EVOLVE

TALENT ACQUISITION SUITE

Release Notes

March 2024

Table of Contents

Overview

Release Date

The Evolve Applicant Tracking System (ATS) and Recruitment Marketing (RM) Releases are scheduled during the maintenance window on Wednesday, April 10th. No major downtime is anticipated during the release process. Still, there may be minor interruptions to service as system components 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 for 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

Talent Acquisition Suite

ATS & Onboarding

Multiple Organizations and Data Segmentation (Early Access)

We heard from customers that there were certain areas of improvement in Evolve ATS in managing the organizations and creating data segmentations, such as the following:

- Inability to manage roles and permissions in large organizations
- Lack of ability to create and manage hierarchies and structures of the organization
- Inability to control privacy and confidentiality of recruitment data
- Inability to create organization-wide reports and KPIs

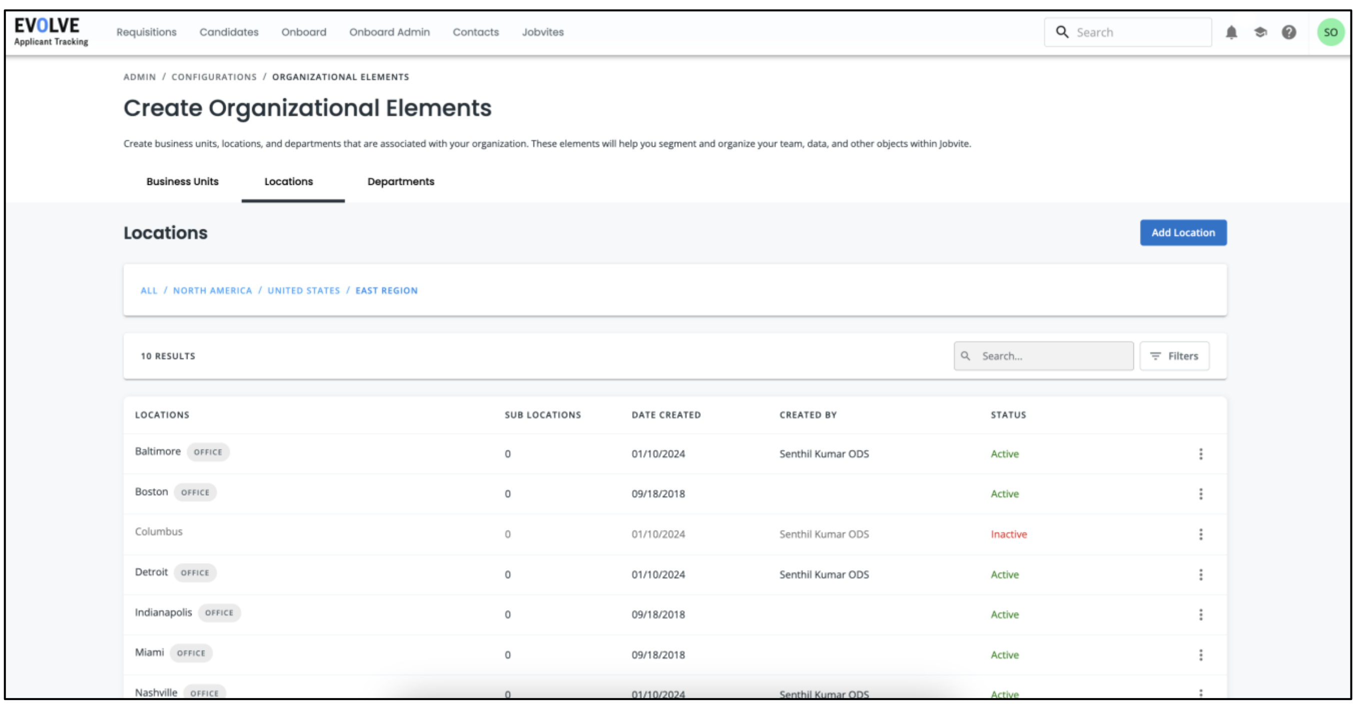
What Changed

The **Multiple Organizations** and **Data Segmentation** features allow customers to control the visibility and accessibility of crucial recruitment data - requisitions, candidates, and offers by Business Units, Locations, and Departments.

Admin users can create and manage these key organizational elements (Business Units, Locations, and Departments). Using these organizational elements and their hierarchies, the admin user can define the recruitment access levels for each user. Through these access groups, the admin can control the information a recruiter/hiring manager can view when they log into Evolve ATS.

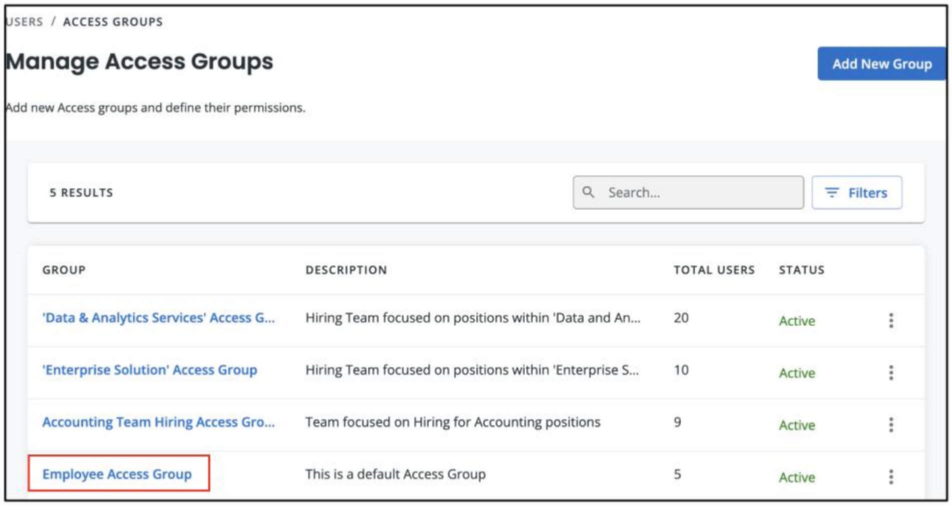
Manage Organizational Elements

- Through the newly named Organizational Elements, the admin user can create, edit, and manage hierarchies of the critical organization elements such as Business Units (subsidiaries), Locations, and Departments.



