

# **EVOLVE**

## **TALENT ACQUISITION SUITE**

### **Release Notes**

*May 2024*



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, June 5<sup>th</sup>. 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

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# ATS & Onboarding

## Candidate Email / SMS Messages (Early Access)

Recruiters face challenges in effectively engaging candidates via email, including low response rates, lack of personalization, and potential brand misalignment. This results in a negative impact on the recruitment process and diminishes the candidate experience.

### What Changed

Recruiters will now have the ability to send the following message types to candidates via SMS (text message) or email:

- Messages to Candidates
- Messages to Candidate – General Application
- Request Candidate Availability
- Invite Candidate Self-Schedule

Invitation to candidate to provide availability

---

**Add Template Fields**

Available Template Fields  
Drag the field to the message body

[availability-link]

[candidate-first-name]

[candidate-last-name]

[candidate-name-and-email]

[candidate-source]

[company-name]

[interview-total-duration]

[job-company-name]

[job-title]

[link]

[requested-interview-timeslots]

[requisition-id]

[sender-email]

[sender-first-name]

[sender-last-name]

[sender-phone]

[sender-signature]

[sender-title]

[workflow-state-name]

**Template Editor** Language Type: English (United States) Delete Translation

Template Name\*

---

Subject

---

Email Message

Hello [candidate-first-name],

Congratulations! We would like to schedule you for a(n) [workflow-state-name] interview with [job-company-name]. You will be interviewing for the [job-title] position.

Please allow a total of [interview-total-duration] minutes for the entire interview process.

Please click the link below to provide your availability:  
[availability-link]

Sincerely,  
[sender-signature]  
[job-company-name]

...Original Template...

---

SMS Message

[candidate-first-name],

Congratulations! We would like to schedule you for a(n) [workflow-state-name] interview with [job-company-name]. You will be interviewing for the [job-title] position.

Please click the link below to provide your availability:  
[availability-link]

Sincerely,  
[sender-first-name] [sender-last-name]

**Send Message**

Delivery Method  SMS (Text Message)  Email

From Phone Number

To 9047106994

Template SMS Message to Candidate - Interview Avail... x

Allison,  
Congratulations! We would like to proceed with the interview process.  
Please provide your availability for an in-person interview with the Hiring manager for this position. The in-person interview will last between 60-90 minutes.  
Best regards,  
Michael Carrino

Cancel Send

## Value

By sending text messages to candidates, recruiters can improve communication efficiency, increase response rates, foster personalized interactions, and create a more seamless candidate experience.

## Prerequisites

The SMS option will only be available to a customer if:

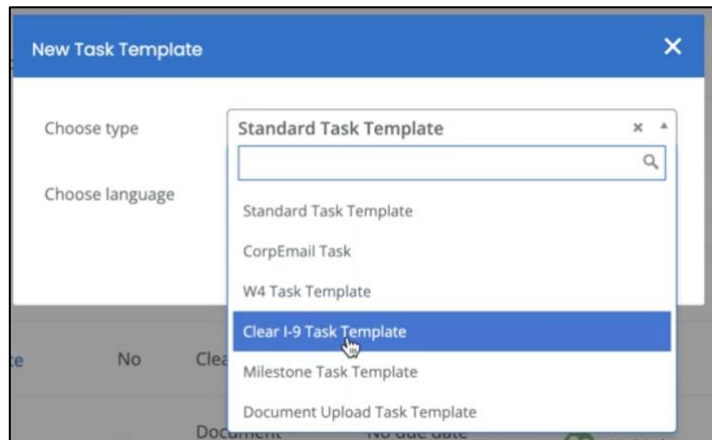
- The customer is subscribed to Intelligent Messaging
- The recruiter has either an assigned number or a shared number
- The candidate provided SMS consent

## Clear I-9 Integration with Onboard

Clear I-9 offers reliable, compliant, and streamlined I-9 solutions for employers. This integration enables customers to process new hires' I-9 forms (Employment eligibility verification form) through our partner Clear I-9.

## What Changed

- In addition to existing I-9 partner (Equifax/I-9 Advantage) and native I-9 solution, we have enriched the I-9 capability by partnering with Clear I-9.
- Net new and existing customers using native solutions can integrate with the Clear I-9 system to fulfill their new hire's onboarding requirement.
- Customers who opt for Clear I-9 will have a direct connection with the Clear I-9 system while we facilitate the collaboration.
- A new task type, *Clear I-9 Task Template*, has been added, which can be used to create and assign a task to new hires.
- Seamless transition between Evolve ATS and Clear I-9 system to complete the I-9 form.



