

Visma EasyCruit release notes

November 2023

New interview booking workflow (16th of November 2023)

Purpose and scope

We've rebuilt the interview booking workflow and the corresponding email templates. This will also be the basis for the upcoming calendar integration and new email templates. This new functionality has been tested by a few customers and some of their feedback has already been processed for this release.

Description

This rebuild marks the next chapter of our EasyCruit new platform. We've taken parts of the old interview booking functionality and improved on that based on customer feedback. The new templates are the first of many to come, with new and improved design and functionalities.

The new interview booking workflow opens in a modal window. In the first step you have to enter the interview details. Some important changes that we've implemented there:

- You can select internal interviewers from the complete user list.
- You can also add external interviewers, so they don't have to be added as a user in EasyCruit.
- You can add either an on-site location (saved address directory) or choose "Online".

Right now, you can select a date and time as you're used to. In the next version, we'll add a calendar integration to the first step. You'll then be able to select time slots that are available in the email calendars of the internal interviewers.

When all mandatory fields have been filled, you can proceed to the next step. Here you'll see the following new functionalities:

- A preview of your email. In this way, you can check if all data and styling are correct before you send the email to the candidate.

- An overview of the filled-in interview details from the previous step.

If you want to make changes to the email, you can click on the edit button (pencil icon). This will bring you to the edit template page where you'll see the following new functionalities:

- An overview of all the available merge fields. These can be used by clicking in either one of the editors and/or subject field and then clicking on the desired merge field (also see info text in workflow itself), which will place the merge field in the desired location.
- A new and improved editor.

After you've made the desired changes, you can save them, and you'll return to the previous step. In the preview, you can see how the made changes are displayed for the candidate. When you're satisfied, you can send the invitation by clicking on the "Send invitation" button.

The interview details will then be displayed in the candidate profile just like before. There you'll also be able to edit the interview details. The checkbox "Notify all participants by email" is checked by default, if you wish to notify all participants of the changes that you have made. If you do not wish to notify, you may uncheck the checkbox.

Some important general changes compared to the old interview booking:

- There will be no reminder email option.
- There will be no option to not send an email. If you do not want to send an email to the candidate, you can use the change status menu instead.
- There will be no confirmation link for the candidate. The upcoming calendar integration will replace this functionality. Users can also manually adjust the status of the interview themselves (already possible now).
- The old recruitment calendar page will disappear, as this is only compatible with old interview booking. The new recruitment calendar is located on the start page.

Workflow

1. Invite a candidate for an interview, either from the candidate list or the candidate profile.

2. A modal window opens. Fill all the mandatory fields in order to proceed to the next step.

The screenshot shows a modal window titled "Invite to Interview" with a close button (X) in the top right corner. The form contains the following fields and options:

- Selected candidate:** A button labeled "Maurice Eppenga".
- *Date:** A date input field showing "10/22/2023" with a calendar icon.
- *Interview type:** A dropdown menu with the text "Select interview type".
- *Start time:** A time input field with a clock icon.
- *Duration:** A dropdown menu with the text "Select duration".
- Attending internal interviewers:** A text input field with a magnifying glass icon.
- *Location:** Two radio buttons labeled "On-site" and "Online".
- Bottom left:** A link with a plus icon and the text "Add external interviewer".
- Bottom right:** A green "Continue" button.

3. A preview and overview are presented. Click on the edit button (pencil icon) to make changes to the email.

The screenshot shows the "Invite to Interview" modal with an email preview on the left and a summary on the right. The email preview includes:

- Header:** Recipient: maurice.eppenga@visma.com, Sender: noreply@easycruit.com, Subject: Invitation to First Interview. There is a pencil icon for editing.
- Body:** "Dear Maurice," followed by a paragraph: "We refer to your application for the advertised position of Assistant to the Regional Manager, and are pleased to advise that your application has successfully progressed to the next stage of our recruitment process." and another paragraph: "We now wish to invite you to attend an interview." Below this is the interview details: "Date: 16/11/2023", "Time: 13:00", "Duration: 60", "Interviewer(s): Sherry Fahimi", "Address: Main Street 1", "Directions:".
- Footer:** "If you have any special needs or requirements with regard to the arrangements, please highlight this to us as soon as possible."

The summary on the right side of the modal includes:

- Selected candidate:** "Maurice Eppenga"
- Interview type:** "First interview"
- Attending internal interviewers:** "Sherry Fahimi"
- Attending external interviewers:** "Mark Johnson"
- Interview date & time:** "11/16/2023" and "13:00-14:00"

At the bottom of the modal, there is a "Back" button on the left and a green "Send invitation" button on the right.

