

# **EVOLVE**

## **TALENT ACQUISITION SUITE**

### **Release Notes**

*August 2023*

# EVOLVE

Talent Acquisition Suite

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## Overview

### Release Date

The Evolve Applicant Tracking System (ATS) and Recruitment Marketing (RM) Releases are scheduled during the maintenance window on Wednesday, August 30<sup>th</sup>. There is no major downtime anticipated during the release process, but there may be minor interruptions to service as components of the system are upgraded across our server farms and hosting facilities.

### Release Impact

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

### Technical Requirements

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

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

## Recruiter Productivity Takes Center Stage

With this release, Evolve delivers significant functionality to support the productivity of your recruiting team. In the challenging recruiting environment we all face, Evolve is committed to providing tools and solutions to help teams effectively and efficiently source, attract and hire the best available talent.

## Disclaimer

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# ATS & Onboarding

## Bulk Onboarding

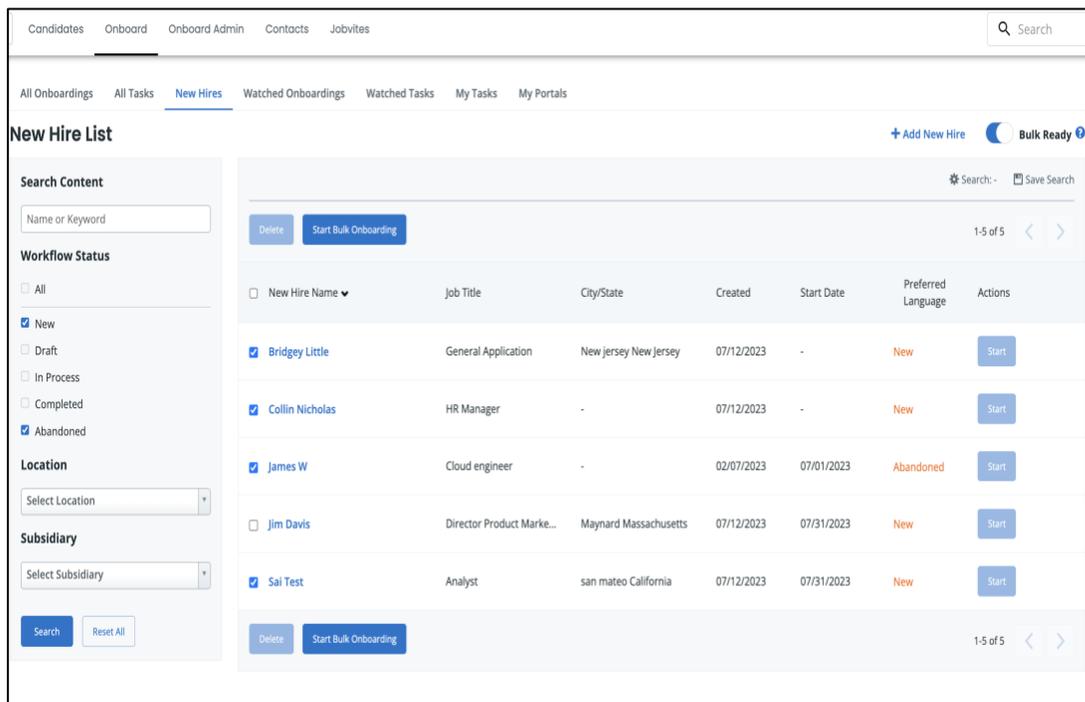
Previously, Onboarding Orchestrators were only able to start Onboarding activities for one New Hire at a time. This causes a bottleneck for companies that bulk hire candidates.

### What Changed

The Bulk Onboarding feature allows Onboard Orchestrators to onboard multiple new hires at once, saving time and eliminating manual processes, as opposed to enrolling each new hire individually.

