EVOLVE

TALENT ACQUISITION SUITE

Release Notes

December 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, January 10th. 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

ATS & Onboarding

Automation Engine when Requisition Closes/Fills (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**

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.

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.

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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.
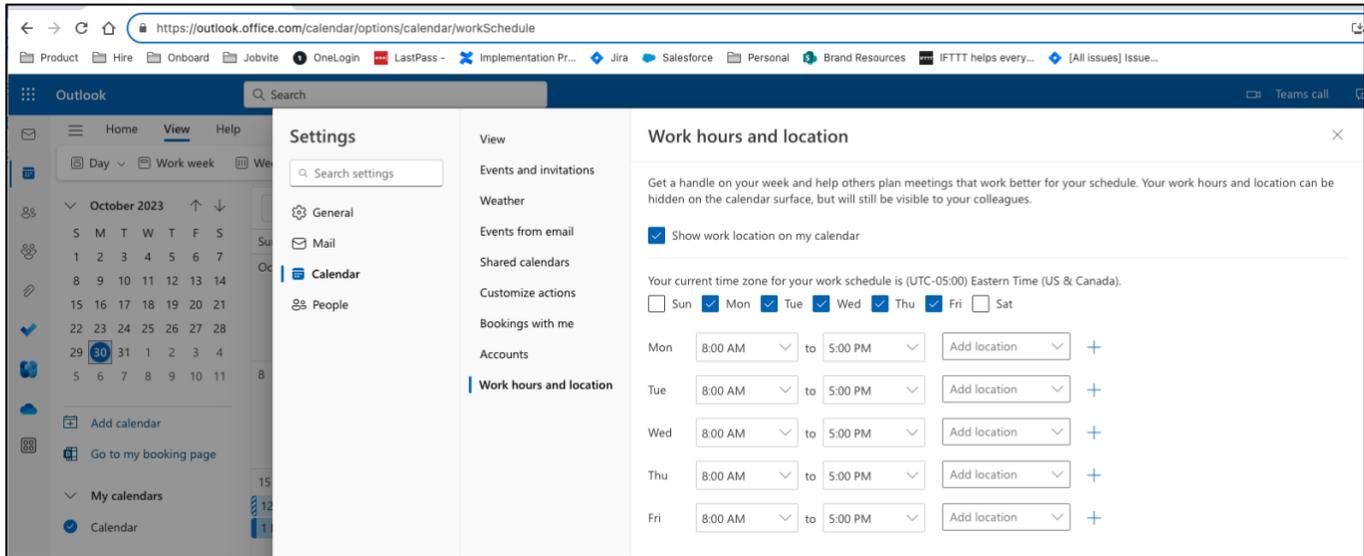
Other Enhancements and Updates

Hiring Team App

Updated to support the latest 3 versions of iOS and Android (i.e. >= Android 11 and >= 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.

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Job Filters

- Users can search jobs by full keyword
    - Any keyword type in the search box now searches the Job Title, External ID, and Job Description
    - Useful to find jobs that contain a particular skill, certification, or license requirement (to be used to support sourcing candidates with those requirements)
- Users can filter jobs by
    - Title
        - An open text box searches only in the Job Title field, for job titles with the text typed in
        - This can be *words starting with* or *full phrases*
        - *NOTE: You can still use the overall search text box*
    - External ID
        - An open text box searches only in the External ID or Group ID fields for Job IDs starting with the text typed in
        - *NOTE: You can still use the overall search text box*
    - Region
        - The dropdown for *City* will display all cities where there is at least one job with that city
    - *NOTE: The City, Region, and Country filters all work independently*
- Filters sorted by Name Ascending

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

Campaign Usability Improvements

Today's campaign pages for Recruiters and Sourcers are very limiting. The pages are not intuitive for users and have limited capabilities, leading to poor user experience and frustration. The available filters are limiting. Sorting is not available, and some pages don't have pagination and can perform poorly when a company has 100s of items.

What Changed

Now, having additional **features**, **filters**, **sorting**, and **pagination** will make it easier for Recruiters and Sourcers to use these pages.

<u>Enhanced User Experience for Campaign Codes Pages</u>

- New List Page for campaign codes

- Search for campaigns by *Name*, *Code*, *Description*, or *Created by*

- Filter by *Active*

- Easily copy the campaign code to the clipboard

- Sort by *Created At*, *Updated At*, and *Name ascending* or *descending*

Campaign Codes

Add Campaign Code

4 RESULTS | 🔍 veteran ✕ | ☰ Filters | ☰ Sort By : Name ↑

NAME ↑	ACTIVE	CREATED BY	CREATED	UPDATED	CODE		
Veterans Day 2018	No	Steven Ho	2018-06-25 - 05:48 PM	2023-12-04 - 12:12 PM	h2uQIJksrXQbhmHVBs5I-A 🗐		⋮
Veterans Day 2019	No	Steven Ho	2018-06-25 - 05:48 PM	2023-12-04 - 12:12 PM	Lh1KGDCaHkTLsHUTj71mcA 🗐		⋮
Veterans Day 2020	No	Steven Ho	2018-06-25 - 05:49 PM	2023-12-04 - 12:11 PM	XRefEhUKHxRRUaGptfr7dg 🗐		⋮
Veterans Day 2023	Yes	Andrew Cunsolo	2023-12-04 - 12:11 PM	2023-12-04 - 12:11 PM	sflUE8odFEYMqcvOwECpTg 🗐	CREATE URL	⋮