4. Edit the template and click on “Apply changes” (or “Cancel”) to return to the email preview again. As indicated, “Cancel” will undo all made changes and “Apply changes” will update the email with the made changes.

Invite to Interview

*Recipient: maurice.eppenga@visma.com *Sender: noreply@easycruit.com

*Subject: Invitation to First Interview

*Content: Dear Candidate first name, We refer to your application for the advertised position of Advertisement title, and are pleased to advise that your application has successfully progressed to the next

Merge fields: Candidate, Candidate first name, Candidate last name, Candidate full name, Candidate salutation, Candidate gender salutation, Password recovery link, Department

Buttons: Back, Apply changes, Cancel, Send invitation

5. When you’re finished, click on “Send invitation” and the candidate will be notified.
6. The interview details will be displayed in the candidate profile afterward.

Interview details [Edit](#)

16 November 2023 | 13:00-14:00 | Main Street 1

Interview type: 1st interview

Interviewers: Mark Johnson, Sherry Fahimi

Interview status: Pending

7. You can always add the edit interview details later if needed by clicking on edit on the top right corner of the interview details box.

Edit Interview details

*Duration: 60 minutes

*Start time: 13:00

Attending internal interviewers: Sherry Fahimi

+ Add external interviewer

Mark Johnson

mark.johnson@domain.com

*Location: On-site Online

Main Street 1

Notify all participants of changes via email

Cancel Apply changes

New email templates for interview booking (16th of November 2023)

Purpose and scope

Together with the new interview booking workflow, we've created new email templates. We've replaced the old interview templates and also added some extra email templates to give admins more possibilities for customizing.

Description

We've rebuilt four email templates:

- Initial meeting/telephone interview
- First interview
- Second interview
- Third interview

We've created three new email templates:

- Invitation for interviewers to a new interview
- Notification for candidates about interview changes
- Notification for interviewers about interview changes

All of these templates have a completely new design and we've added the following functionalities:

- A sender field, so you could set a shared recruitment email address as the default sender, for example. If you leave the sender field empty, email sending will follow the same logic as before (most of the time the user's email address is used).
- An overview of all the available merge fields. These can be used by clicking in one of the editors or subject field and then clicking on the desired merge field (also see info text in workflow itself), which will place the merge field in the desired location.
- A new and improved editor.
- Every email template will now have the option to add attachments. It is now possible to, for example, attach travel directions or information about the company.

If you want to see how an email would look like for the candidate, you can click on the "Preview" button. The merge fields will be displayed as general data like "Candidate's first name".

Some important general changes compared to the old email templates for interview booking:

- There will be no option to not send an email. If you do not want to send an email to the candidate, you can use the change status menu instead.
- There will be no delay option.
- There will be no reminder option.

IMPORTANT NOTE: email templates from old interview booking will be migrated to the new email templates. After the release of new interview booking, you have to do a check yourself to make sure the text is still properly aligned and all merge fields are in place.

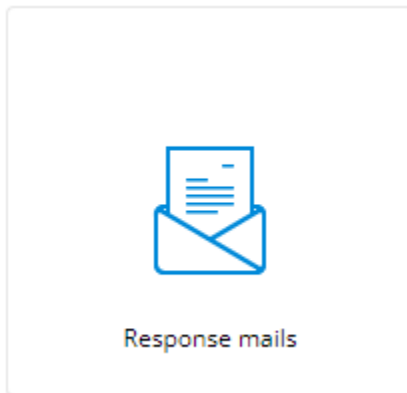
Some merge fields have been removed:

- {route}
- {veibeskrivelse}
- {bekreftlink}
- {confirmlink}





Be sure to also check for different languages and departments if you've made customisations there.

Workflow

1. Navigate to the response emails tile in admin settings.



2. Click on one of the interview templates.

Meeting invitation / rejection:	
 Initial meeting/telephone interview	Email for invitation to the information meeting/telephone interview.
 First interview	Email for invitation to the first interview.
 Second interview	Email for invitation to the second interview.
 Third interview	Email for invitation to the third interview.

3. Select a department.

Template management

Selected department
No department selected

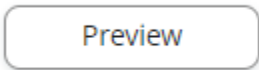
Change department ⓘ

Edit email template - First interview

i Please start by selecting for which department you want to edit the template. You do that on the left-hand side under "Change department".

4. Start editing the email.

5. Click on “Preview” to see how your changes will be perceived by the receiver.



6. When you’re done, click on “Save” to save your changes.

