

EVOLVE

TALENT ACQUISITION SUITE

Release Notes

Q2 2023



Talent Acquisition Suite

Table of Contents

| | |
|--|-----------|
| Overview | 3 |
| Release Impact | 3 |
| Technical Requirements | 3 |
| Recruiter Productivity Takes Center Stage | 3 |
| Disclaimer | 3 |
| ATS and Onboarding | 4 |
| Portuguese (Brazil) Language Support | 4 |
| Salary Transparency Support | 4 |
| SMS Consent | 4 |
| OFCCP – Voluntary Self Identification Form Update | 5 |
| Recruitment Marketing | 5 |
| Referrals in Recruitment Marketing Platform Enhancements | 5 |
| Email Drip Marketing | 7 |
| CRM Improvements | 8 |
| Other Enhancements and Updates | 9 |
| Integrations | 9 |
| New Recruitment Marketing Job Board Integrations | 9 |
| Recruitment Marketing Integrations | 10 |
| Evolve ATS Partner Integrations | 10 |
| Evolve ATS Integrations | 10 |
| Analytics | 10 |
| Referrals Looker Model Update | 10 |
| Other Enhancements, Fixes, and Updates | 10 |

Overview

Release Date

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

Release Impact

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

Technical Requirements

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

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.

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

Disclaimer

Evolve reserves the right to make changes to the information contained in this document at any time without notice. Nothing in this document is intended to represent any form of offer or provide any warranties. All use of Evolve's products and services are by agreement and only the terms and conditions in an executed agreement will apply. This document may only be reproduced and distributed in whole for use by licensed users. No part of this document may be reproduced in any form for any other purpose without the prior written consent of Evolve. The software described in this documentation is copyrighted and is confidential information and a proprietary product of Evolve. Evolve and the Evolve logo are registered trademarks. Evolve product names are the trademarks of Evolve. All other product names mentioned in this manual are the property and may be trademarks or registered trademarks of their respective owners and are used for identification purposes only.

ATS and Onboarding

Portuguese (Brazil) Language Support

Customers who have presence in multiple countries require the Evolve ATS and Onboard to be accessible by different users with different locale and different language preferences. Specifically, customers who have a larger presence in Southern America require support for Portuguese.

What Changed

This new enhancement allows Evolve ATS and Onboard to be fully accessible in Portuguese.

How to Use

- Admin Navigation: Enable this feature by navigating to *Admin* → *Configurations* → *Regional Settings* → *Edit Language*
- User Navigation: Enable this feature by navigating to your *User Menu* → *Profile* → *Regional Preferences* → *Language*

NOTE: This feature needs to be enabled in Track company settings and the user's My Account settings.

Salary Transparency Support

Customers with U.S.-based jobs are seeing increasing requirements to post salaries for job in certain states. Each job board also has different requirements and may post a *range* for a job posting, even when no salary information is provided by the customer.

What Changed

Four new fields have been added for Requisitions to support our customer's efforts to provide salary transparency.

- Salary Min
- Salary Max
- Salary Frequency
- Salary Currency

These standard fields allow a customer to provide all relevant information in the requisition to be used to provide external transparency. We have mapped the fields to match each Job Board's specifications, ensuring the customer has maximum control over what data is being posted to external job boards.

How to Use

Admin Navigation: *Admin* → *ATS* → *Requisition Templates*.

Edit the template to add Salary fields to the desired Requisition templates.

NOTE: These fields must be added to the Requisition templates by a Evolve ATS user, as they may not be used for every template, depending on the location.

SMS Consent

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

What Changed

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

How to Use

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

NOTE: Turn on via Mass Roll Out – “Enable.Sms.Consent:”

OFCCP – Voluntary Self Identification Form Update

The previous Voluntary Self-Identification of Disability form has expired as of May 31,2023. OFCCP revised the form to update the preferred language for disabilities and to include additional example of disabilities and to include additional examples of disabilities.

As per the instructions from Management and Budget (OMB), the new form must be implemented by July 25. 2023.

What Changed

In order to enable customers to stay compliant with the above instructions, we have updated the OFCCP – Voluntary Self Identification form as per the guidance provided by the Office of Management and Budget (OMB), U.S. Department of Labor.

