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.

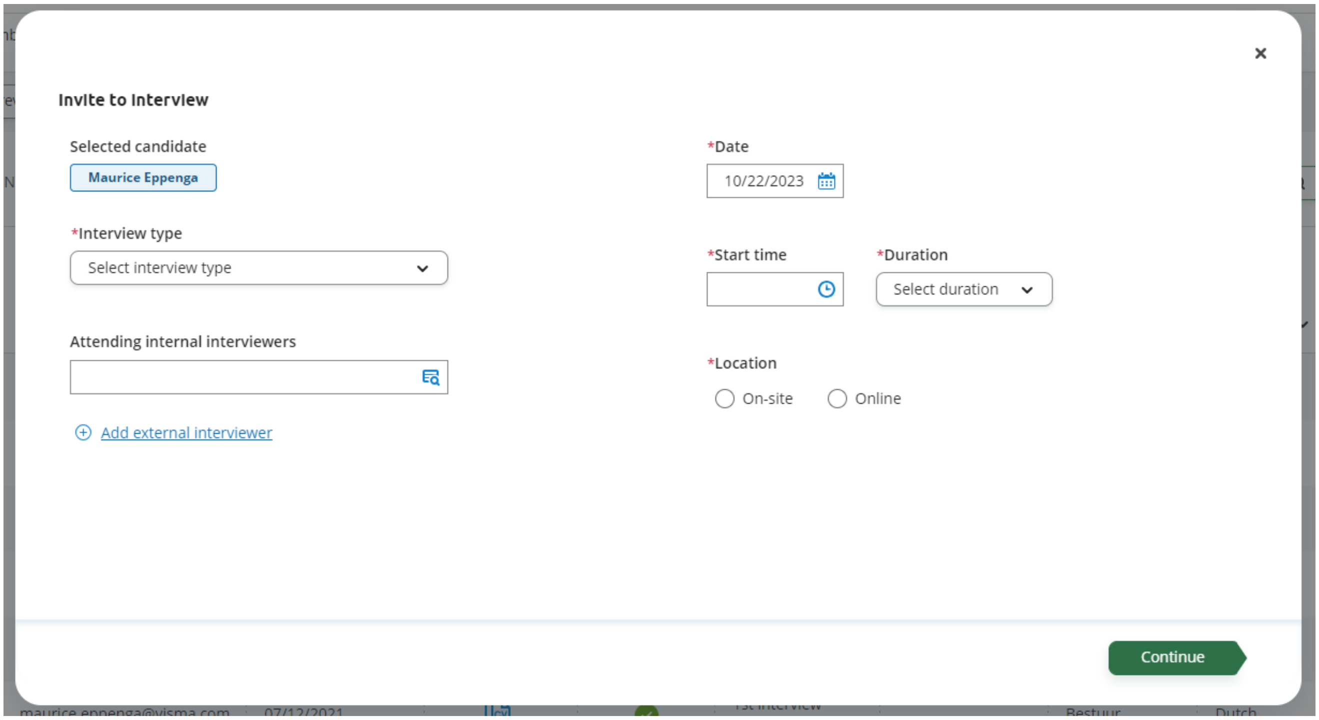
Some important general changes compared to the old interview booking:

- 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.

