# EVOLVE TALENT ACQUISITION SUITE

**Release Notes** 

Q2 2023



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# **Overview**

#### Release Date

The Evolve Applicant Tracking System (ATS) and Recruitment Marketing (RM) Releases for Q3 have all been completed.

## 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's have be delivered to all Evolve customers automatically. There were no IT, project, or end-user requirements to receive the upgrade. The interface overhaul occurred 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**

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

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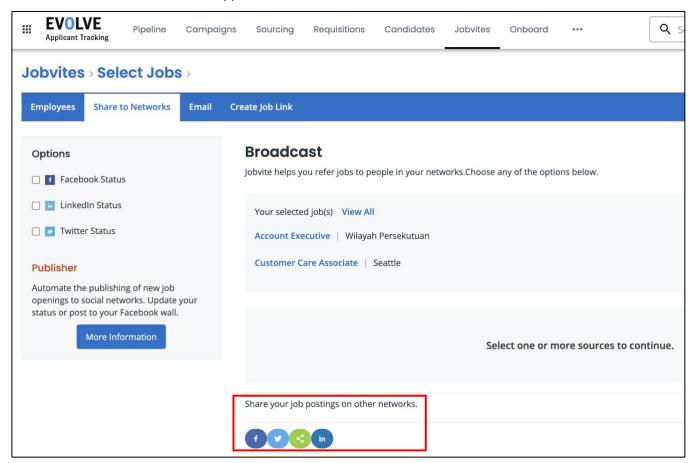
# **ATS and Onboarding**

# Social Sharing for Jobvites

In order to share Jobvites, users needed to create a job link and navigate to the relevant social channels where they wanted to share and post jobs.

#### **What Changed**

The Share to Networks functionality under the Send Jobvite option now includes 50 channels that the user can share Jobvite links directly to, all within the Evolve ATS application. Some of the key social channels include LinkedIn, Facebook, Twitter, Whatsapp, WeChat, Outlook, and Gmail.



NOTE: The upgraded social sharing has been enabled for all customers.

# **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.

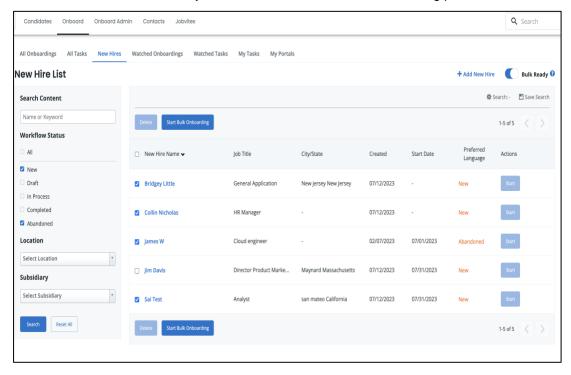
#### What Changed

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**

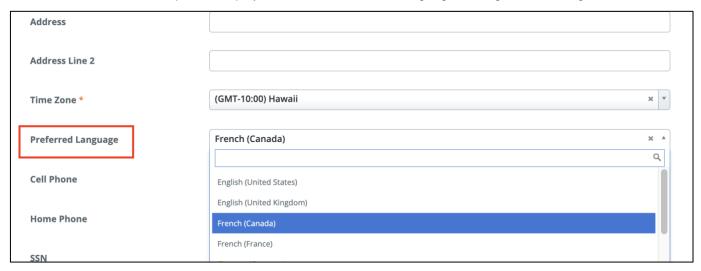
The New Hire experience has been improved by having the New Hire portal available in the candidate's **preferred language**. A new standard field, *Preferred Language*, has been added to the portal.

#### Configuration

- The Preferred Language field mimics the language logic built in ATS.
  - o First, refer to the value in the field Language for Automated Emails in the Requisition.
  - o 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.
  - o The dropdown displays the list of all available languages configured at an organizational level.



# 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.

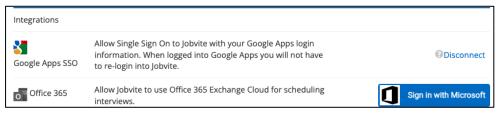
#### Configuration

- Evolve ATS admins will need to select the integration:
  - $\circ$  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.



