EVOLVE

TALENT ACQUISITION SUITE

Release Notes

September 2023

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  Talent Acquisition Suite

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Overview

Release Date

The Evolve Applicant Tracking System (ATS) and Recruitment Marketing (RM) Releases are scheduled during the maintenance window on Wednesday, October 11th. 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.

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ATS & Onboarding

Microsoft Office 365 Delegate

The Application Permission with Jobvite's Office 365/Exchange Cloud (Application) grants our application (i.e. Jobvite) permission to read and write to all calendars within their Office 365 tenant.

What Changed

With the new Office 365/Exchange Cloud (Delegate) integration, each recruiter must authenticate to their own Office account. We use that account when reading and writing to calendars within their Office 365 tenant. Microsoft enforces all account-related permissions and access. If you cannot read/write to it in Outlook, you cannot read/write to it from within Jobvite.

Value

- **Increased Security** – Using signed-in user Microsoft Permissions vs. Application Permissions. IT and Security teams approve the use of this integration.
- **Improved Usability** – Recruiters and schedulers can access Free/Busy statuses directly within Evolve ATS vs. toggling back and forth to an Interviewer's calendar via Outlook and ATS.
- **Productivity and Efficiency** – Recruiters and schedulers can quickly schedule interviews.
- **Improved Candidate Experience** – Candidates receive timely feedback when an interviewer is available for an interview.

Configuration

- Evolve ATS admins will need to select the integration:
  - ○ **ADMIN → Integrations → View Calendars → Office 365/Exchange Cloud (Delegate) → Save**.

- Evolve ATS users will need to authorize the integration:
  - ○ **My Account → Authorized Apps →** within *Integrations*, click **Sign in with Microsoft**.

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Recruitment Marketing

Candidate Sourcing Notification

Recruiters and sourcers are busy using multiple systems, including ATS and CRM. The timeliness of outreach to talent is important for success when using Jobs or Talent Pipelines. In order to quickly identify and respond to sourced candidates, they need to be notified when new candidates are sourced. Without notifications, they are prevented from timely outreach to candidates, resulting in lower success in application and hire rates.

What Changed

With the new notifications type, **Candidate Sourcing**, users get notified when candidates are added to their Jobs or Folders through several submission channels including auto-search, automated sourcing, referrals, and candidates submitted by external agencies or added manually by other users.

Value

- **Timeliness** – Notify recruiter and sourcers quickly of newly sourced candidates to allow for timely review and actioning.
- **Improved Usability** – Knowing that there are sourced candidates to review in Jobs and Folders; fewer clicks to get to sourced candidates from the notification; knowing when to review sourced candidates.
- **Productivity and Efficiency** – Recruiters and sourcers can focus on actioning and engaging with sourced candidates.
- **Improved Candidate Experience** – Candidates receive timely feedback when sourced or submitted for a job.

Features

- Users can configure sourcing notifications:
  - o Can choose In-App (On or Off)
  - o Can choose Email (Silent or Loud)
 - o Can choose to add notifications to your Email Digest

  *NOTE: The default for all users is **In App** = On, **Email** = Silent, **Email Digest** = On*

- Users can configure which sourcing notifications they wish to receive:
  - Can choose from My Job notifications for Agency, Auto-search, manual addition (by another user), Referral, Zero-click automated sourcing.
  - Can choose from My Folder notifications for Auto-search, and manual addition.