<u>Access Groups</u>

- The HR user can create various access groups and define the access levels to the Business Units, Locations, and Departments through the new user section named Access Groups.
- HR users can also add/remove users from the access groups.
- Users can also be added to access groups through *user addition* or *user update* in the Employee List.



<u>Access Restrictions</u>

- Based on the access group a user belongs to, the recruitment data such as Requisitions, Candidates, Offers, and Reports will only display the relevant data. The users can create requisitions only to the Business Unit, Location, and Departments they can access.

Value

- **Improved Usability** – Create and manage organizational elements such as Business Units, Locations, and Departments. Create hierarchies within the organization.
- **Improved Performance** – Aggregate and segregate data and reporting of crucial recruitment metrics.
- **Expanded Capabilities** – Create Access groups and segment the recruitment data within the organization so recruiters and hiring managers can only view their relevant data.

Resources

- <u>Multiple Organizations and Data Segmentation</u> article in the Help Center

Requisition Template Mapping (Early Access)

We heard from our customers that there are certain areas of improvement in Evolve ATS while creating requisitions and managing requisition templates, such as:

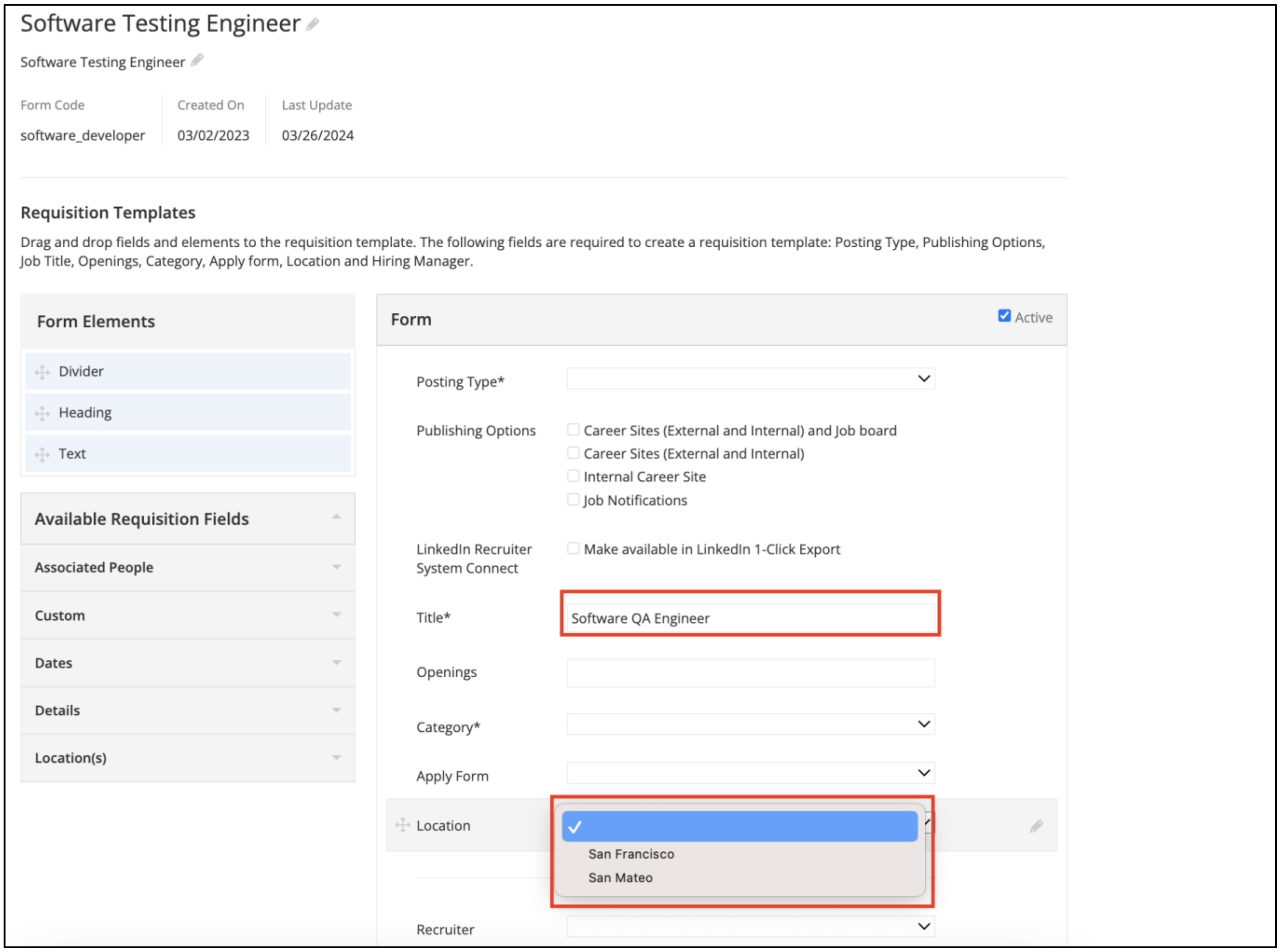
- Lack of ability to save values for requisition fields in Requisition Templates
- Increased time and effort to create new requisitions
- Lack of ability for the admin user to control the data captured during requisition creation

What Changed

The **Requisition Templates Value Mapping** feature allows admin users to predefine values for the requisition fields. This feature will auto-populate values for these fields when requisition creators attempt to create a requisition using the requisition templates.

