

EVOLVE

TALENT ACQUISITION SUITE

Release Notes

November 2023



Talent Acquisition Suite

Table of Contents

Overview	3
Release Impact	3
Technical Requirements	3
Recruiter Productivity Takes Center Stage	3
Disclaimer	3
ATS & Onboarding	4
Requisition Automation when Closing/Filling (Early Access)	4
Bulk Invite Candidate to Self-Schedule (Early Access)	5
Other Enhancements and Updates	6
Hiring Team App	6
Recruitment Marketing	6
New Jobs User Experience (Early Access)	6
CRM Improvements	9
Other Enhancements and Fixes	10
Integrations	10
Recruitment Marketing Job Board Integrations	10
Recruitment Marketing Integrations	10
Evolve ATS Integrations	10
Evolve ATS Partner Integrations	10
Analytics	11
Campaign Source Activity Report	11
Campaign Email Pipeline Report	11

Overview

Release Date

The Evolve Applicant Tracking System (ATS) and Recruitment Marketing (RM) Releases are scheduled during the maintenance window on Wednesday, November 29th. 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

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 & Onboarding

Requisition Automation when Closing/Filling (Early Access)

Recruiters weren't navigating back to the Closed/Filled job to complete the following activities:

- Set Disposition
- Move to Rejected
- Send Candidate Message

This would lead to compliance and reporting concerns. For recruiters who didn't perform the closing activities, it was an extremely manual process (Bulk only supported up to 50 candidates).

What Changed

The ATS Admin can now configure multiple **Automation flows** that will automate recruiter activities associated with *Closing/Filling* a requisition. The Automation flow can be configured with the following actions:

- Set candidate Disposition
- Move candidate Workflow state
- Send candidate Message

Value

- **Productivity and Efficiency** – Reduces/eliminates recruiters manual tasks associated with Closing/Filling a requisition. This frees the recruiter's bandwidth to screen/interview other candidates.
- **Improved Customer's Data**
- **Improved Candidate Communication**

Create New Automation
⋮ ×

Name *

Type *

Service Account User *

When this happens

Trigger

↓

Continue if

Condition

If value is one of these

And

No Activities

[Add Condition](#)

↓

Then do this

Action

And

And

[Add Action](#)

Automation
×

Select which automation workflow you would like to apply to this Candidate List:

1 - 2 of 2 < >

Name	Action	
Req is Closed (Dev)	Set Disposition to "Not Hired"	<input checked="" type="radio"/>
Product Reqs	Send email "Candidate Rejected" and Move to "Rejected" and set disposition to "Not Hired"	<input type="radio"/>

1 - 2 of 2 < >

Bulk Invite Candidate to Self-Schedule (Early Access)

Previously, when Schedulers/Recruiters needed to schedule an interview, they would:

- View an interviewer(s) calendar to determine availability
- Select specific Date/Time blocks
- Confirm if a candidate is available via email, call, or text

What Changed

Users will now be able to bulk select up to 50 candidates and initiate the bulk action of [Invite candidate Self-Schedule](#).

NOTE: The candidate(s) will need to be on the same requisition and in the same Interview Type Workflow state.

Invitation to Self-Schedule

To: 50 candidate(s)

Interview Duration: 30 min

Interview Window: 7 days later

Interviewer(s): Tony Amsterdam

Meeting Room: Falls Creek

Conference Link:

Note : Please make sure you have reviewed all templates shown here. The Interview Invitation emails will be sent only if Auto-Schedule works and is able to schedule the interview based upon the availability supplied by the candidate.

- Availability Request To Candidate
- Interview Invitation(s) To Interviewer(s)
- Interview Invitation To Candidate
- Forward Interview Schedule (Optional)

Forward To: Add Recipient

Send as Calendar Invitation * Only schedule details will be forwarded

Cancel Send Message

Next, the user will be prompted to select the Interview Duration, Interview Window, and the Interviewer(s). They will also have the ability to select additional options such as a Meeting room and/or Conference Link.