  NOTE: The default for all users is all **Sourcing Channels** *= On.*
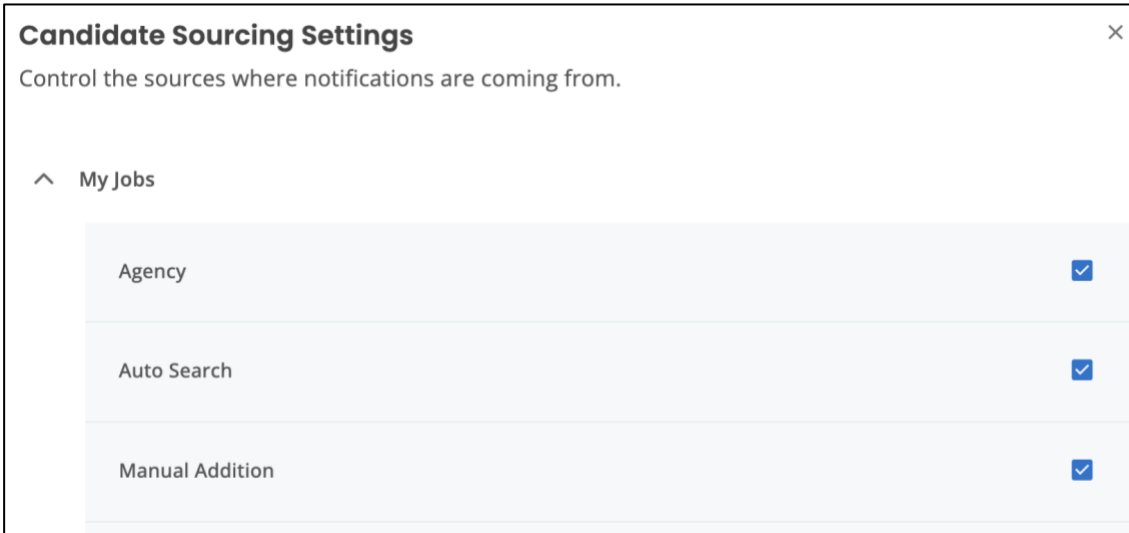
- Users can receive timely notifications whenever new candidates are sourced:
  - In-App – approximately every 2 hours
  - Email – approximately every 2 hours
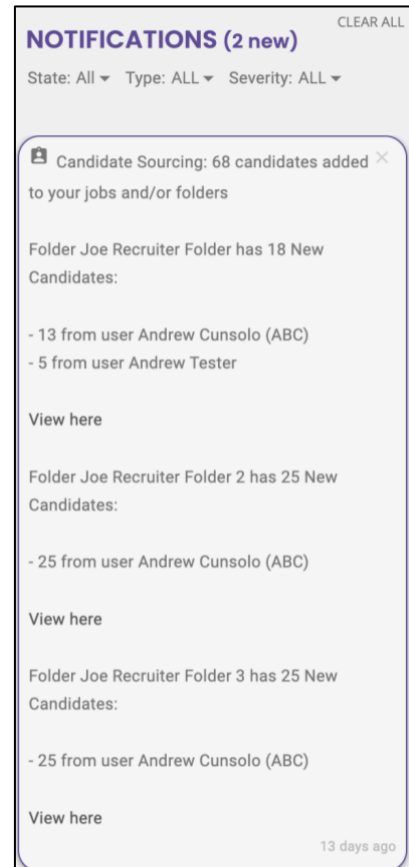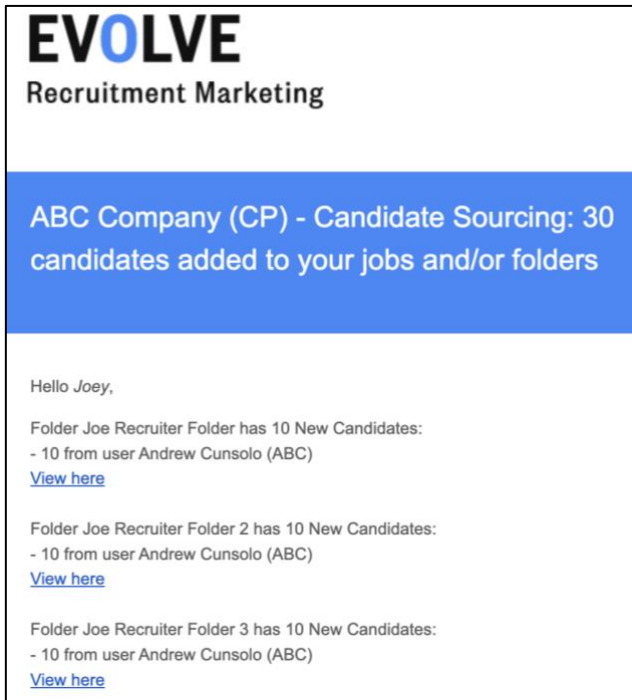
  - Digest – once per day in the morning, in the time zone of the user

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- Each notification contains information about the Job and/or Folder, the Number of Candidates added, and the related user or type of action that added candidates to the Job and/or Folder.
- Users can see the notification count over the Notification icon in the top navigation bar.
- Users can see the pagination of the notifications (using the Next/Previous arrows)
- Currently supports notifications for the following features:
    - Manual Addition (Job, Folder)
    - Auto-search (Job, Folder)
    - Zero-Click Automated Sourcing (Job)
    - Referrals (Job)
    - Submitted by Agency (Job)

Support

This feature will be rolled out in phases. Please contact the Support Helpdesk for additional information.