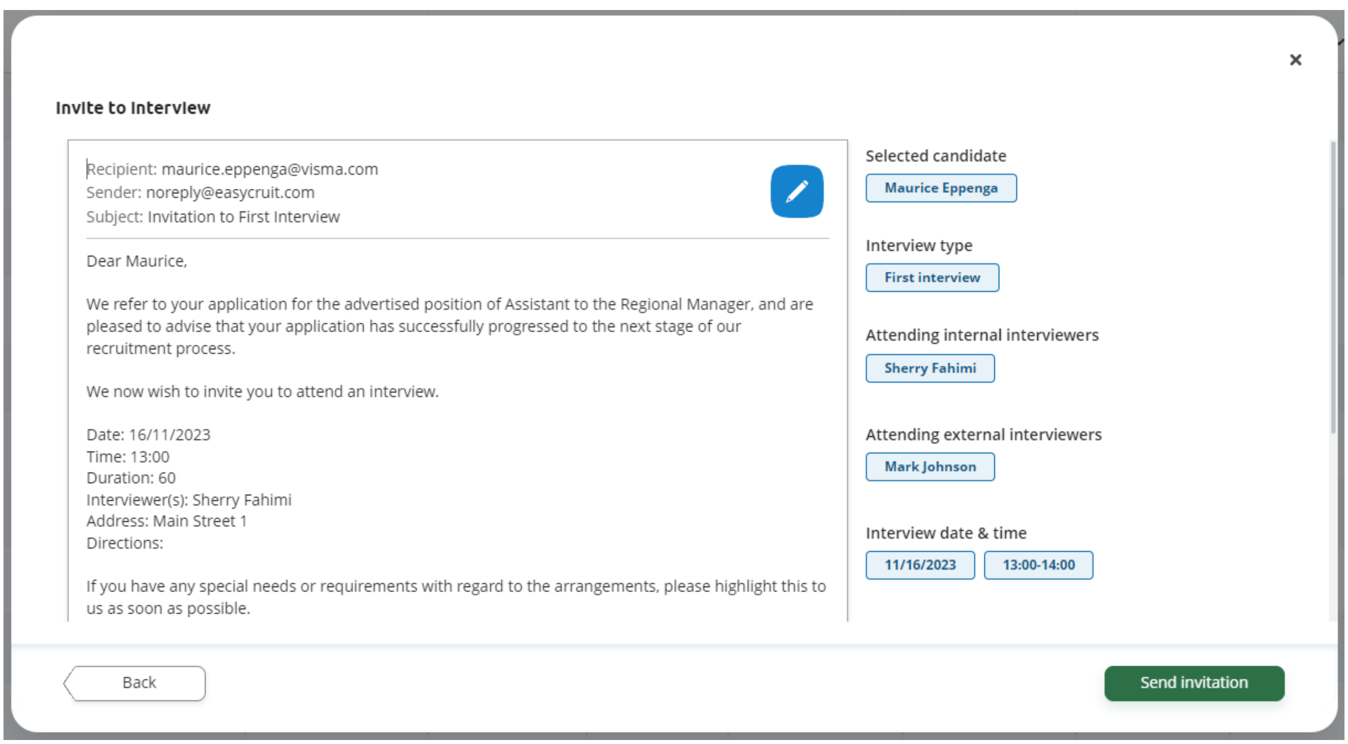
Workflow

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

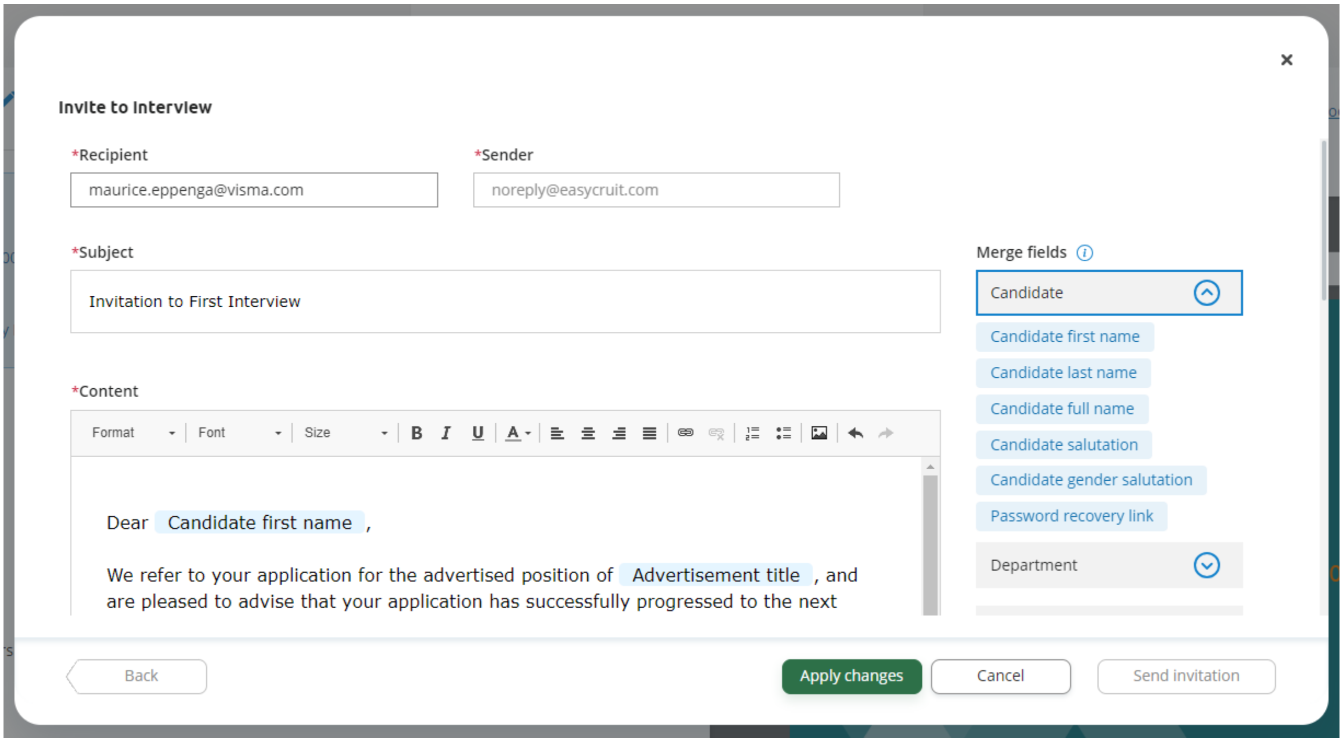
2. A modal window opens. Fill all the mandatory