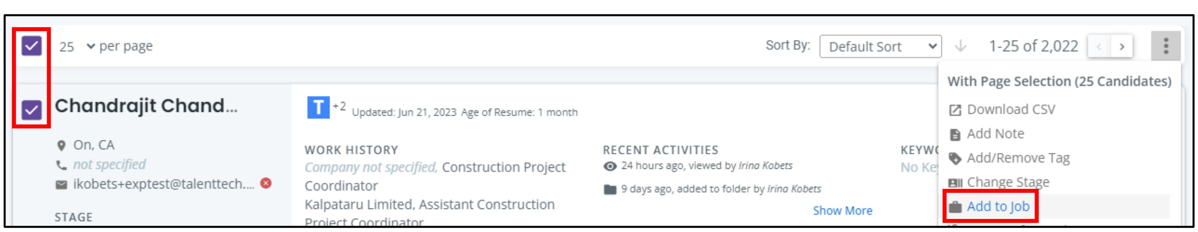
Candidates' lists in Jobs can have up to eight CRM workflow stages. Once configured for the company, CRM stages are available to all Source and CRM users. Customers are encouraged to work with Evolve RM to set up CRM Stages. Candidates can be added to a stage individually or in groups. The candidates who applied in the ATS, and are synced into RM, are automatically added to the Applied Stage (number 8).

Add Candidates to Jobs

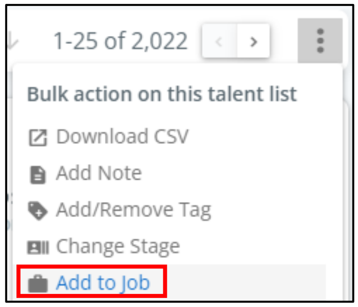
You can add your sourced candidates to a job and work with them through your job workflow stages. Use the **Add to Job** option in the action menu on a profile or candidate summary.



To add multiple candidates to a job, select candidates on the screen and use **Add to Job** on the screen action menu.

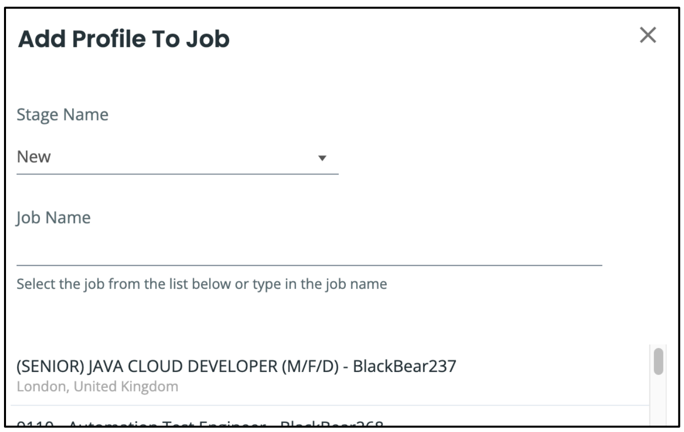


You can also add all candidates on your list to a job by using the bulk actions menu.



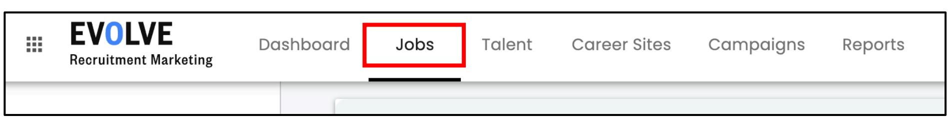
Complete the following in the **Add Profile to Job** pop-up:

- **Stage Name** – Optionally, select a CRM stage where you want to add the candidates.
- **Job Name** – Select the job from the list below or type in the job name.



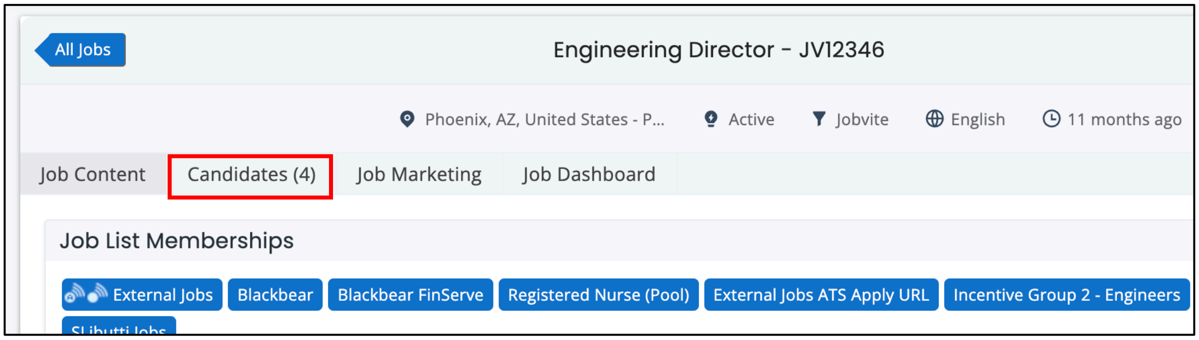
Remove Candidates from Job

Candidates can be removed from a specific job. Click the **Jobs** tab.



Search for the desired job in the Job List, then click the job name to open it.

Click the **Candidates** tab.



On the candidate's list, click the action menu for the candidate you want to remove, then click **Remove from Job**.

The Job candidate list will be updated.