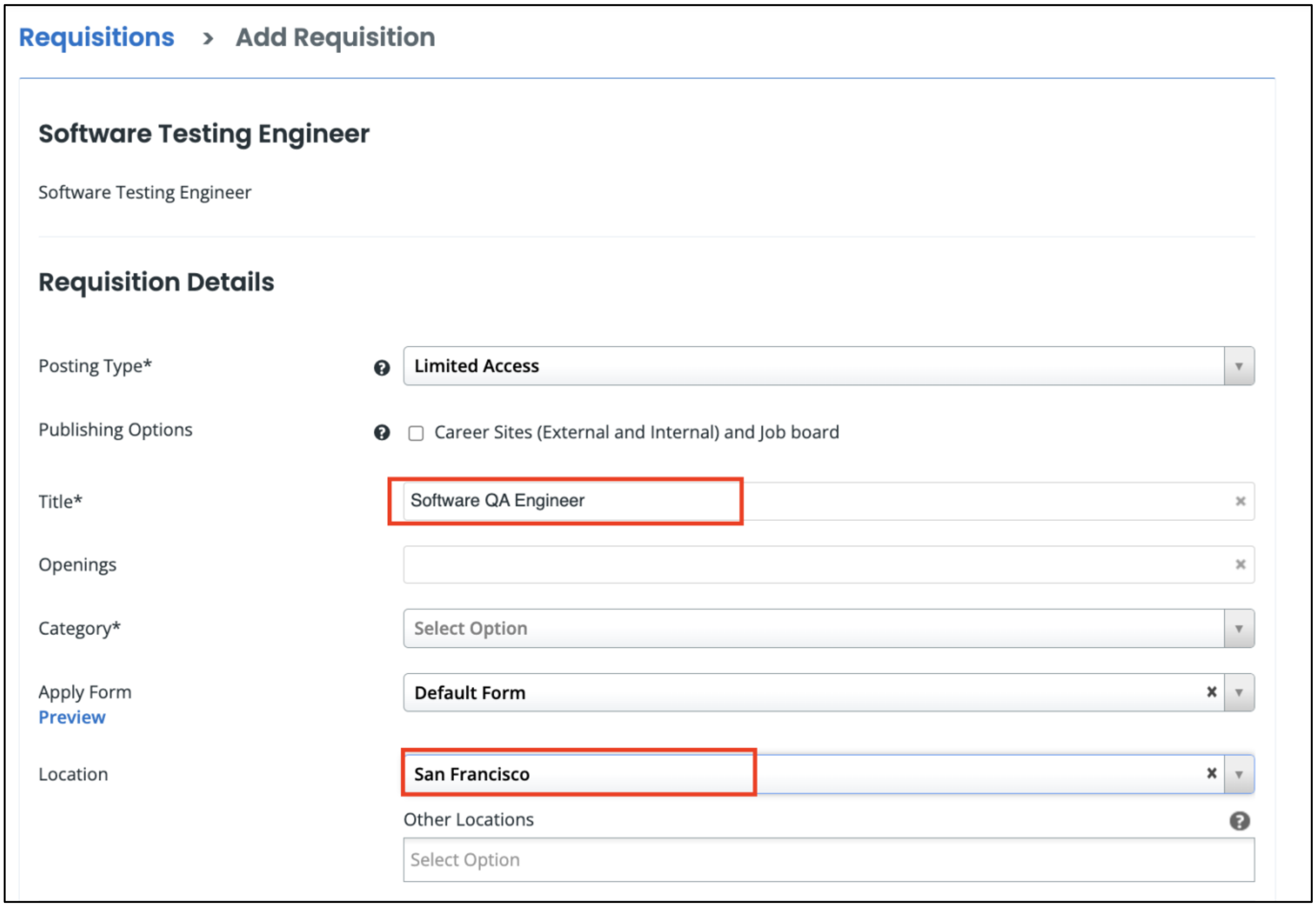
Predefined Values for Standard and Custom Fields

- The admin user can predefine a requisition template's standard and custom field values. The admin user can value map the field regardless of the field type: dropdown, checkboxes, radio buttons, text, multi-line text, number, zip, phone number, currency, dollar amount, date, description, employee and employee (default).



Auto-populating Field Values

- Once a requisition creator uses a value-mapped requisition template, the value-mapped fields will automatically be populated for quick, easy creation of requisitions.



Value

- **Improved Usability** – Reduce and eliminate manual errors in requisition creation, as fields can be auto-filled while creating requisitions.
- **Improved Performance** – Reduce the time and effort of requisition creation by auto-filling the requisition fields.
- **Expanded Capabilities** – Ability to predefine requisition values of the fields available in requisition templates.

Resources

- Requisition Template Value Mapping article in the Help Center

Recruitment Marketing

Campaign Landing Page (Early Access)

When a recruiter wants to create a landing page for a campaign, they need to go to the Career Sites and create a page or engage with someone in their Marketing department. This can cause delays in their campaigns. Allowing a recruiter to do this at the time they are creating a campaign and not requiring HTML and other skills is key to making a campaign successful.

What Changed

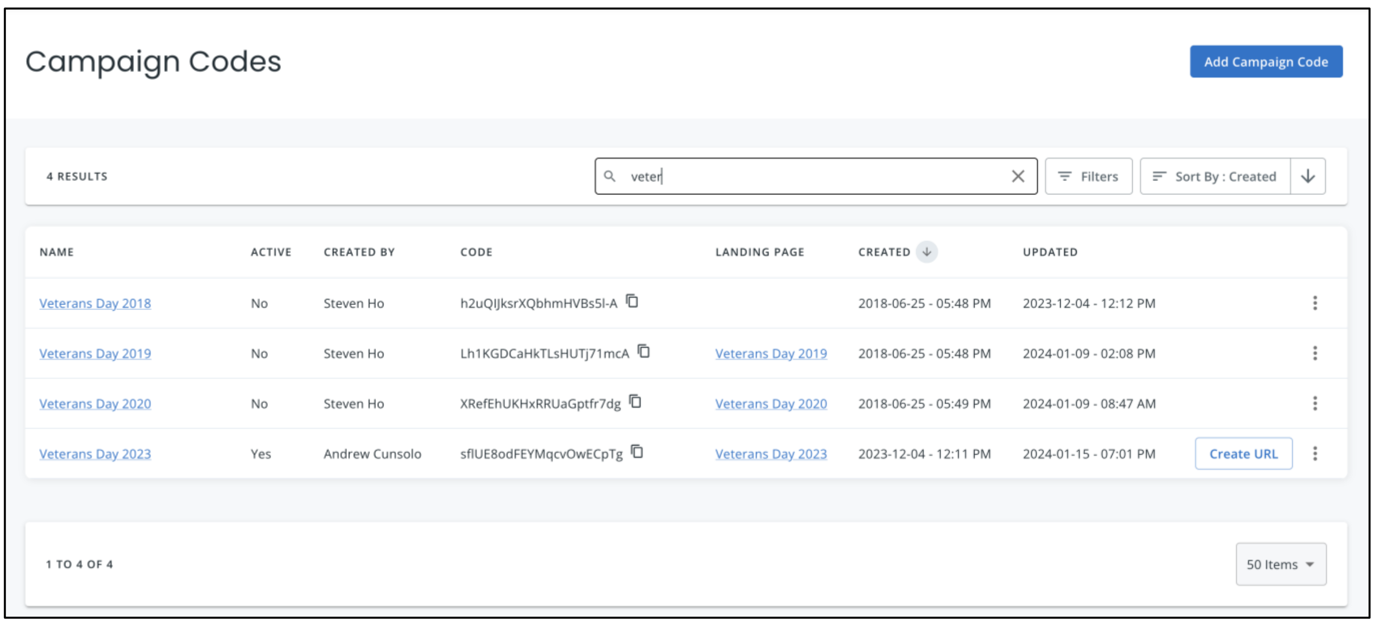
The **Campaign Landing Page** feature has been added, which includes new privileges, a new user experience of seeing the assigned campaign landing pages, assigning a landing page to a campaign, creating a landing page, and using the landing page in communication.