1 TO 4 OF 4   50 Items ▾

<u>Enhanced User Experience for Mass Email Page</u>

- New list page for Mass Email

Mass Email Management

ℹ️ Mass Email report is now available in the Email/SMS folder in Analytics. To access Analytics, click the nine-dot menu on the top left.

Unless configured on the message, Talemetry does not schedule subsequent email batches to be sent on Saturdays and Sundays to maximize clickthrough rates.
Dates and times are in Eastern Time (US & Canada)

15 RESULTS   ☰ Filters

STATUS: SCHEDULED + 5 ⊗

NAME	STATUS	RECIPIENTS	START/END DATE	SENT/REMAINING	COMPLETE%	BOUNCED%	UNSUBSCRIBED%	SPAM%	
1aae - (11-29-2023) 👁 Andrew Cunsolo (ABC)	Paused	5	2023/12/15 - 01:00AM PAUSED	0/5	0%	0%	0%	0%	⋮
Unsaved Search - (11-30-2023) 👁 Andrew Cunsolo (ABC)	Scheduled	2871	2023/12/08 - 05:00AM 2023/12/12 - 05:00AM	0/2871	--%	--%	--%	--%	⋮
Unsaved Search - (11-27-2023) 👁 Andrew Cunsolo (ABC)	In Process	2931	2023/11/30 - 04:30AM 2023/12/06 - 04:30AM	1750/1181	59.7%	6.3%	0%	0%	⋮

...

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- Filter by *Status.* Additional status "Queued"

Filters   ×

Status   Clear ∧

☐ Pending

☑ Scheduled

☐ Completed

☐ Cancelled

☑ Suspended

☑ Paused

☑ Error

☑ In Process

☑ Queued

Close   Clear All   **Apply Filters**

- Preview Email related to the Mass Email, ability to expand to full browser tab

ABC Company is Hiring – {{Req.title}}   ⌞⌝ ×

Template: EVOLVE Invite to Apply   Campaign: N/A
Start Date: 2023/12/08 - 12:30PM   Scheduled By: Andrew Cunsolo (ABC) Created In: Search

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ABC Company is Hiring - {{Req.title}}

Dear {{Candidate.first_name}},

I wanted to drop you a line to introduce myself – I'm {{Recruiter.full_name}}, and my job here at ABC Company is hiring the talent we need to sustain our growth and make sure we continue to be the world's largest Talent Generation platform.

Talemetry is an industry leading, cloud-based software solution that provides recruiters with all the tools they need to find, attract & engage top talent. We wouldn't be industry leaders if it wasn't for our dedicated team that makes Talemetry what it is.

I came across your background and information and thought that your experience and expertise might align well with some of the opportunities available here at Talemetry.

We are currently hiring for a {{Req.title}} located in {{Req.location}}

We do our due diligence to find the best talent for the right roles, and know that if we're contacting you, you have choices, which is why we encourage you to check out our career site, follow us on Twitter @Talemetry or like us on Facebook.

I'd love the chance to learn a little bit more about you and your background and tell you more about Talemetry, our careers, and our culture to see if there's mutual interest in next steps for this role. If you're interested, let me know a few times you might be available and the best number to reach you; I'll confirm by sending you a calendar invite. Alternatively, you can also apply directly for the position here.

If you'd like to connect, or just have any questions, please don't hesitate to contact me directly at {{Recruiter.email}} or {{Recruiter.phone_number}}.

Look forward to connecting soon and thanks in advance for your time and consideration.

Close

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Enhanced User Experience for Mass SMS Page

- New List Page for Mass SMS

Mass SMS Management

Unless configured on the message, Talemetry does not schedule subsequent SMS batches to be sent on Saturdays and Sundays to maximize clickthrough rates.
Dates and times are in Eastern Time (US & Canada)

25 RESULTS | ☰ Filters

STATUS: SCHEDULED + 4 ⊗

NAME	STATUS	RECIPIENTS	START/END DATE	SENT/REMAINING	COMPLETE %	UNDELIVERED %	UNSUBSCRIBED %	
Talemetry Text - (10-25-2023) Andrew Cunsolo (ABC)	Error	5	2024/02/17 - 04:00AM ERROR	0/5	0%	0%	0%	
Irina 1:24pm Irina 3rdAdmin	Paused	3	2023/12/13 - 12:34PM PAUSED	0/3	0%	0%	0%	⋮
Deep test with harry- (6-14-2023) Pradeep Gorantla	Error	2	2023/06/14 - 01:56PM 2023/06/14 - 01:56PM	0/2	0%	0%	0%	
My SMS Test - (9-9-2022) Myadmin Abc_user	Error	2	2022/09/09 - 09:50AM 2022/09/09 - 09:50AM	0/2	0%	0%	0%	