Please see the Candidate Sourcing Notifications in CRM Quick Start Guide for full details on this feature.

Conditional Questions in Apply Workflow

In Apply Workflow, the customer and Implementation team have a lot of flexibility with how question types are set up (i.e., Boolean, short or long text, multiple choice, date) as well as making a question required or not. There are some instances where the customer only wants a question to become visible (or required or not) depending on the answer to a previous question.

What Changed

Now, **Conditional Questions in Apply Workflow** can configure relationships between parent questions (Boolean or multiple choice/ single answer types) and child questions that are shown based on the answer to the parent question. Child questions can be any *Type*. The parent question and child questions can be required or optional.

Value

- **Improved Candidate Experience** – Only show relevant questions to the candidate depending on their answer to related parent questions. Reduces redundant questions.
- **Improved Implementation** – Evolve can completely replace the full application process used in any partner ATS with support for conditional questions and limits.

Configuration

- Evolve RM admins will need to configure a parent/child relationship within a question.
    - You can configure the child question to show based on an answer to the parent question.
    - The parent question type can be: Yes/No or multiple choice/single answer.
    - The child question can be any *Type*.
    - You can configure the child question to be required or optional.

Conditional Questions

Parent Question Id	Parent Question Text	Parent Question Type		
CRIMINAL-RECORD Child Questions (CRIMINAL-RECORD-DESC)	Have you ever been convicted of a crime? (Yes/No Parent)	Yes/No Sync Locked	✎ Edit	🗑 Delete
JOB-FAMILY Child Questions (JOB-FAMILY-NURSING,JOB-FAMILY-SURGERY-CHILD)	Please choose a medical profession (Multiple Choice/Single Answer Parent)	Multiple Choice / Single Answer Sync Locked	✎ Edit	🗑 Delete
LOCATION-PARENT Child Questions (LOCATION-CA-EAST,LOCATION-US-WEST)	Which location is of interest?	Multiple Choice / Single Answer Sync Locked	✎ Edit	🗑 Delete
Now displaying 3 of 3 conditional questions				

- Evolve RM admins can configure a parent question on an Apply Workflow step (you can also see related conditional child questions and if they are required or not).

Questions

Question		Type	Required	
CRIMINAL-R...	Have you ever been convicted of a crime? (Yes/No Parent)	Yes/No	☑	🗑 Remove
CRIMINAL-RE...	*Please describe the nature of your criminal record.*	*Long Answer*	☑	
JOB-FAMILY	Please choose a medical profession (Multiple Choice/Single Answer ...	Multiple Choice / Single Answer	☑	🗑 Remove
JOB-FAMILY-...	*Please choose a nursing specialty*	*Multiple Choice / Single Answer*	☑	
JOB-FAMILY-...	*Please choose a surgery specialty*	*Multiple Choice / Single Answer*	☑	
LOCATION-...	Which location is of interest?	Multiple Choice / Single Answer	☑	🗑 Remove
LOCATION-C...	*Which of the following Canadian Cities are of interest?*	*Multiple Choice / Multiple Answer*	☑	
LOCATION-U...	*Which of the following US West Coast cities are of interest?*	*Multiple Choice / Multiple Answer*	☑	

Save   Cancel

Features

- Apply Workflow Candidate Experience
  - When a candidate answers a parent question, a conditional child question can be either shown or hidden, and the child question can be either required or optional.
- Questions API Expansion
  - Provides API support for conditional questions.
  - Provides API support for min/max for Dates, limits for texts from the ATS.

Support

This feature will be rolled out in phases. Please have your Evolve admin contact Support for additional information on ATS supported integrations roadmap and targets.

New Jobs User Experience (Early Access)

Today's Jobs list and Job Search page for recruiters and sourcers is very limiting. The page performs poorly (slow search and response) and is not intuitive for users, leading to poor user experience and frustration. The available filters are limiting. They only allow for searching on a known job title or job external ID and status (archived or active). This is inadequate for recruiters and sourcers who are looking to find past applicants for similar jobs to re-engage to apply for current roles or pipelining.

What Changed

Now, **additional filters** including location, **full keyword search**, **org/division filters**, and even **custom fields** (to support any business process) are being rolled out to support these sourcing efforts.

Value

- **Improved Performance** – Job Search results are returned quickly, and filters return results quickly, which saves the user time.

- **Improved Usability** – Intuitive "Next Generation" user experience and improved adoption.