<u>Privileges</u>

- A new privilege can be assigned to the user role to *Manage Campaign Landing Pages* and/or *Assign Landing Pages*.
- Existing career site admins or content editors can manage landing pages.
- Existing Campaign Admins can assign landing pages.

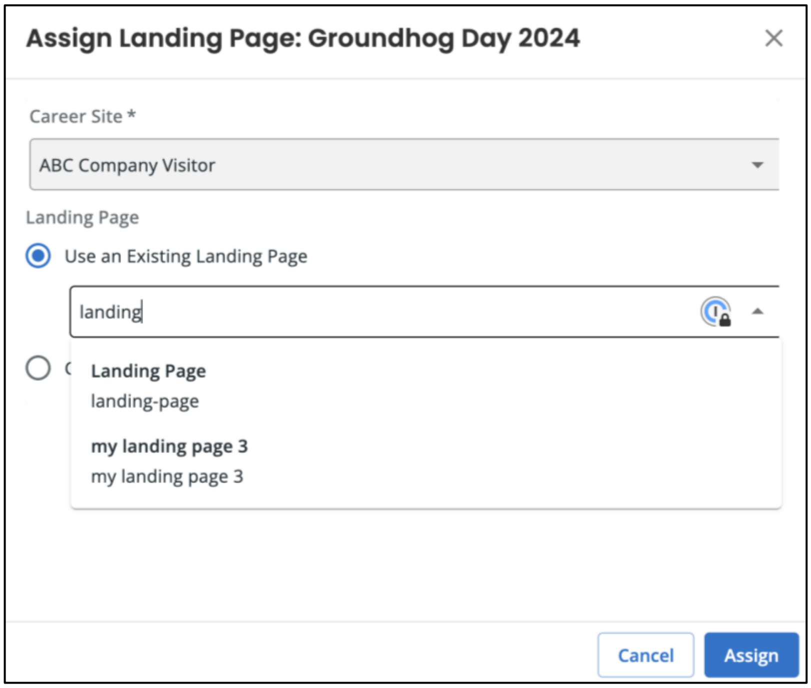
<u>Campaign Codes List</u>

- A new column for *Campaign Landing Page* has been added with a URL to preview the page in the career site (if assigned) and is launched in a new browser tab.
- New actions to *Assign/Reassign Landing Page, Edit Landing Page,* and *Preview Landing Page*.



<u>Assign Landing Page</u>

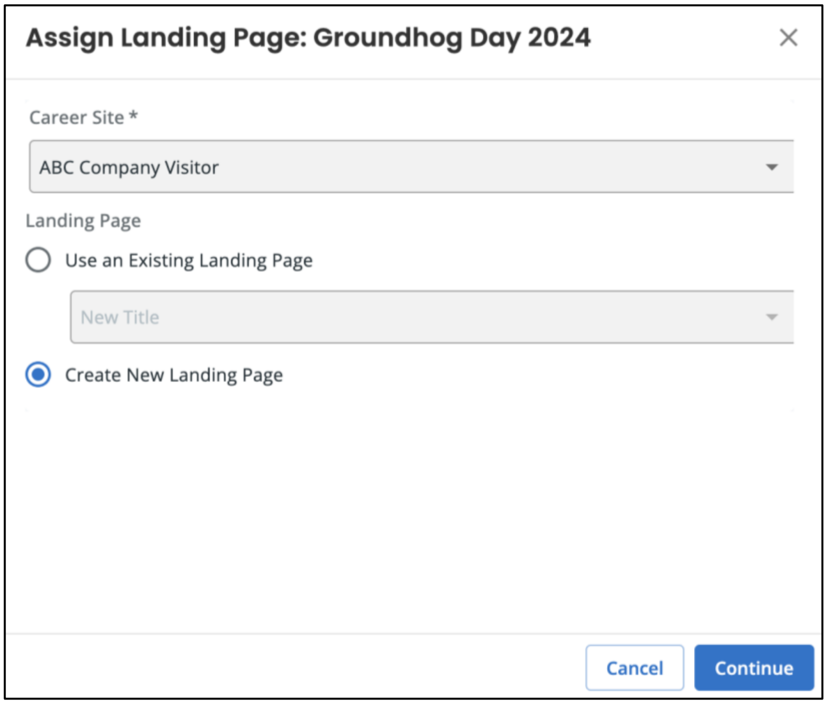
- Users can choose a career site and an existing landing page to assign to a campaign.
- Users can reassign a landing page to a campaign once assigned.