# **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 iob.

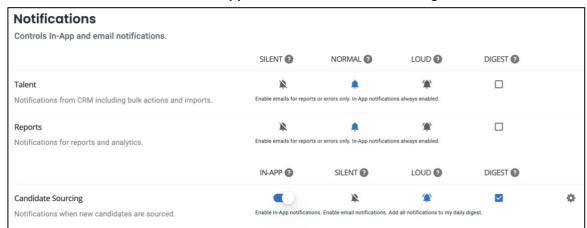
#### **Features**

Users can configure sourcing notifications:



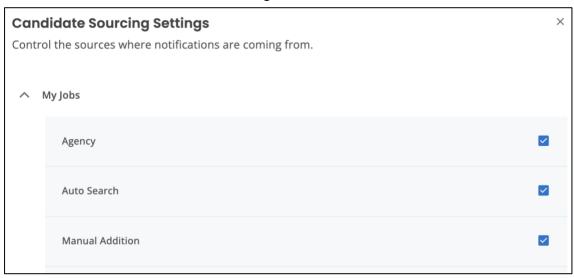
- Can choose In-App (On or Off)
- Can choose Email (Silent or Loud)
- Can choose to add notifications to your Email Digest

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



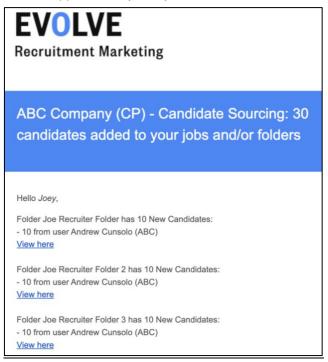
- Users can configure which sourcing notifications they wish to receive:
  - Can choose from My Job notifications for Agency, Auto-search, manual addition (by another user),
     Referral, Zero-click automated sourcing.
  - o Can choose from My Folder notifications for Auto-search, and manual addition.

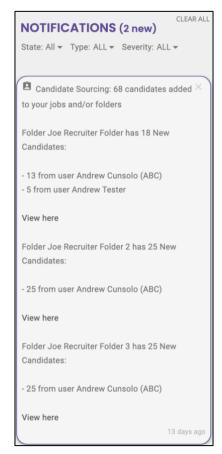
NOTE: The default for all users is all **Sourcing Channels** = On.





- Users can receive timely notifications whenever new candidates are sourced:
  - o In-App approximately every 2 hours
  - Email approximately every 2 hours





- o Digest once per day in the morning, in the time zone of the user
- 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**

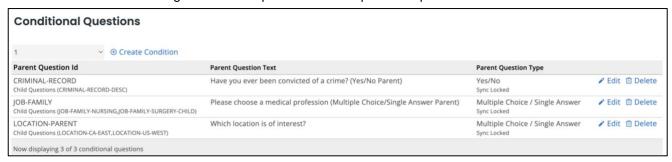
Now, Conditional Questions in Apply Workflow can configure relationships between parent questions (Boolean or multiple choice/ single answer types) and child questions that are shown based on the answer to the parent question. Child questions can be any *Type*. The parent question and child questions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

#### Value

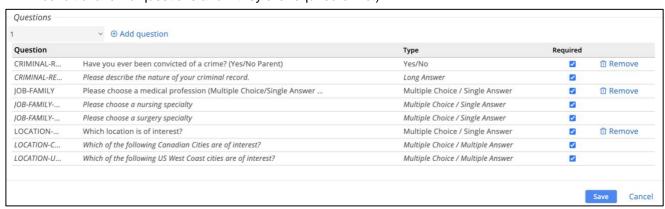
- **Improved Candidate Experience** Only show relevant questions to the candidate depending on their answer to related parent questions. Reduces redundant questions.
- **Improved Implementation** Evolve can completely replace the full application process used in any partner ATS with support for conditional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



• 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).





#### **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
  - o 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 <u>Support</u> for additional information on ATS supported integrations roadmap and targets.

## Referrals Improvements

#### **Referral Administrator Self-Service**

- (Enhancement) New User Experience to match Next Generation designs:
  - Improved layout of details on the Referral log.
  - Improved filter layout.
  - o Click **Apply Filters** to filter the referrals by the chosen filters.
  - Click X on any filter item to remove it from the filters.
  - New Table View option with columns. Click **Date Created** or **Date Updated** to sort ascending/descending.
- (Enhancement) Company Admin can create a historical referral record.
  - Example: A missing referral record assertion because the candidate applied with a different email address; correction for missing data.
  - Specifies all the data required for a referral, including name, email, date/time of referral, employee, job, status, eligible.
  - Referral record created, including audit log of who created the record.
  - o Treated like regular referrals for calculations, eligibility incentives, etc.
- (Fix) Referral Log
  - Event Log Application Status Sent was always showing Yes. This is now correctly showing when the email has been sent or not.