### Features

- **Onboard Admins** now have the option to create Bulk Ready Task Templates, Task Group Templates, and Process Templates with the simple Bulk Ready switch. Bulk Ready Templates ensure that all required fields at the time of onboard kickoff are entered at the time of creation itself. This removes all the blockers at the final kick-off time and ensures smooth onboarding.
- **Onboard Orchestrators** have the option to filter the New Hire list by clicking **Bulk Ready** to display only *New* and *Abandoned* status'. Users can click on at least one record to enable the **Start Bulk Onboard**. From there, you can select multiple or all new hires. Select the **Bulk Ready** process template. Review the selected new hires in the Summary screen and kick off the final Onboarding process.



## Multi-lingual Ability for New Hires

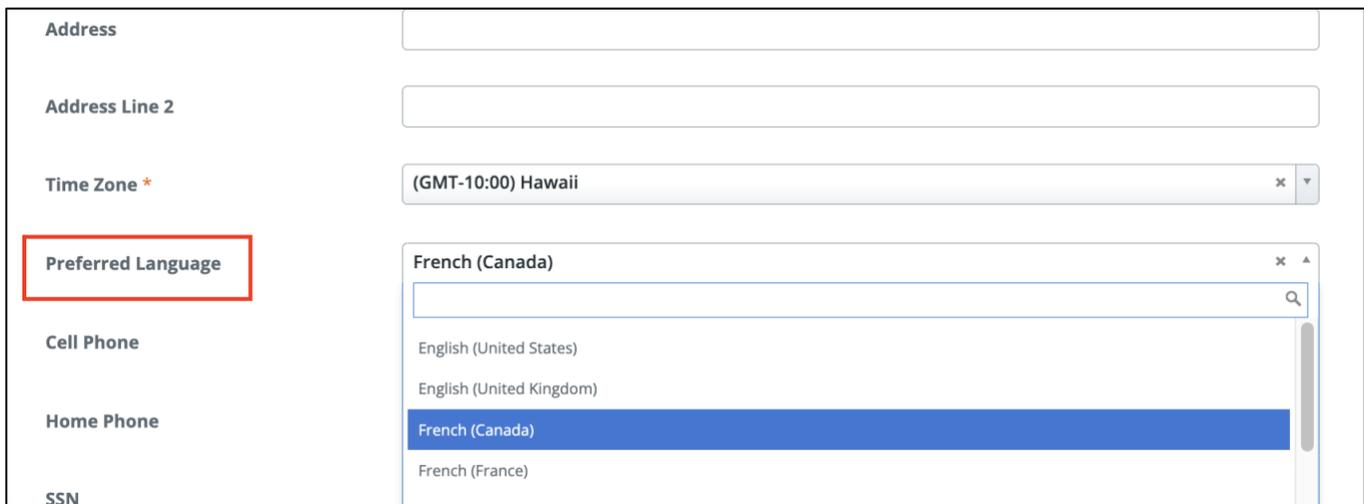
Previously, the only supported language in the New Hire portal was English. Organizations weren't able to communicate with candidates in their preferred language, which diminished the candidate's experience.

## What Changed

The New Hire experience has been improved by having the New Hire portal available in the candidate's preferred language. A new standard field, *Preferred Language*, has been added to the portal.

## Configuration

- The Preferred Language field mimics the language logic built in ATS.
  - First, refer to the value in the field *Language for Automated Emails* in the Requisition.
  - If nothing is selected, the system will default to the language associated with the location.
  - If no language is associated with the selected location then it will default to the company language configured in Admin.
- Orchestrators can also select any other language from the Preferred Language dropdown list.
  - The dropdown displays the list of all available languages configured at an organizational level.



The screenshot shows a configuration form with several fields: Address, Address Line 2, Time Zone (set to GMT-10:00 Hawaii), Preferred Language, Cell Phone, Home Phone, and SSN. The Preferred Language field is highlighted with a red box, and its dropdown menu is open, showing a list of languages: English (United States), English (United Kingdom), French (Canada) (highlighted in blue), and French (France). The dropdown menu also includes a search bar and a scroll bar.

## Recruitment Marketing

### Referrals in Recruitment Marketing Platform Improvements

#### Other Enhancements and Fixes

- (Fix) Referral Log – Reason was missing in the card view.
- (Fix) Referral Log – Description for **Reason Ineligibility** under *Referrals Log* and *Events Log* was displaying differently.
- (Fix) Referral Log – When the records are filtered with today's date, it also displayed some records from the previous day.
- (Fix) CRM Referrals Filter – The users dropdown now displays all the users in the account including employees.