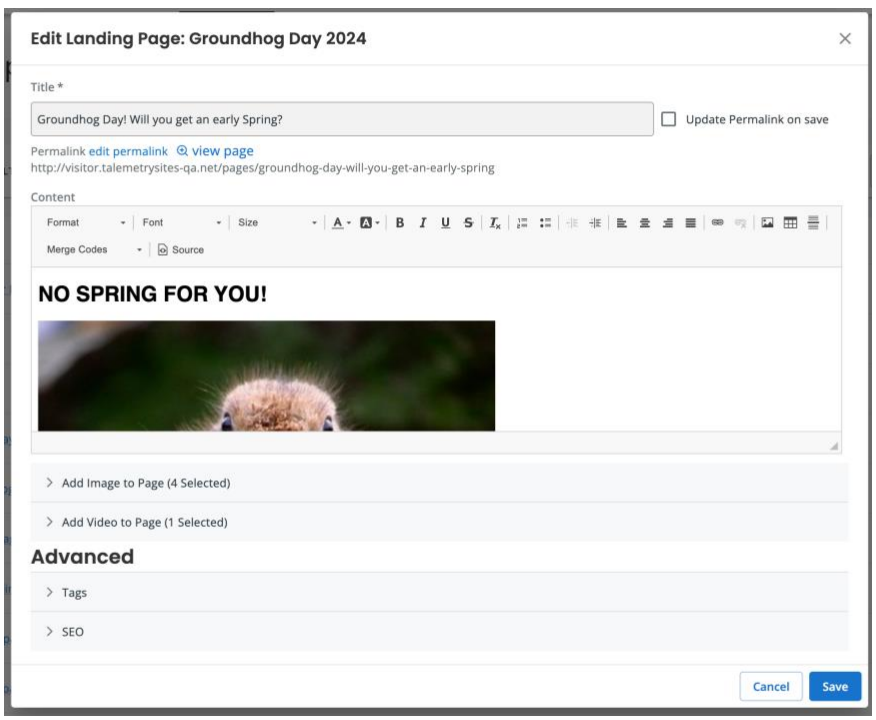


<u>Create Landing Page</u>

A user can first choose a career site and then create a new landing page in that career site:

- Add the Title, Body (with simple HTML styling), Tags (to drive behavior in the career site template – customer specific), and SEO.
- Assign images or videos to the page. Those images and videos are rendered based on the career site template.
- Quickly see attached images or videos.





<u>Using Landing Page in Communication</u>

- A user can select a new merge code, *Campaign Landing Page*, when sending Email, Mass Email, Email Campaign, SMS, or Mass SMS.
  - Requires the selection of the campaign with the landing page.
  - When an email or text is sent, the campaign landing page is resolved (with all campaign and source tracking) and sent to the candidate.

Value

- **Improved Usability** – Users don't need to be career website developers or technical experts to create simple landing pages with a rich theme for a career site.
- **Improved Performance** – Quickly create a landing page when creating a campaign—no need to wait for the Web Marketing team to create pages in a career site.
- **Expanded Capabilities** – Recruiters/Marketers/Sourcers can easily create the landing page for their campaign along with the campaign—no need to understand the Career Sites theme/pages.

CRM Improvements

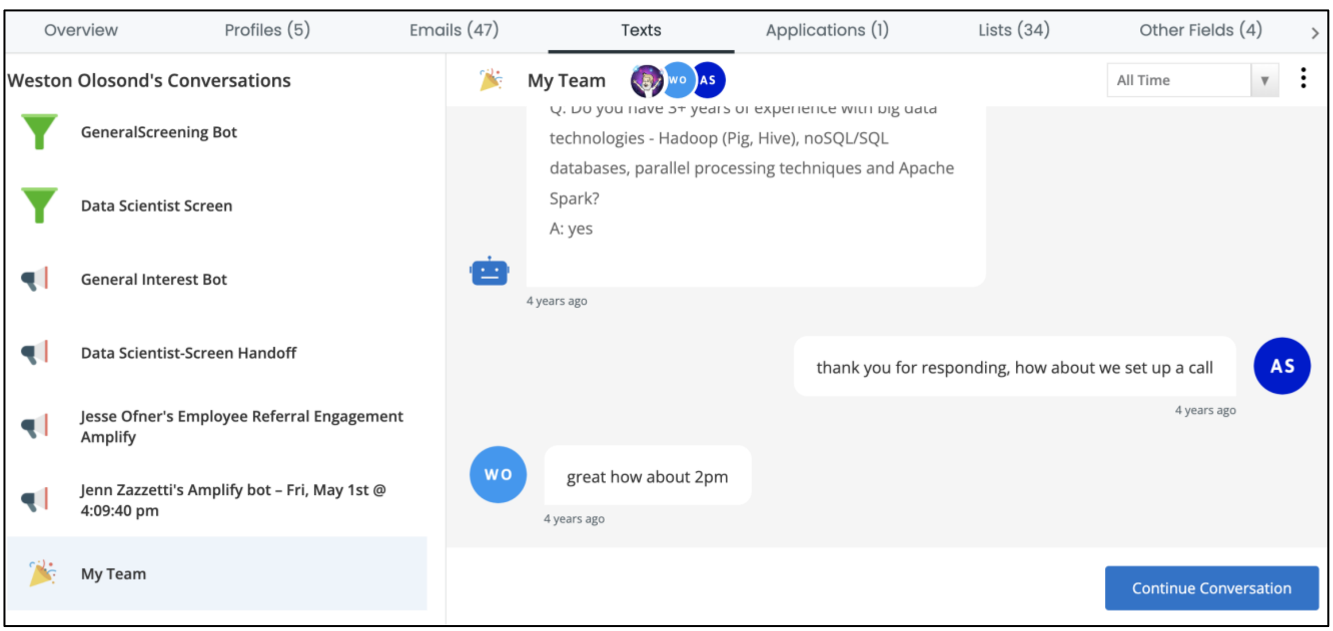
Use Employee Work Email for Candidate with Current Employee Lifecycle (Enhancement)

- A new feature switch will be used to determine the primary email of an employee candidate's logic.
    - Current Employee > Use work email as the default
    - Non-employee > Use personal email as the default