Recruitment Marketing

Referrals in Recruitment Marketing Platform Enhancements

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

Key Benefits:

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

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

Enhancements and Fixes

- Custom Eligibility Rules
 - (Enhancement) Company Admin can set up eligibility rule based on past applications
 - Use Case – exclude candidates who previously applied to same job (or any jobs)

- Rule includes date range of ATS job application date
 - Can be query based on other properties, such as Job ID, Job Title, Status
- (Enhancement) Assert eligible referral records from ATS applications
 - Additional use cases are now covered
 - Now includes support for ATS applications (customers not using Apply Workflow, Evergreen Req Movement, Recruiter Candidate Movement).
- Administrator Override
 - (Enhancement) Company Admin can override the candidate name and email
 - Allows correction of typos
 - Allows fixing email address used by applicant (vs the referred email address)
 - (Enhancement) Improved Filter usability and layout
 - Slide out from side to make better use of screen space
 - Added Date Range selector (From, To)
 - (Fix) Improved Performance of Employee filter when there were many users in company
- Candidate Consent to Share Updates to Employee – The Company Admin can enable to feature and configure the labels.
 - When Enabled: On **Apply**, the candidate will answer a consent question to share their application updates to the referring employee.
 - If consent **given**, the employee is notified via email and will see status updates in their Employee portal.
 - If consent is **not given**, the employee is not notified of disposition changes via email, and will see status updates in their Employee portal.
- Referrals Log
 - (Enhancement) User can now filter date by *All Time*.
 - (Fix) Changed default end filter date to today +1
 - (Fix) Employee ID previously display internal ID, fixed to show the proper value
- Other
 - (Fix) Notifications – Now shows *From User* name for ineligible emails sent to employee
 - (Fix) Improved Performance of Status update from ATS applications – faster after ATS sync, more reliable, improved monitoring
 - (Fix) Duplicate referral record (same job/candidate/employee) when candidate applies for a job (1 referred record and 1 applied record) when Ineligible
 - (Fix) Text-to-Refer – referrer_email (and referrer_external_id) lookup was case sensitive, fails to create referral record
 - (Fix) Applicant Status for Referrals was not updating in some situations.
 - (Fix) Social Referral with Pre-Apply – A referral record was not being created if *Assert* feature was not on. Now, it no longer requires the *Assert* feature.

Email Drip Marketing

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

Key Highlights

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

Enhancements and Fixes

- Recipient List
 - User can open Recipients list from Email Campaign (Campaign List, Email Campaign Details)
- Auto-Email Add to Email Campaign
 - User can define an Auto-Email (on Job, Folder, or Talent Network) to add to an Email Campaign
 - Indicator on Email Campaign list that is used in auto-email
- Email Campaign Exit Rules
 - User can define exist rules on a campaign
 - Exit rules can include of the Join Talent Network, Apply to Job, or change the Lifecycle to a selected value
 - When one of the exit rules is met on a candidate, the candidate will not receive subsequent emails from the campaign
 - A removed event is recorded for campaign analytics
- Analytics
 - Email Campaign Report tab shows Removed candidates count
 - Drip Email Campaign dashboard report in Analytics > Telemetry
- Other
 - (Fix) Sporadic database connection error affects sending mass emails
 - (Enhancement) Campaign and Source privilege has been renamed to "Mass/Drip Email".
 - (Enhancement) A warning popup has been added when a user *Cancel*s or *Complete*s an email

campaign used in auto-email.

- (Fix) Exist Rules are now cloned when an email campaign is cloned.]
- (Fix) The Exit Rule “Applied for a job” now checks for the date of the job application.
- (Enhancement) System audit - Email Campaign status changes are recorded (*New, Scheduled, In Progress, Completed, Paused, or Cancelled*).
- (Enhancement) Will now detect *Invalid* status before a campaign starts (user is deleted, job is unpublished, etc.).
- (Enhancement) An *In Process* email campaign will now be paused if the campaign has invalid career site merge fields.
- (Fix) The Job Apply URL did not point to a selected career site when the career site is not required on the email.
- (Fix) The system was not preserving the career site name while editing an email campaign step if the email body had only the Job merge field.
- (Fix) Email Campaign, Mass Email – The Messages tab in the profile was displaying the email creator and email sender, this now only shows the sender.