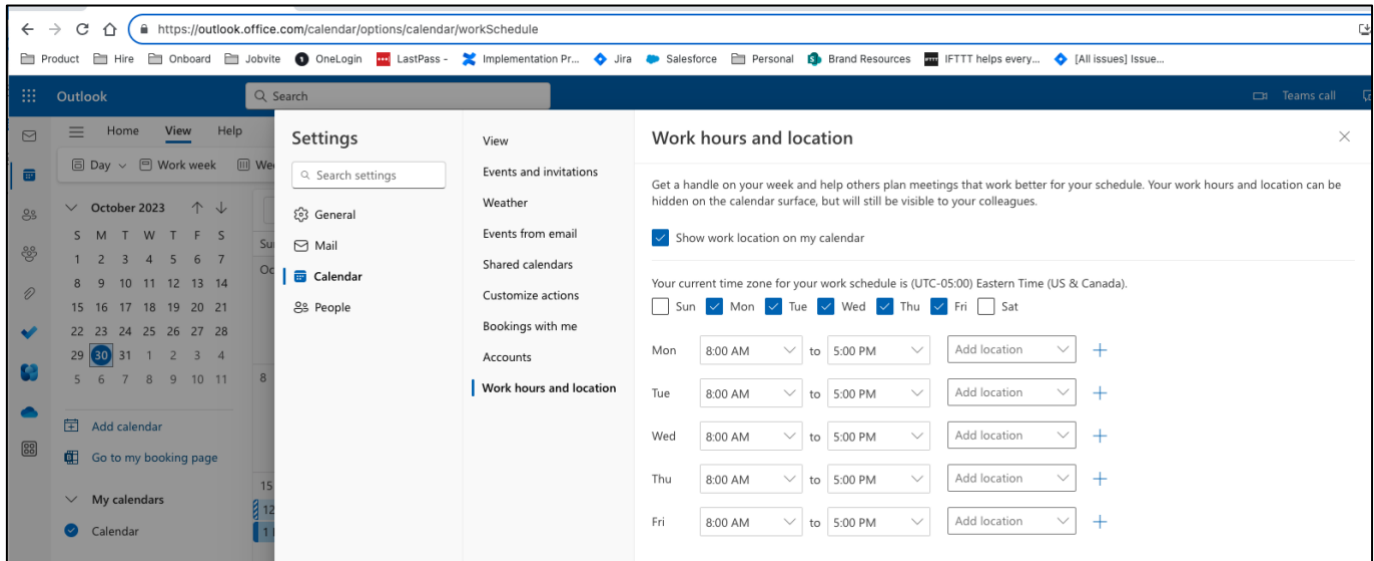
The candidate will receive an email with a unique link to view the interviewer(s) availability in real-time. Upon selecting the desired Date/Time, the system will automatically send the invitation to the interviewer(s) and candidate.

Value

- **Productivity and Efficiency** – Eliminates the need for viewing schedules inside/outside of Evolve ATS and the need to manually invite a candidate. Reduces the time it takes to schedule an interview.
- **Improved Candidate Experience** – Reduces the time it takes to schedule an interview. Reduces the need for rescheduling due to constant schedule changes.

Requirements

- The customer must be using one of the following calendar integrations (ADMIN → Integrations → View Calendar):
 - Office 365/Exchange Cloud (Application)
 - Office 365/Exchange Cloud (Delegate)
- Interviewers must ensure their Work Hours are up-to-date within their Microsoft Cloud account.



Other Enhancements and Updates

Hiring Team App

Updated to support the latest 3 versions of iOS and Android (i.e. \geq Android 11 and \geq iOS 13).

Recruitment Marketing

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. It only allows searching on a known Job Title or External ID and Status (active or archived). 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. Having additional filters including location, full keyword search, org/division filters, and even custom fields (to support any business process) is critical to support these sourcing efforts.

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.

Candidate Count on Jobs

- Sourcer can easily find similar filled/past/archived jobs and engage past applicants.
- Sourcer can see the Candidate Count on a Job list (card or table view).
- Sourcer and Sort by Candidate Count
 - Default is in descending order
- Whenever a new candidate is added to a Job (from ATS Apply, Sourcer Activity, Auto-Search, Agency, ZCIS), update the candidate count

All Jobs

2570 RESULTS

STATE: ACTIVE

Business Analyst 695

STATE	EXTERNAL ID	LOCATION	ASSIGNED USERS
Active	695	Toronto, Ontario, Canada	2
LANGUAGE	DATE UPDATED	DATE CREATED	SOURCE FEED
English	2023-07-27 - 06:57 PM	2012-05-02 - 04:24 PM	TEST JOB FEED FROM HD - WORKOPOLISCOR
CANDIDATE COUNT	MANUAL BROADCAST		
880	Yes		

Registered Nurse 541

STATE	EXTERNAL ID	LOCATION	ASSIGNED USERS
Active	541	Toronto, Ontario, Canada	4
LANGUAGE	DATE UPDATED	DATE CREATED	SOURCE FEED
English	2023-10-17 - 03:37 PM	2012-04-30 - 03:01 PM	TEST JOB FEED FROM HD - WORKOPOLISCOR
CANDIDATE COUNT	MANUAL BROADCAST		
596	Yes		

Custom Field Job Filters

- Company Admin can define a Custom Field as a filter
- A recruiter can filter jobs by a defined Custom Field
 - Values shown in the filter are available values on lists of jobs

NOTE: Custom field must be mapped to a custom field index (cfm1 to cfm25)

NOTE: The current release supports Lists and Centralized List type custom fields

Edit Custom Job Field

Information

Label required
 Facility
Will inherit Name if left blank.