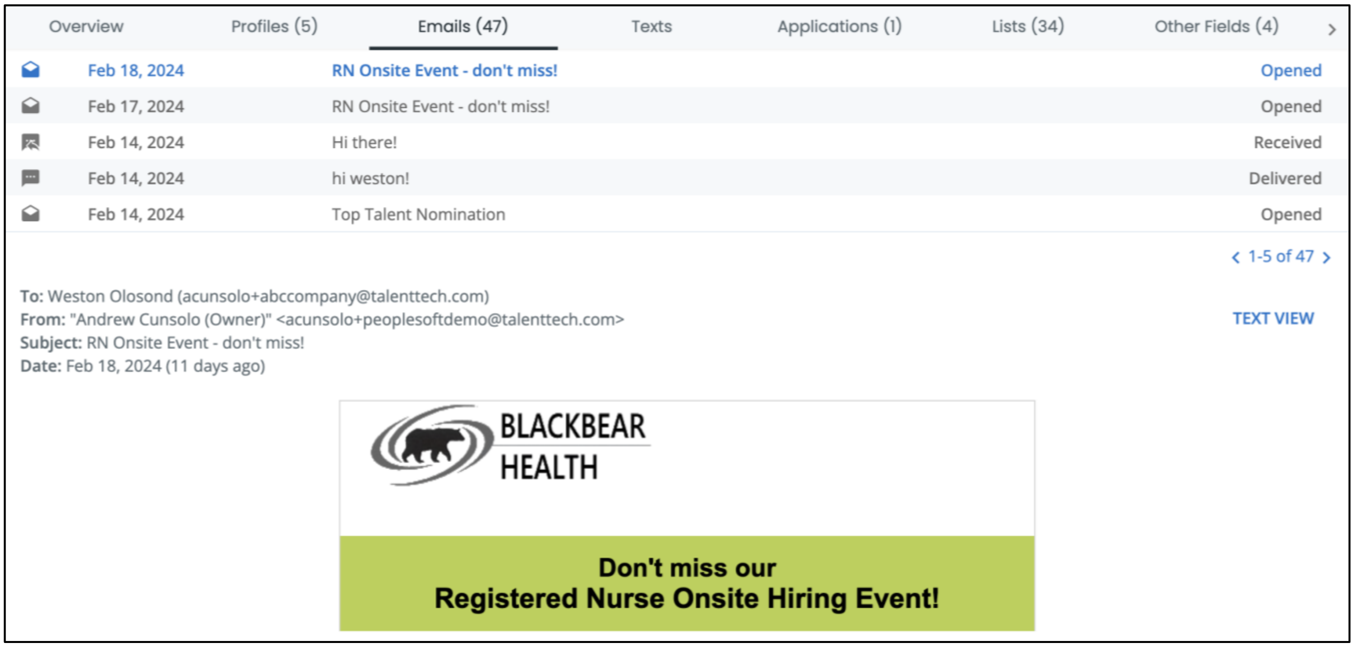
  NOTE: This feature requires that the customer has employees with both work email and personal emails in CRM. This may require additional implementation steps for some customers.

Text Tab on Profile (Enhancement)

- When a company has Intelligent Messaging enabled, a new tab called *Texts* will display on the profile.
- Users with Intelligent Messaging permissions can see the *Texts* tab.
- The Texts tab shows all conversations between individual recruiters, teams, keyword bots, or amplify (text drip marketing) bots and the candidate.
- Conversations are displayed in the thread.
- Continue Conversation control is available in messaging threads with teams or users to launch the Intelligent Messaging widget.



- The *Messages* tab is named *Emails* when a Company has Intelligent Messaging enabled.



Other Enhancements and Fixes

- (Enhancement) When a candidate creates a Job Notification, their email address is removed from the *Unsubscribed* list.

Other Enhancements and Fixes

Other

- (Fix) Jobs – Routing of Career Site > Job List link was being directed to the old UX. Now, it will navigate to the new Jobs List.
- (Fix) Referrals – Notifications from users appeared not selected/blank in some situations with long lists of users.
- (Fix) Apply – Text to Apply Issues resolved:
  - A duplicate referral record was being created.
  - Job/General Referrals were without a career site ID.
- (Fix) Apply – Applications with a blank field on the required date question were allowed to continue.
- (Fix) Apply – Previous Application – No resume attachment if the apply standard naming feature was off.

Integrations

Recruitment Marketing Job Board Integrations

No new Job Board Integrations happened in March.

Recruitment Marketing Integrations

No new RM Integrations happened in March.

Evolve ATS Integrations

No new ATS Integrations happened in March.