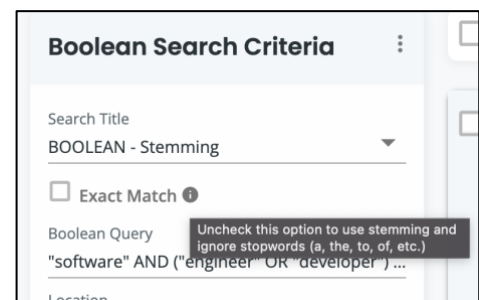
CRM Improvements

Sort Candidates in CRM

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

Improved Boolean Search

- (Enhancement) Boolean search supports stemming
 - Option “Exact Match” (on by default on each Boolean search) can be unchecked to enable searching to include stemming words (i.e. manager → also matches on management, manages)
- (Enhancement) Boolean search does not search in Job Applications and Visitor data



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

CRM Enhancements and Fixes

- (Enhancement) New API to Update Lifecycle of a Candidate in CRM
- (Fix) Editing Candidate Notes in RM
- (Enhancement) Users without privilege will no longer see Lifecycle and Audience fields on auto-search setup
- (Enhancement) System Audit – An audit of saved searches is now available
- (Enhancement) Excludes users with only Employee role from the user dropdowns (Send Email, Email Campaign). This will make it easier to locate the appropriate *From User* when sending emails or texts.
- (Fix) The Visitor record was not showing the Summary details in the grey bar on the visitor slug.

Other Enhancements and Updates

Career Site Improvements

- (Enhancement) Agency Portal – Translations for Agency login in 42 languages/locales

Other Enhancements

- (Fix) System Audit – *Update User* has been fixed
- (Enhancement) Job – Custom Field – Date Format Configuration
 - Services users can now configure the expected custom field incoming format. If left blank, the current default logic will use YYYY-MM-DD.
- (Fix) Internal – Career Site Authentication – Force logout and login will now happen to a user when accessing a different accounts internal career site (including SSO logout support).
- (Fix) Candidate Portal – Previously, users could not access the portal with a non-primary email address of a CRM candidate. This has been resolved.
- (Enhancement) Candidate API – The Candidate API can now look-up by an Employee ID.
- (Enhancement) Internal – SAML – Added an automatic role update option for SAML settings.

Integrations

New Recruitment Marketing Job Board Integrations

Per Post/Selective Broadcast

- PracticeMatch
- PracticeLink
- Magnet
- ZBP
- karriere.at

Other Enhancements and Defect Fixes

- (Enhancement) Auto-Broadcast Settings Improvement

EVOLVE

Talent Acquisition Suite

- Improved the layout for the Configuration screen (grouping features together)
 - (Enhancement) Dynamic posting date – Now allows configuration of a date to use as a posting date to various job boards coming from the ATS or shown on the career site.
 - (Enhancement) CTP – Added Salary information.
 - (Fix) – Indeed Apply – Excluded *read only* questions and blank answers
 - (Fix) Indeed Apply – fix for handling blank question values
 - (Fix) Job Board Apply – improved handling of question lookup submissions to prevent missing questions
- Recruitment Marketing Integrations

Recruitment Marketing Integrations

CSV Employee Export

- (Enhancement) Add Lifecycle support for inactive employees

Evolve ATS Partner Integrations

- Verified First (Background check provider)
- Alva Labs (Candidate assessments)
- Shield Screening Partner (Tazworks) (Background Check Provider)
- Talenthub (Experience Survey Provider)

Evolve ATS Integrations

Indeed Candidate Sync

- Indeed Candidate Sync is a tool that lets you extract candidates from Indeed Resume, Hosted Jobs, and Indeed Hiring Platform products then push the candidates into your Evolve ATS tenant. This was created as an initial step to better connect a client's Indeed candidate pool with Evolve ATS. This replaces the earlier Indeed Recruiter Extension Chrome extension – no browser extensions are required with Candidate Sync. This feature requires small activation steps on both the Evolve ATS and Indeed side as outlined in the *Indeed Candidate Sync Activation* guide (can be found in the Helpdesk).

Analytics

Referrals Looker Model Update

Enhancements and Fixes

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

Other Enhancements, Fixes, and Updates

Enhancements and Fixes

- RM Reports
 - Job Marketing Report

EVOLVE

Talent Acquisition Suite

- Drip Campaign Report
- (Enhancement) Email Campaign Report in CRM
 - In the Email Performance section, the following columns have been added:
 - Removed byt recruiter
 - Removed automatically
- (Enhancement) Mass Email Report in Looker
 - Customers are now able to see mass email activity and performance in Platform Analytics under the Recruitment Marketing → Email/SMS folder.