Field Type
 List

Name required
 test
Identifier name (cannot be changed)

Locale
 English

List Value Setup

List Values

Main St Hospital:A
 Regional Hospital:B
 Local Hospital:C
 Regional Cancer Center:D

External List Values ID

This identifier is used by ERP's to automatically sync List Values through the API

Instructions: One label:value pair per line separated by a colon (no space between the colon and the label/value). Example:
 Full Time:FT
 Part Time:PT

Settings

Show in XML feed

XPath to XML Node value for ERP feeds

Feed Node Mappings

XPath to XML Node value for ERP feeds

⚠ Service Console User: Mapping Caution

Updating field mappings is an expensive process. Jobs and fields sync will be scheduled 2 hours from now. Please ensure all your configuration changes are made within this timeframe to avoid duplicate syncs. Removing or changing indexed order of fields has a direct impact on the URL generated. The same is true for updating field labels as these are mapped to permalinks ie: "Sales and Service" is mapped to "sales-and-service". Changing the label to "Sales & Services" would change the permalink to read "sales-services" invalidating the previous permalink. Ensure customers understand this when using this feature with permalink based faceted search.

Mapped Index
 cfm16

Enable as filter for Jobs

[Update](#) or [Cancel](#)

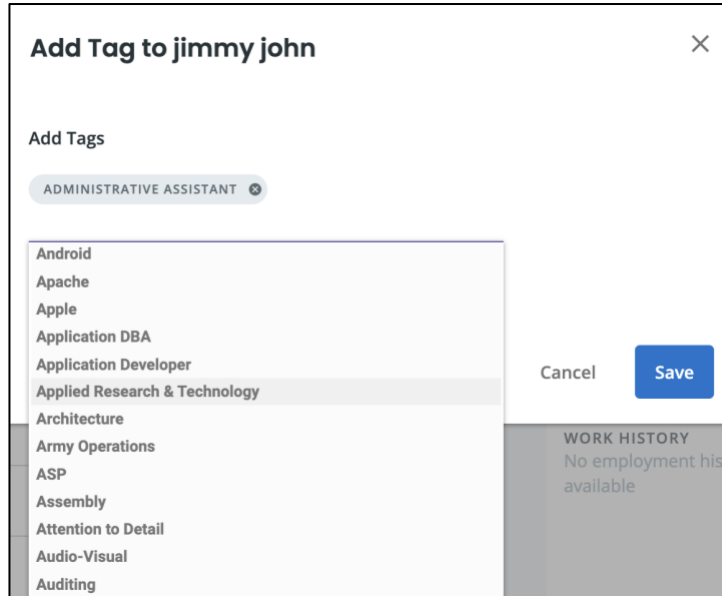
Value

- **Improved Performance** – Job search results returned quickly, filters return results quickly, save user time
- **Improved Usability** – Intuitive “Next Generation” user experience, improved adoption
- **Expanded Filters to Pinpoint Jobs** – Additional standard filters to better pinpoint past roles with similar attributes to new or pipeline jobs