- **Expanded Filters to Pinpoint Jobs** – Additional standard filters to better pinpoint past roles with similar attributes or pipeline jobs.

Features

- Feature enabled on a per-customer basis (see Early Access schedule)
    - Users can see a new menu for All Jobs and Job Lists, but during the Early Access timeframe, the previous/legacy Job pages will be available.
    - Quickly work with Jobs and Job Lists (new user experience, fast performance of search, sort, and filter results).

- All Jobs (starting with All Jobs in the company)
   - See a redesigned Job List view (card view or table view).
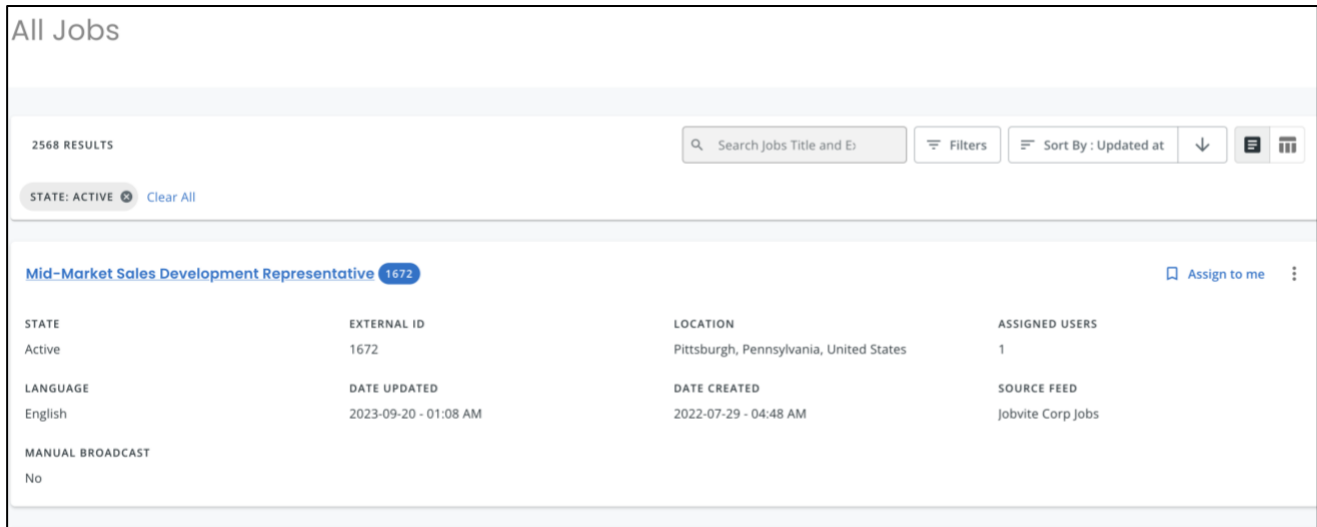
- Additional sort options on your jobs (Title, Created Date, Updated Date, External ID, Group ID, Location, Language, Feed).