## CRM Improvements

### Configure Filters

- Company Admins can configure default filters for Source.
  - Select filters that are default or optional for all users when they perform a new CRM search in Source.
  - When a user loads Source, they will see the configured default filters.

#### Configure Filters: Source

Add or remove filters from the lists below to configure CRM filters in Source

Source
Folders
Jobs
Agency
Talent Network
Import
Internal Mobility
Referrals

**Default Filter List**  
This list of filters will show by default under "Filters".

Available Filters

Select Add ↑

Age of Resume	×
Audience Type	×
Candidate Country	×
Date Profile Added	×
Email Address Match	×
Email Campaign	×
Email Required	×
Email Status	×
Engagement Level	×
Lifecycle State	×
Source	×
Tags	×

**Additional Filter List**  
This list of filters will be available under the + Button

Available Filters

No options Add ↑

Years Of Experience
12345678910111213141516171819202122232425
!HarmeetJobs
789
__DoubleUnd__
aaatest
ATS Job Application Date
Availibility Date
Brand
Candidate Consent
Candidates In Agency
Candidates In Folder
Candidates In Import

Q AUTO SEARCH

Search Criteria

Search Target

TALEMETRY FILTERS

Age of Resume

Audience Type

Candidate Country

Date Profile Added

Email Address Match

Email Campaign

Email Required

Email Status

Engagement Level

Lifecycle State

Source

Tags

CLEAR APPLY FILTERS

### CRM Filters and Search

- (Enhancement) Sort by First/Last name defaults to Ascending.
- (Fix) Consent Filter – Resolved behavior that was producing the wrong result when the *ALL* toggle and a *Missing* option were used together.

### Other Enhancements and Fixes

- (Enhancement) Career Sites – New Carer Sites have additional recommended header settings to improve default security.
- (Enhancement) Career Site – Changed the aspect ratio for thumbnail photos in Content Pages to be auto-width.
- (Fix) Candidate Portal – Allowed authentication link to be active for up to 15 minutes (to prevent preview click from mail client invalidating the URL).
- (Fix) Candidate Portal – SMS Consent – Resolved the issue with the intermittent County Code dropdown being empty and unable to save a new phone number.
- (Fix) When a new Account was configured, implementation could not configure brand translations for the Candidate Portal.

## Integrations

### Recruitment Marketing Job Board Integrations

#### New Job Board Integrations

- Per Post/Selective Broadcast
  - Idealist

#### Other Enhancements and Defect Fixes

- (Enhancement) ZipRecruiter – Support is now available for adding Custom Fields on a per-customer basis to the feed.

### Recruitment Marketing Integrations

#### Enhancements and Defect Fixes

- (Fix) Infor Candidate Export – Added a fix to resolve the candidate push when the candidate address had “&” in the address line.
- (Enhancement) CSV Employee Export – Respect active flag added to CSV file.
- (Enhancement) PSFT Position Sync – Added an option to run Agent in full sync from a specific date range.
- (Fix) CSV Candidate Export – Send candidate source specified in Agent when source values were not mapped to CSV field.
- (Enhancement) Jobvite Candidate Import – Send the candidate’s employee ID along with the candidate source to Evolve ATS for internal candidates.

### Evolve ATS Integrations

*No new integrations happened in August.*

### Evolve ATS Partner Integrations

#### WOTC.com

- New ATS-based integrations have been set up in place of the prior Onboarding-based integration.
  - Candidates can be sent to WOTC for the pre-interview or at the final Onboarding workflow state.
  - Customers with the existing Onboarding-based integration will not have to migrate, but we will not set up any more integrations out of Onboarding.

## Analytics

### Other Enhancements, Fixes, and Updates

#### Enhancements and Fixes

- (Enhancement) *The Interview* stage has been changed to *In Process* in the ZCIS Performance report. This has been changed to reflect the *In Process* stage in RM.