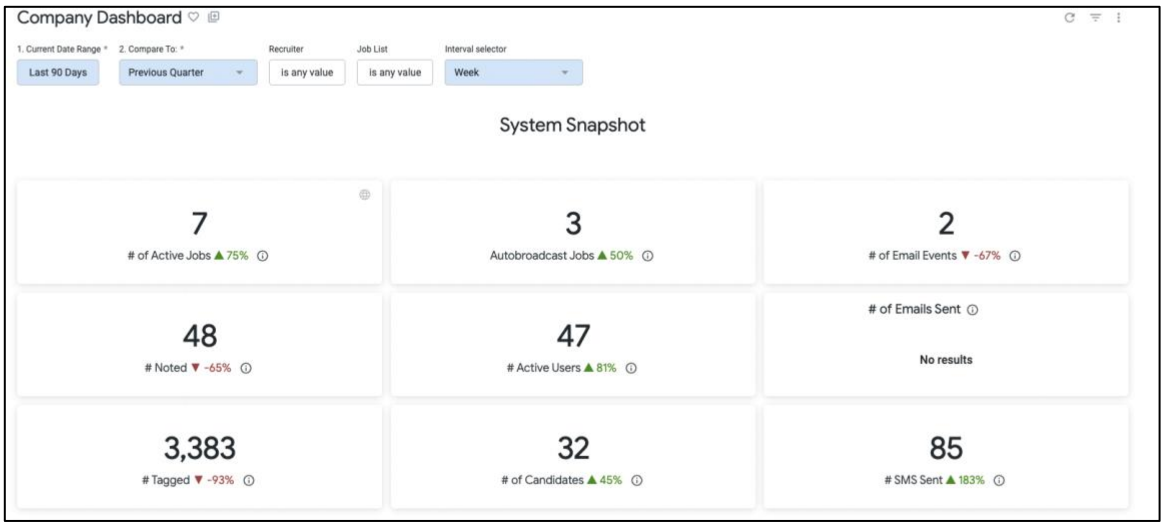
Evolve ATS Partner Integrations

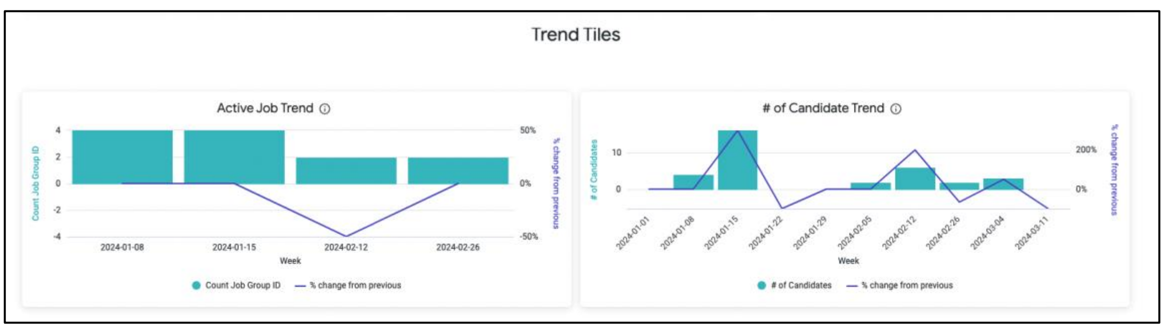
No new ATS Integrations happened in March.

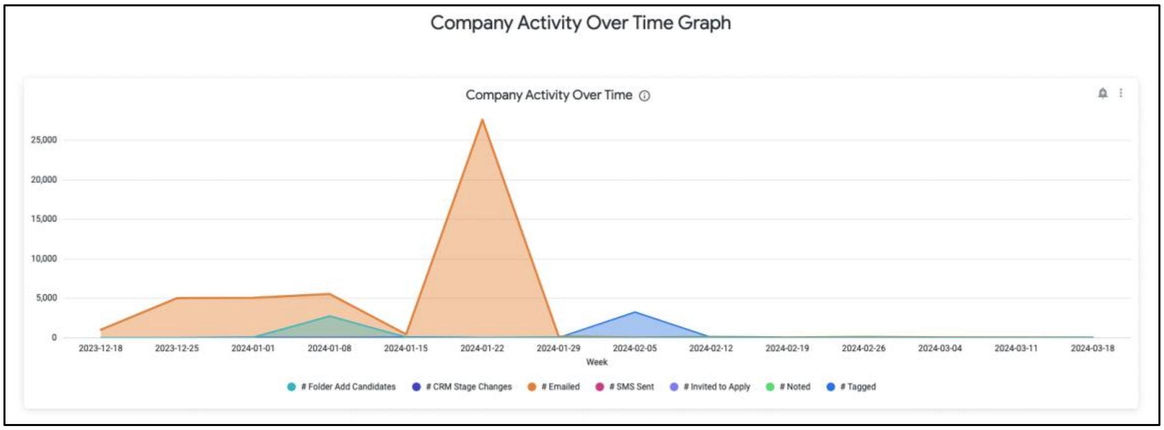
Analytics

CRM Company Dashboard in Analytics

The in-app Recruitment Marketing homepages have been built on the Analytics platforms so that the reports can be accessed via Analytics today and embedded reporting in the future. This is being released ahead of embedding it into the CRM to give customers a chance to see the dashboard and get comfortable using it.