CRM Improvements

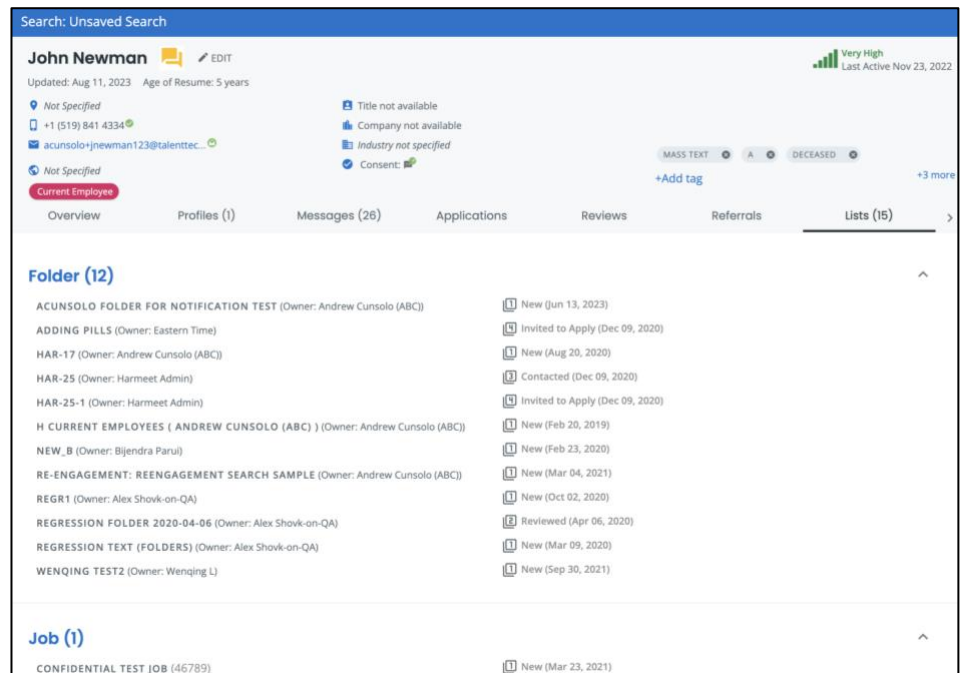
CRM Filters and Search

- (Enhancement) Add Tags – scrollable tag available, does not require typeahead



Other CRM Enhancements

- (Enhancement) – The job link on the Lists tab within the profile redirects to that Job Candidates list and opens the candidate profile.
- (Enhancement) – All Resume Database Job board licenses for a deleted/disabled user are also deleted.
- (Enhancement) – The recruiter can see the date when a candidate has been added to a CRM stage.
- (Enhancement) – SMS Templates allow up to 320 characters.
NOTE: Removed Related Keywords option from the Keywords field. No longer used.



Other Enhancements and Fixes

Conditional Questions

- (Fix) API – Could not create numerous Multiple-choice answers with just one answer using API.
- (Fix) API – Changed to use parent_answer_id instead of parent_answer_value. Fixed to make sure it works for i18n and allows a user to change the labels.
- (Fix) Fixed the length for questions (in the Apply step/conditional questions page).
- (Fix) Truncate the list of child questions (with hover) on the Conditional Questions list page.
- (Fix) Show no locale code for non-language-aware questions in the Conditional questions page.

Other

- (Enhancement) – Messages API – now supports Adding Tags.
- (Enhancement) – Copy Content Headers when cloning a Career Site.
- (Enhancement) – Improved performance of Apply Workflow when loading questions with a large list of answers. Added caching.
- (Fix) Could not see the Display Intelligent Messaging Widget in emails (Drip campaigns).

Integrations

Recruitment Marketing Job Board Integrations

No new Job Board Integrations happened in November.

Other Enhancements and Defect Fixes

- (Enhancement) ZipRecruiter – ZipApply – support for Date type screening questions.

Recruitment Marketing Integrations

(New) CSV Candidate Import

- Added functionality to pass data from Talemtery to customer SFTP server.

(Enhancement) Jobvite Candidate Import

- Pass SMS Consent from Talemtery Apply to Jobvite.

Evolve ATS Integrations

[Private Eyes Background Checks](#) – Leading background check provider

[Reevolt.co](#) – AI-based solution provider for unbiased job descriptions and candidate resume scoring

[AccusourceHR](#) (TazWorks Partner) – Background check provider that hosts integration on the TazWorks platform

[Universal Background](#) – Comprehensive background check provider

Evolve ATS Partner Integrations

No new Integrations happened in November.

Analytics

Campaign Source Activity Report

The CRM reports look and feel outdated to customers, plus it is running on an old data warehouse – where we have reached out capacity storage, causing us to manually remove data periodically which is time-consuming and costly. Old reports were running on a different data source, creating a significant amount of data quality issues and support tickets to investigate the differences between old reports and Looker.

What Changed

Now, the Recruitment Marketing reporting for the Campaign Source report in the Campaign module will shift to run from Looker and will be accessed via analytics or embedded reporting. We will remove the outdated reports from the CRM.

Value

Moving to this approach and focusing on Looker will allow Jobvite to provide greater transparency, consistency, and better support CRM reporting. It also provides the needed updated look and feel that is consistent with our analytics. Customers are looking at the same report whether they use it in Looker or the CRM, so there will be no data differences and it will reduce maintenance load plus create more confidence in the data.

Campaign Email Pipeline Report

The Recruitment Marketing reports look and feel outdated to customers, plus it is running on an old data warehouse – where we have reached our capacity storage, causing us to manually remove data periodically which is time-consuming and costly. Old reports were running on a different data source, creating a significant amount of data quality issues and support tickets to investigate the differences between old reports and Looker.

What Changed

Now, the Recruitment Marketing reporting for the Campaign Source report in the Campaign module will shift to run from Looker and will be accessed via analytics or embedded reporting. We will remove the outdated reports from the CRM.

Value

Moving to this approach and focusing on Looker will allow Jobvite to provide greater transparency, consistency, and better support CRM reporting. It also provides the needed updated look and feel that is consistent with our analytics. Customers are looking at the same report whether they use it in Looker or the CRM, so there will be no data differences and it will reduce maintenance load plus create more confidence in the data.