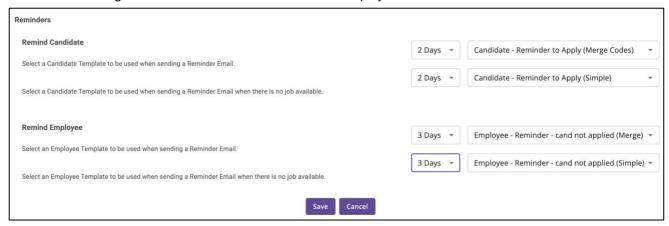
#### Reminder to Apply to Candidates and Employees

- 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
  - o Merge codes can include the same as the candidate referral email when the referral was made



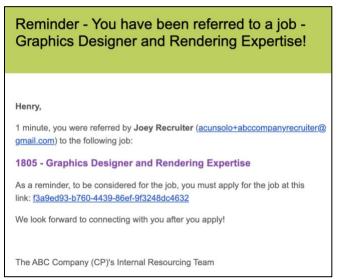
- - Specify Email Template
  - Specify the Number of Days after the referral
  - Configure Job Referral or General Referral reminder templates
  - Merge codes can include the same as the employee email when the referral was made

Company admin can configure a reminder email to employees if their referral candidate has not applied



- 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





- 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) Candidate Consent to Share Updates with Employee Only show *Consent* question to candidates when they apply and are related to a referral.
- (Enhancement) Apply Launcher Allow Employee Application without a job.
- (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.

Referral Parameters

empid:external\_id, empemail:email

Type parameter:user\_attribute comma separated, f.e ref\_email:email,ref\_id:external\_id

- (Fix) Candidate Consent to Share Update with Employee Fixed to collect and record consent on Preapply.
- (Fix) Gamification Leaderboard is no longer showing blank values.
- (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.
- (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 Sort**

- (Enhancement) Sort by First/Last name has secondary order by the Last/First name accordingly.
- (Enhancement) Sort by First/Last name defaults to Ascending.

#### **Email Campaign**

- (Enhancement) Email Campaign New Exit Criteria: The candidate is moved to a selected CRM stage.
  - 3 new rules are available Selected Stage in Folder, Selected Stage in Job/Event, and Selected Stage in Talent Network.
  - Select the associated Stage.
  - When a candidate is moved to that Stage in any Job/Folder/Talent Network (as configured) they
    are removed from that Emai Campaign.



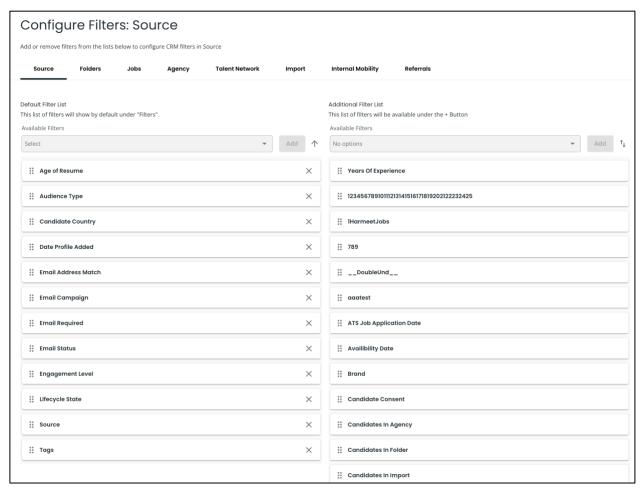
#### **CRM Filters and Search**

- (Enhancement) Filters with All/Any toggle allow filtering by All Excluded options in the following fields:
  - Audience
  - o Candidates in Folder
  - Candidates in Job
  - Candidates in Talent Network
  - o Candidates in Import
  - o Candidates in Agency
  - o Email Campaign
  - Engagement Category
  - Recent companies
  - Specific Source
  - o Tags
- (Enhancement) Relative Date Range slider has an option for 23 months.
  - This is to support GDPR re-engagement with a data retention policy of 24 months (send reengagement at 23 months)
  - This applies to the following filters:
    - Age of Resume
    - Date Profile Added
    - ATS Job Application date
    - Custom Date filters
- (Fix) Exclude attachments from the CRM search index.

#### **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.



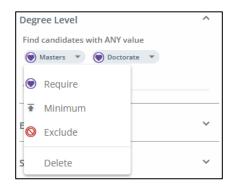


#### **CRM Filters and Search**

- (Enhancement) Recruiter can filter the Additional Filters Panel to find a filter.
  - o 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

Find candidates with ALL ANY values

Computer Software

Enter a Industry

- 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
- (Fix) Exclude attachments from the CRM search index.
- (Fix) Consent Filter Resolved behavior that was producing the wrong result when the ALL toggle and a
   Missing option were used together.

# 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 reengage 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.

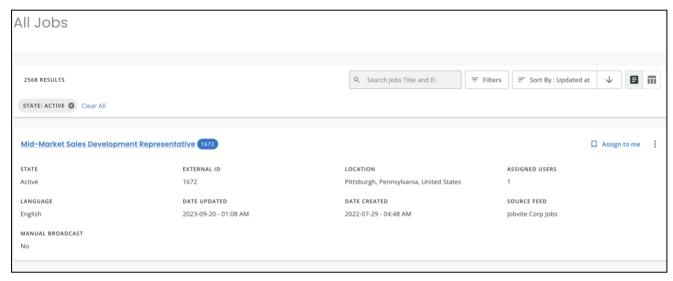
#### Value

- **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.