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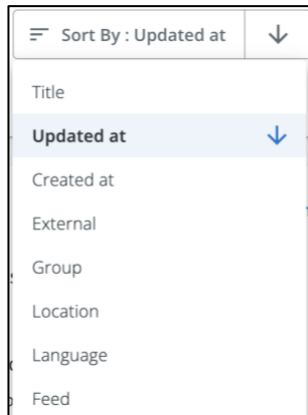
- o New filter options to help you refine your job search (Country Language, Org 1/2/3, Job Category, Job Subcategory, Reporting Region, Confidential, Remote Work).
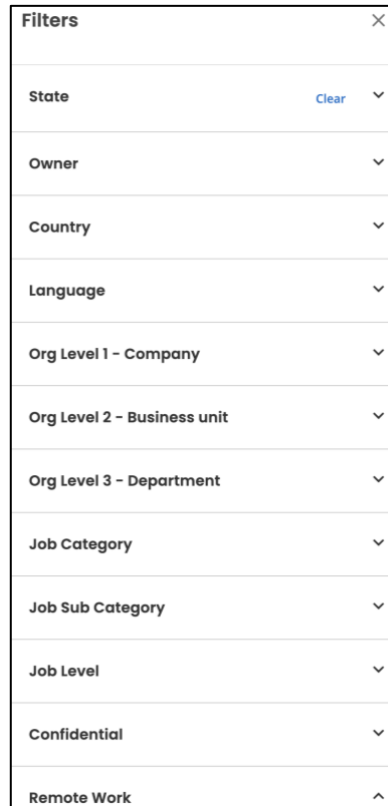
- o The redesigned Job Profile page will be available to easily access key information you need on a job (Job Details including standard and custom fields, Job Description, Activity History, Candidates Job List, Job List Membership, Job Group, Manual Broadcast, Auto-Broadcast, Broadcast History).
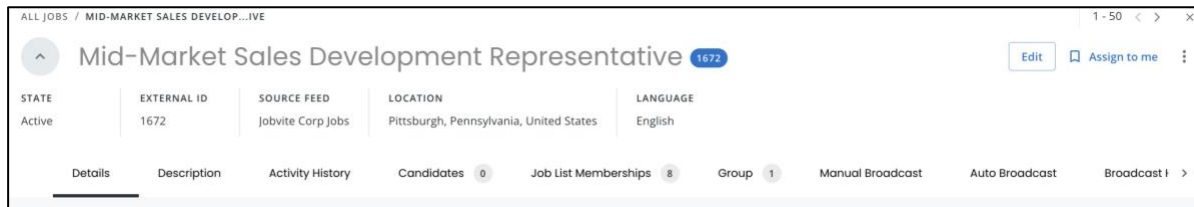
- Job Lists (starting with Jobs)
  - o New navigation to get to a set of jobs that are part of that job list and then further refine with filters, keywords, and sorting.
  - o Easily perform actions in the context of a job list.
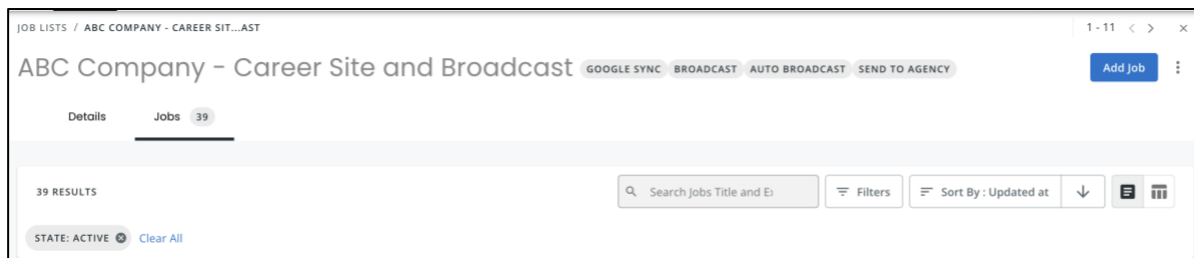
Referrals Improvements

Reminder to Apply to Candidates and Employees

- Company admin can configure a reminder email to candidates if they have not applied.
    - Specify Email Template
    - Specify the Number of Days after the Referral
    - Configure Job Referral or General Referral reminder templates
    - Merge codes can include the same as the candidate referral email when the referral was made
- Company admin can configure a reminder email to employees if their referral candidate has not applied
    - Specify Email Template
    - Specify the Number of Days after the referral
    - Configure Job Referral or General Referral reminder templates
    - Merge codes can include the same as the employee email when the referral was made

- After the *Configured Number of Days* has passed, if the referral candidate has not applied for the job
    - Send configured email template to candidate
    - Send configured email template to employee

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- Referral reminders sent are recorded in the Referrals Log
- (Enhancement) Additional email merge codes for referral date
  - {{Referral.DaysAgo}} – Sample Value = 3
  - {{Referral.DateInWords}} – Sample Value = May 11, 2023
  - {{Referral.DateTimeUTC}} – Sample Value = 2023-05-11 13:55UTC
  - {{Referral.DateTimeInWords}} – Sample Value = May 11, 2023 13:55 (UTC)
  - {{Referral.TimeAgoInWords}} – Sample Value = 3 days ago

Other Enhancements and Fixes

- (Enhancement) Configure ATS URL redirect employee referral parameters on the Career Site
  - Can define URL parameter mapping for Employee ID, Employee Email, Employee First Name, and Employee Last Name.

- (Fix) Duplicate referral record was created for ineligible referrals when following the same token.
- (Fix) Referral Log – Event Log – Error was displaying on some referrals (social created).