Form I-9 - Section 1

**Introduction**

**Name and Address**

**Name Information**

Last Name (Family Name)  Max: 256 chars, Min: 2 chars \* Last Name is a required field. First Name (Given Name)  Max: 256 chars, Min: 2 chars \* Middle Initial (Must provide if you have)  Max: 256 chars, Min: 2 chars \* Other Last Names Used (if any)  Max: 256 chars, Min: 2 chars \*

**Address Information**

Address (Street Number and Name)  Max: 256 chars, Min: 2 chars \* Apt. Number (if any)  Max: 256 chars, Min: 2 chars \*

City or Town  Max: 64 chars, Min: 2 chars \* State  Max: 256 chars, Min: 2 chars \* ZIP Code  Max: 15 chars, Min: 5 chars \*

## Recruitment Marketing

### Jobs User Experience Improvements

#### Candidate Count on Jobs (Enhancement)

- Sourcer can easily find similar filled/past/archived jobs and engage past applicants.
- Sourcer can see Candidate Count on a Job List (card or table view)
- Sourcer can sort by Candidate Count
  - Default is descending
- Whenever a new candidate is added to a job (from ATS Apply, sourcer activity, auto-search, Agency ZCIS), the candidate count on the job is updated.
- Sourcer can search jobs by the Candidate Count
  - Choose a minimum value, maximum value, or both.
  - Enter a number or increment up or down.
  - Returns a list of jobs that have between the minimum and maximum candidate count values.

#### Other

- (Enhancement) When a company or user cannot access CRM, the *Candidates* tab will now be hidden.
- (Fix) Some user roles were previously unable to **Unbroadcast Job** in the New Jobs UX.
- (Fix) Unable to **Add Job** in the New Jobs UX for non-admin users.

## Campaign Usability Improvements

### Enhanced User Experience for Email Template Pages (Enhancement)

- Includes Campaign Templates, Portal Templates, Referral Templates, Agency Templates.
- New *list* page for Email Templates.
- Search for Email Templates by Name, Subject, or Created by.
- Filter by Created by, Published, Locale, or Career Site.
- Sort by Template Name, Subject, Created by, and Locale ascending or descending.
- Preview the Email Template from the *list* page.

The screenshot shows a 'Filters' panel with a close button (X) in the top right corner. It contains four filter sections, each with an expand/collapse arrow (^) on the right:

- Created By:** A search input field with the placeholder text 'Search By Name or Email' and a dropdown arrow.
- Published:** Two radio button options: 'Yes' and 'No'.
- Locale:** A dropdown menu with the label 'Locale' above it.
- Careersite:** A dropdown menu with the label 'Careersite' above it.

At the bottom of the panel are three buttons: 'Close', 'Clear All', and 'Apply Filters'.

### Enhanced User Experience for SMS Template Pages (Enhancement)

- New *list* page for SMS Templates.
- Search for SMS Templates by Name, Keyword, or Created by.
- Sort by Template Name, Keyword, Created by, and Locale. Ascending or descending order.
- Preview SMS Templates from the *list* page.

SMS Templates Add New Template

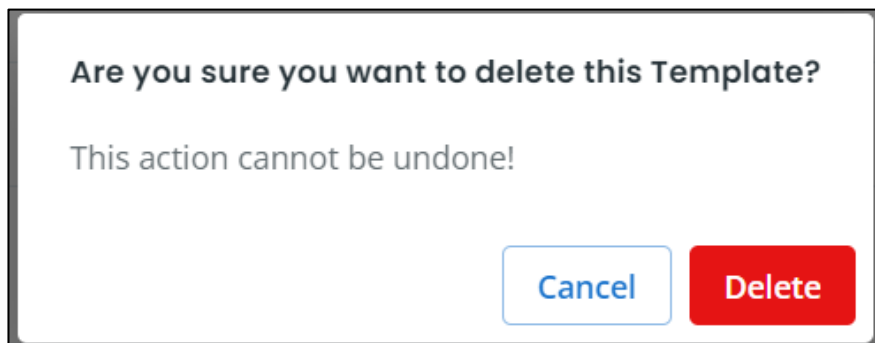
6 RESULTS Search by: Template Name or Keyword or Created By Filters Sort By: Keyword ↑