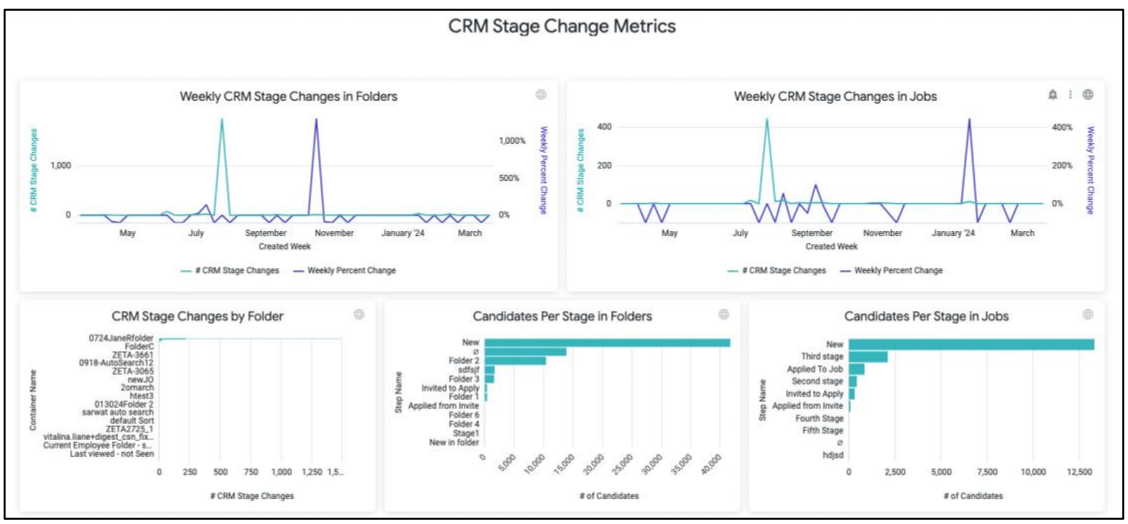
Value

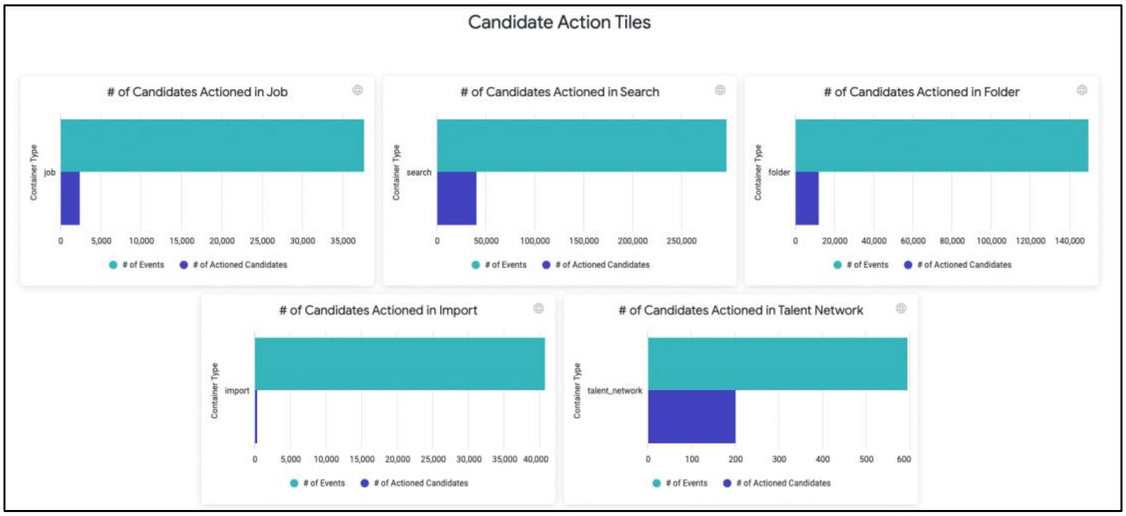
Transitioning these reports to be built inside Analytics will provide greater transparency, improved consistency, and better support for Recruitment Marketing reporting. There will no longer be data discrepancies between metrics in Analytics of the CRM because they will be built on the same updated data logic.

CRM Recruiter and Team Dashboard in Analytics

The in-app Recruitment Marketing homepages have been built in the Analytics platforms so that the dashboards can be accessed via Analytics today and embedded reporting in the future.

The **Recruiter and Team dashboards** are now one dashboard that can be filtered by either a recruiter or a team in Analytics. This is being released ahead of embedding it into the CRM to give customers a chance to see the dashboard and get comfortable using it.





Value

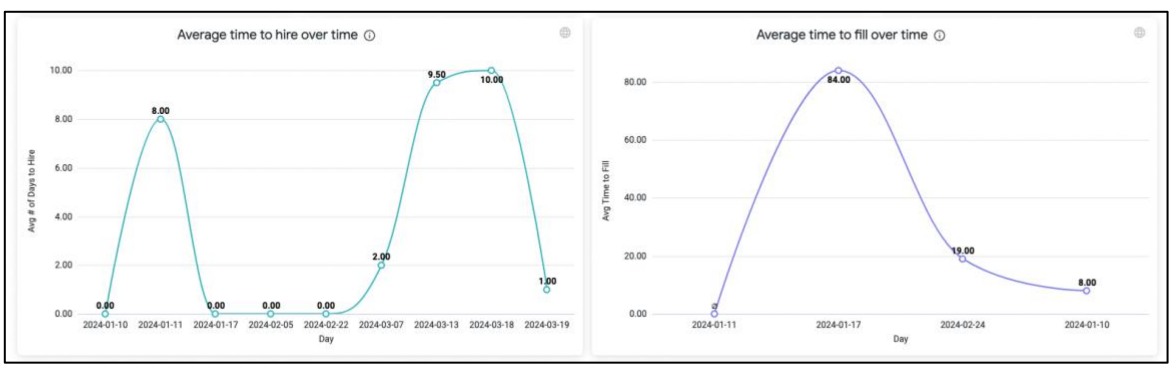
Transitioning these reports to be built inside Analytics will provide greater transparency, improved consistency, and better support for Recruitment Marketing reporting. There will no longer be data discrepancies between metrics in Analytics of the CRM because they will be built on the same updated data logic.

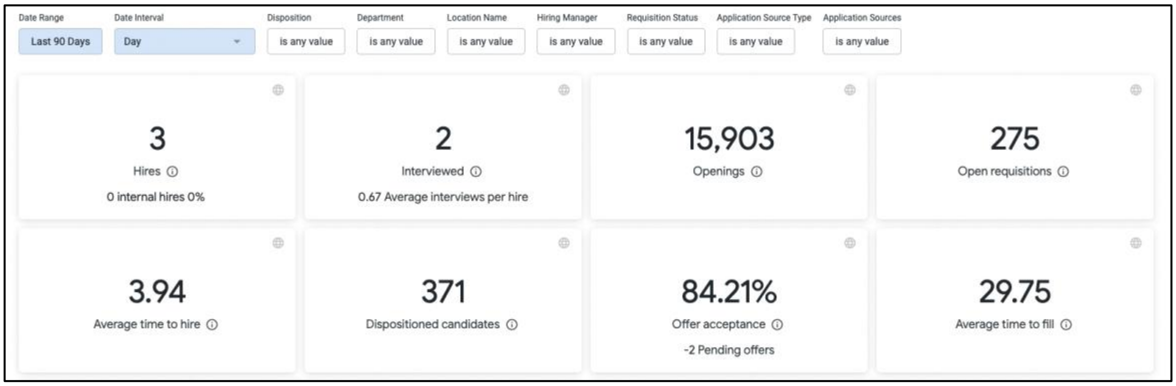
Talent Leader Summary Dashboard

The Talent Leader Summary dashboard provides a worthwhile opportunity to examine the overarching successes and bottlenecks of a customer's hiring practices across the recruiting funnel; however, this has only been available for Lever customers.

What Changed

The Talent Leader Summary dashboard allows all customers to analyze high-level performance KPIs measuring the success across your recruitment process. It helps identify opportunities to optimize your team's talent recruiting strategies and methods based on trends in average time-to-hire, requisition volume, and opportunity inventory to streamline your recruitment practices.





Value

This dashboard will provide all customers with actionable insights that empower them to have more effective processes.