- Filter by *Status*

Enhanced User Experience for Scheduled Emails Page

- New List Page for Scheduled Emails

Scheduled Emails

3 RESULTS | 🔍 Search by Subject | ☰ Filters | ☰ Sort By : Scheduled Date & Time | ↓

SUBJECT	LIST NAME	SCHEDULED DATE & TIME ↓	# RECIPIENTS	CREATED	UPDATED	
4494 👁 <acunsolo+abccompany@talemetry.com>	Unsaved Search Source	2024-01-23 - 08:31 PM Andrew Cunsolo (ABC)	1	2023-11-27 - 12:05 PM	2023-11-29 - 12:17 AM	⋮
bul-sarwat 👁 <acunsolo+abccompany@talemetry.com>	1aae Source	2023-12-28 - 01:00 AM Andrew Cunsolo (ABC)	1	2023-11-28 - 11:53 PM	2023-11-28 - 11:55 PM	⋮
ABC Company is Hiring - {{Req.title}} 👁 <acunsolo+abccompany@talemetry.com>	Unsaved Search Source	2023-12-08 - 03:00 PM Andrew Cunsolo (ABC)	1	2023-12-04 - 01:38 PM	2023-12-04 - 01:38 PM	⋮

1 TO 3 OF 3 | 50 Items ▼

- Filter by *Scheduled Date* and *Scheduled By*
- Sort by *Subject*, *Scheduled Date/Time*, *Created At*, and *Updated At ascending* or *descending*
- Added Pagination for Scheduled Emails
- Preview Email related to the Scheduled Email, ability to expand to full browser tab

CRM Improvements

Other CRM Enhancements

- (Enhancement) – All Resume Database Job board licenses for a deleted/disabled user are also deleted.

Other Enhancements and Fixes

Other

- (Enhancement) – Messages API – Added support for Tags in POST (AddMessages)
- (Enhancement) – Apply Workflow – Company Admin can configure Welcome Email for Employee Survey Workflow
- (Enhancement) – Career Site – Edit Site Info – Allow mapping group parameters when Apply is *OFF*
- (Fix) Candidate Portal – Referral Points label translation was missing on the Performance tab
- (Fix) Display issue from *From User* was showing blank, Referral Notifications were not sent
- (Fix) Apply Questions – parent_answer_value for Yes/No Question type was case sensitive and caused the Edit Conditional Question config UI to not render the child question
- (Fix) Referrals – Gamification – An error page was displayed when trying to edit Gamification settings
- (Fix) Job Feed – Generic XML – Was failing to index job when Apply URL contained an underscore
- (Fix) Apply Workflow – Branding – Unexpected changes were happening when applying branding primary color

Integrations

Recruitment Marketing Job Board Integrations

No new Job Board Integrations happened in December.

Recruitment Marketing Integrations

No new RM Integrations happened in December.

Evolve ATS Integrations

No new ATS Integrations happened in December.

Evolve ATS Partner Integrations

No new Partner Integrations happened in December.

Analytics

Auto Broadcast Summary Report in Looker

The CRM reports in the *Reports* tab were outdated and were running off different data models than Analytics.

What Changed

Now, the **Auto Broadcast Summary Dashboard** has been re-created in the Jobs folder in Looker so it runs off of current data models with an updated look and feel. This report displays:

- What Job Broadcast (Job Distribution) activity has been occurring automatically on a job in my company?
- Which Job Boards am I using for auto-broadcast, and what are the activities?

My Jobs Filter to CRM Reports

Certain in-app CRM reports were able to be filtered by *My Jobs* filtering results to either jobs tied to the user or all jobs. The filters were not present in the Analytics model.

What Changed

The *My Jobs* filter has now been added to the following reports:

- Email Pipeline
- Auto Broadcast Summary
- Job Pipeline Report
- Source to Job Report
- Source Activity Dashboard

Value

This filter was recreated to provide more filters for data so users can see more precisely which jobs are tied to them in the CRM and which are not.

Other Enhancements and Updates

- (Fix) ZCIS Report – The *Date* filter was not applied to six tiles in the ZCIS Performance Report. The tiles that will now be affected by the *Date* filter are Applications, Hires, Processed Jobs, Emails Delivered per Application, Average Days to Hire, and Processed Jobs with Email.

Looker Release Notes

There have been a few functionality updates in Looker recently that customers have asked questions about and were looking for documentation on.

The Looker Release Notes are now available.