CRM Improvements

CRM Filters and Search

- (Enhancement) Recruiter can filter the Additional Filters Panel to find a filter.
  - Easier to search and find the filter that you want to use
  - Type ahead to match the start of any part of the filter name
- (Enhancement) Standard Filters Improvements

  NOTE: Rollout to customers began October 12, 2023

  - Degree Level Filter
    - Ability to exclude a degree
    - Removed *Nice to Have* ranking
  - Last Emailed, Last Viewed, Last SMS filters
    - The date range can be set as *Specific Dates*, *Before*, *After*, or as a relative date range (slider)
  - Industry, Major filters
    - Filters are converted from *ranking only* to *filter by*
    - Ability to filter by *ANY* or *ALL* options (And/Or)
    - Ability to exclude industry or major
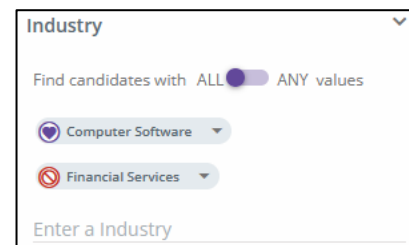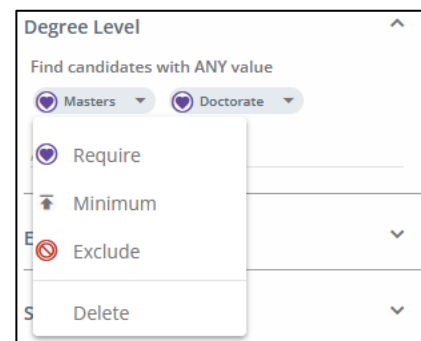
Other Enhancements and Fixes

- (Enhancement) Improved SAML user updates go to other modules synchronously.
- (Fix) Apply Launcher was shrinking on the Talemetry Career Site, causing the next step to not load at the top of the modal.
- (Fix) Job Alert – There was an encoding issue in the suggested Job alert causing the title to escape and not be readable.
- (Fix) Apply Workflow – Jobvite ATS – Multi-language Compliance Question – was always showing the English version of the compliance question on the dynamic question step.

Integrations

Recruitment Marketing Job Board Integrations

No new Job Board Integrations happened in September.

Other Enhancements and Defect Fixes

- (Enhancement) Referred Domain lookup to BID supported with ATS/Job Apply URL
- (Enhancement) ZipRecruiter – Support adding Custom Fields on a per-customer basis to the feed.
- (Enhancement) Indeed Apply – Configurable Date Format
- (Fix) Indeed and ZipRecruiter Job Board apply with screening questions do not check if a candidate submission contains all required questions. If missing one or more required questions, send an email to complete it.

Recruitment Marketing Integrations

No new Integrations happened in September.

Evolve ATS Integrations

No new Integrations happened in September.

Evolve ATS Partner Integrations

Employment Technologies (ETC) – Assessment provider that can be used for employment simulations and talent prediction

Testify – AI-powered assessment provider

Career.place – Anonymous candidate screening solution to aid hiring teams in avoiding biased-based recruitment

CoderPad – Coding assessment/interview provider

Catapult (Tazworks Partner) – Background Check provider that uses the TazWorks platform for their integration

Analytics

Company Benchmark Report

The prior Company Quarterly Hiring Benchmark report used outdated date logic. Regardless of activity (Job Created, Job Opened, Job Filled, Job Closed, etc.), it was logged under *Job Opened Date* in order to ensure that there was always a singular date to tie activity back to which caused the Quarterly Benchmark report data to not match other reports that use different activity dates.

What Changed

In the updated **Company Benchmark Report**, all activity is logged under the appropriate activity date, which makes the benchmarks (and current data) in these reports match data more precisely to the other reports in Looker.

Features

- New tiles have been added at the top of the report. Those tiles provide summary statistics on the performance of customer hiring processes.
  - Includes Total Jobs, Total Applications, Total Interviews, Total Offers, and Total Hires.
  - Customers can now see how we have classified their size and industry for benchmark comparisons.
  - All the tiles and tables on the previous report have been moved to the new report with the updated data model
- New filters
  - Customers can now filter the dashboard by Comparison Benchmark Size, Comparison Benchmark Industry, Date Range, and Date Breakdown (year, quarter, month).

New CRM Recruiter Activity & Automated User Activity Explore

A customer had multiple re-engagement reports that needed to be built off the CRM Recruiter Activity Explore to ensure it populated with the correct folder activity data, however, the explore as it exists today will not work because we need it to include activities done by the integrations API user.

What Changed

With the new Analytics Explore feature, we will be able to easily create re-engagement reports for our customers that include both recruiter activities and automated user activities so customers can review actions taken by multiple types of users in the system.