fields in order to proceed to the next step.



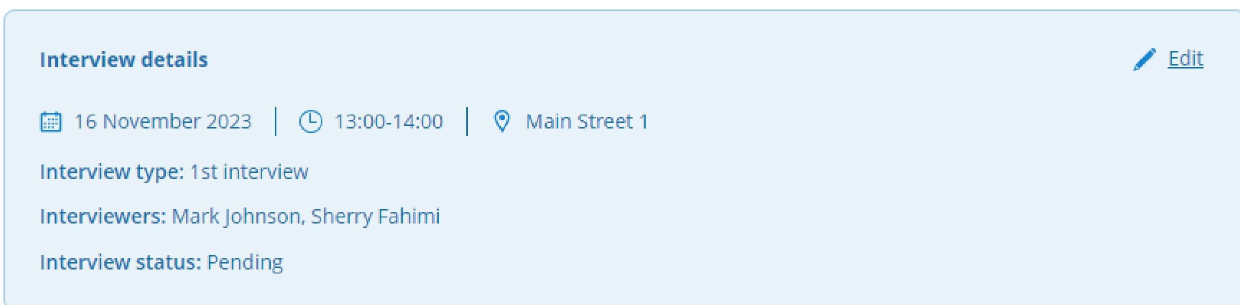
3. A preview and overview are presented. Click on the edit button (pencil icon) to make changes to the email.