TEMPLATE NAME	KEYWORD ↑	CAREERSITE	CREATED BY	PUBLISHED	LOCALE
US STOP Compliance Template	CANCEL;END;QUIT;STOP;STOPALL;UNSUBSCRIBE;ARRET		Services	Yes	⋮
US HELP Compliance Template	HELP;INFO		Services	Yes	⋮
For potential candidates	potato		Services	Yes	⋮
US START Compliance Template	START;SUBSCRIBE;UNSTOP		Services	Yes	⋮
UNCONFIRMED	unconfirmed		Andrew Cunsolo (ABC)	Yes	⋮
YES Template	yes		Andrew Cunsolo (ABC)	Yes	⋮

1 TO 6 OF 6 50 Items ▾

## Other

- (Enhancement) Delete Template - Improved Confirmation dialog box.



- (Enhancement) User will now not be able to delete templates used in Apply Workflow (Continue Later, Welcome Email, Reminder to Apply)
- (Fix) Users could not create a URL/link when editing a campaign landing page.

## CRM Improvements

### Engagement Score (Enhancement)

- External Job application added to the candidate's Engagement Score.
  - Examples of external applications: Job application happens in ATS only, or a candidate is added to another job in ATS by a recruiter.

## Other

- (Fix) Updated Desktop Tools page content.
  - Added a new link to the help article.



# EVOLVE

## Talent Acquisition Suite

- Removed Internet Explorer download.
- (Fix) Upload to ATS with Job was not working properly.

## Other Enhancements and Fixes

### Apply Workflow (Fix)

- When using *Build my Resume* and adding Work History or Education, the Month was deleted if you edited.

## Integrations

### Recruitment Marketing Job Board Integrations

*No new Job Board Integrations happened in May.*

### Recruitment Marketing Integrations

*No new RM Integrations happened in May.*

### Evolve ATS Integrations

*No new ATS Integrations happened in May.*

### Evolve ATS Partner Integrations

*No new ATS Integrations happened in May.*

## Analytics

### Randomize Report Schedules

Currently, scheduled reports in Analytics are sent at 6:00 AM (local time) by default. When too many reports run at once, some schedules may time out, which results in emails sent with blank reports attached. We understand the frustration this may cause, so we're making improvements to address this issue.

#### What Changed

A change will occur to spread out the timing of scheduled reports. Any report scheduled at the default 6:00 AM (user's local time) will be randomly distributed between 5:05 AM and 5:55 AM (user's time zone). Distributing the report generation times more evenly throughout the new times will prevent report timeouts.

#### Value

This adjustment will enhance system reliability and ensure that your scheduled reports are delivered promptly and without interruptions.

## RM Candidate Source Reports

The Candidates Report has resided solely within the Recruitment Marketing (RM) module and was built off an application database, utilizing outdated data logic and design standards.

### What Changed

A newly designed report, Candidate Source Report, will offer valuable insights by addressing key questions related to the RM candidate pool. These include determining the unique candidates within Evolve RM and identifying their primary sources.

Additionally, the report helps track the growth rate of candidate additions to RM and pinpoint areas of concentrated growth, providing essential data for strategic decision-making and resource allocation within the organization.

### Value

The report enables further efficiency for data analysis. Through accurate metrics on candidate counts and growth rates, coupled with detailed analysis of emerging trends and sources, we enable customers to optimize recruitment strategies, allocate resources purposefully, and foster continuous improvement.

## Invite to Apply Email to Hire Conversion Report and Email Hire Conversion Report

The previous *Invite to Apply Email to Hire Conversion* report did not refine the results only to Invite to Apply emails, which caused confusion.

### What Changed

A new **Invite to Apply Email to Hire Conversion** report has been created, where the *Email Type* filter on the dashboard has been refined to specifically display *Invited to Apply* emails, ensuring accurate reporting and insights.

To maintain consistency and prevent disruptions to scheduled reports, the existing report has been renamed **Email to Hire Conversion** to accurately represent what it is measuring.

This adjustment will not affect any existing schedules or data.

### Value

Users utilizing the existing reports will only experience a name change on the dashboard. This ensures uninterrupted access to critical insights, data, and scheduled reports. This enhancement aims to improve user experience and provide more accurate reporting capabilities.