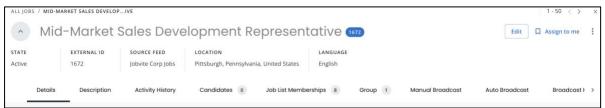
#### **Features**

- 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).

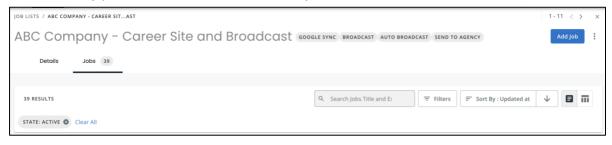




- Additional sort options on your jobs (Title, Created Date, Updated Date, External ID, Group ID, Location, Language, Feed).
- New filter options to help you refine your job search (Country Language, Org 1/2/3, Job Category, Job Subcategory, Reporting Region, Confidential, Remote Work).
- The redesigned 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)
  - 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.
  - Easily perform actions in the context of a job list.





# Other Enhancements and Updates

- (Enhancement) User Provisioning API support for country\_code lookup instead of country name.
- (Enhancement) Career Sites Content Page Edit improvements for Photos when working with large numbers of photos.
  - o Pagination for Available Photos section
  - Search option for Available Photos section
- (Enhancement) User API Update call to look up a user by External ID for the upsert call
- (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 autowidth.
- (Enhancement) Improved SAML user updates go to other modules synchronously.
- (Fix) Campaign Duplicate Campaign names were previously allowed, they no longer are.
- (Fix) Career Sites No error message was being shown when a user was trying to publish a site with the same domain name. An error message will now display if this happens.
- (Fix) Career Sites Users were able to create, edit, or delete a Workflow Launcher Key when the Career Site was in unpublished mode. Now these actions are only allowed when it's published.
- (Fix) Apply Workflow When WH/EH Start Date is later/greater than the End Date in Apply Workflow, it will
  provide the correct error message.
- (Fix) Apply Workflow Removed the incorrect State Codes from Country USA.
- (Fix) Apply Workflow Jobvite ATS Multi-language Compliance Question was always showing the English version of the compliance question on the dynamic question step.
- (Fix) Apply Workflow Brand edits not saving for Alternate and Secondary Contrast Text color have been resolved.
- (Fix) Email Templates could not be edited if the template creator is deleted. This has been resolved.
- (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.
- (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.



# **Integrations**

## Recruitment Marketing Job Board Integrations

#### **New Job Board Integrations**

- Per Post/Selective Broadcast
  - Idealist

#### Other Enhancements and Defect Fixes

- (Enhancement) Auto Broadcast LinkedIn Added Experience Level field
- (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) Auto Broadcast Indeed Now includes RemoteType logic for non-US jobs
- (Fix) AutoBroadcast When a Job List is created, it now defaults to the ATS/Configured URL
- (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**

#### **Enhancements and Defect Fixes**

- (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
- (Enhancement) Jobvite Candidate Import Send the candidate's employee ID along with the candidate source to Evolve ATS for internal candidates
- (Fix) Employee CSV Issues were arising with country\_code and country\_name mapping. This has been resolved and now Country Code mapping can be used for both users and CRM employee profiles
- (Fix) Infor Candidate Export Added a fix to resolve the candidate push when the candidate address had "&" in the address line
- (Fix) CSV Candidate Export Send candidate source specified in Agent when source values were not mapped to CSV field

# **Evolve ATS Partner Integrations**

- WOTC.com New ATS-based integrations have been set up in place of the prior Onboarding-based integration.
  - o 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.
  - Vervoe Assessment AI-Powered Job Simulation Platform Vervoe's job simulations and skills
    assessments use an intuitive machine learning AI to grade and rank candidates so you can see the
    best rise to the top in minutes, not hours.



- Employment Technologies (ETC) Assessment provider that can be used for employment simulations and talent prediction
- Testify Al-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.
  - o 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.



## Other Enhancements, Fixes, and Updates

#### **Enhancements and Fixes**

- (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.
- (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.

# **Intelligent Messaging & Al**

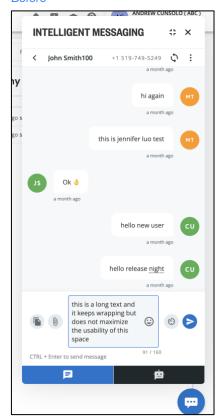
## Intelligent Messaging Widget

#### **Enhancements and Fixes**

- (Enhancement) Layout Improvements
  - Expanded texting area. Automatically expands as a user types.
  - Improved the layout of the action buttons.

NOTE: Improvements impact Evolve ATS and Recruitment Marketing, Lever, and JazzHR

Before



After