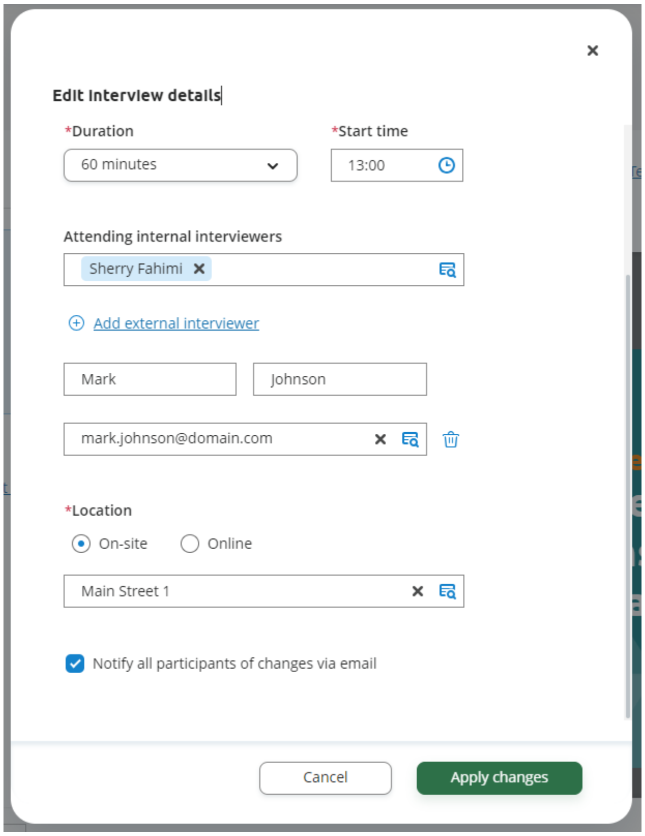
4. Edit the template and click on “Apply changes” (or “Cancel”) to return to the email preview again. As indicated, “Cancel” will undo all made changes and “Apply changes” will update the email with the made changes.



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.



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.



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.

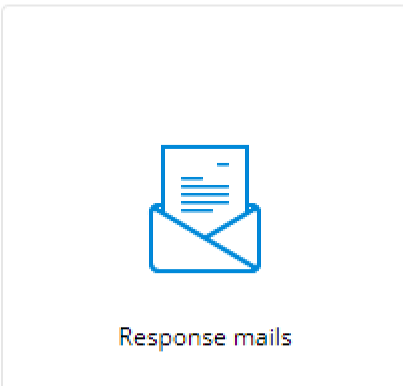
IMPORTANT NOTE: email templates from old interview booking will be migrated to the new email templates. After the release of new interview booking, you have to do a check yourself to make sure the text is still properly aligned and all merge fields are in place. Some merge fields have been removed:

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

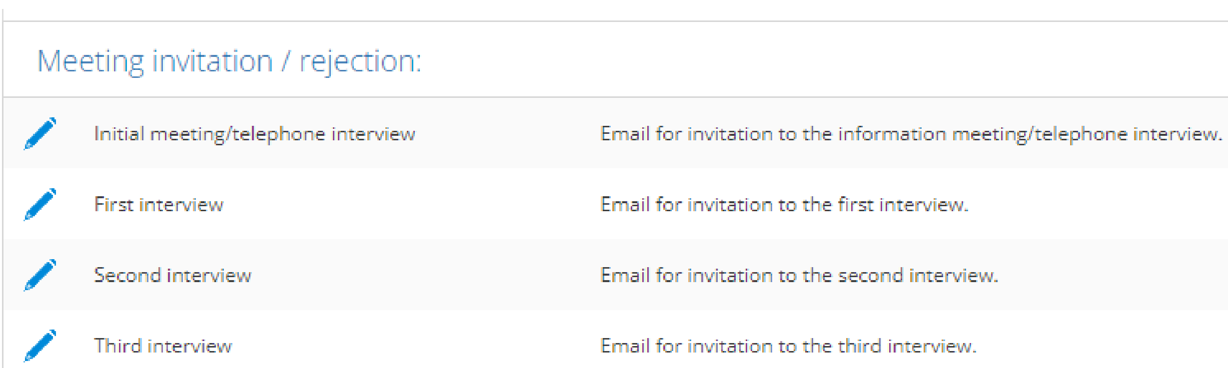
Be sure to also check for different languages and departments if you've made customisations there.

Workflow

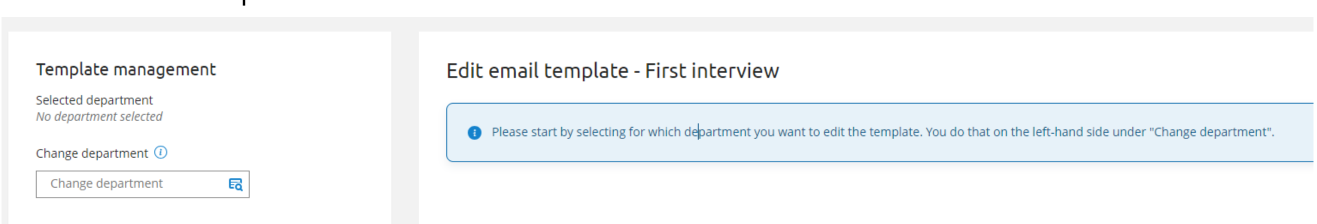
1. Navigate to the response emails tile in admin settings.



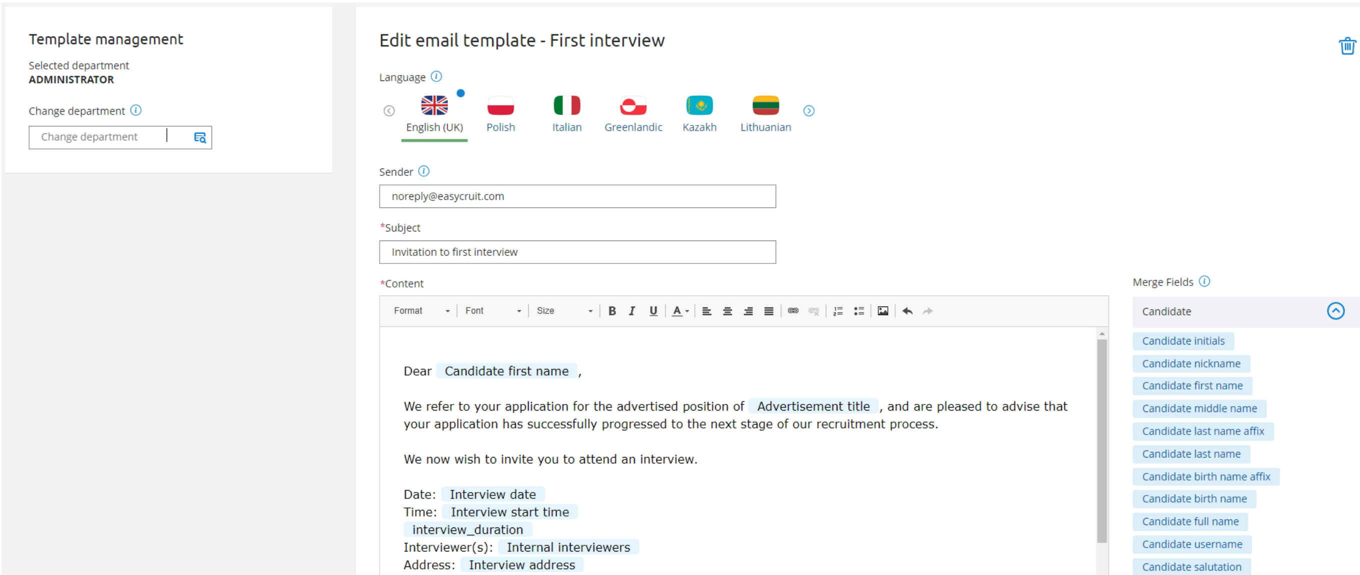
2. Click on one of the interview templates.



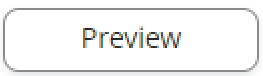
3. Select a department.



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.