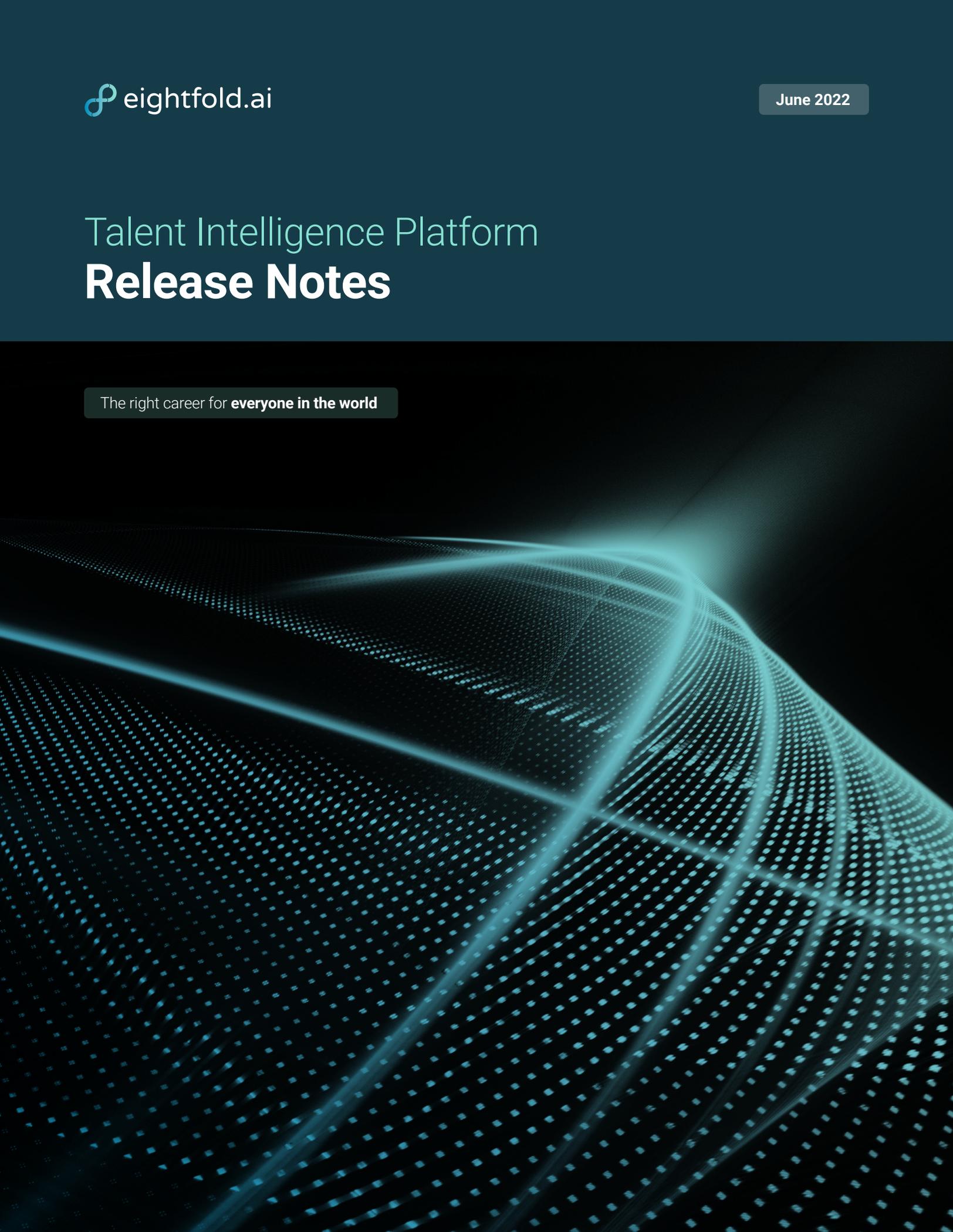


# Talent Intelligence Platform **Release Notes**

The right career for **everyone in the world**



## May 26, 2022 Eightfold Talent Intelligence Platform v1.15

**Talent Acquisition:** Talent Communities Quicksight dashboard, workflow automation, footer disclosures in event landing pages, extend event registration past the event end time, post interview candidate email

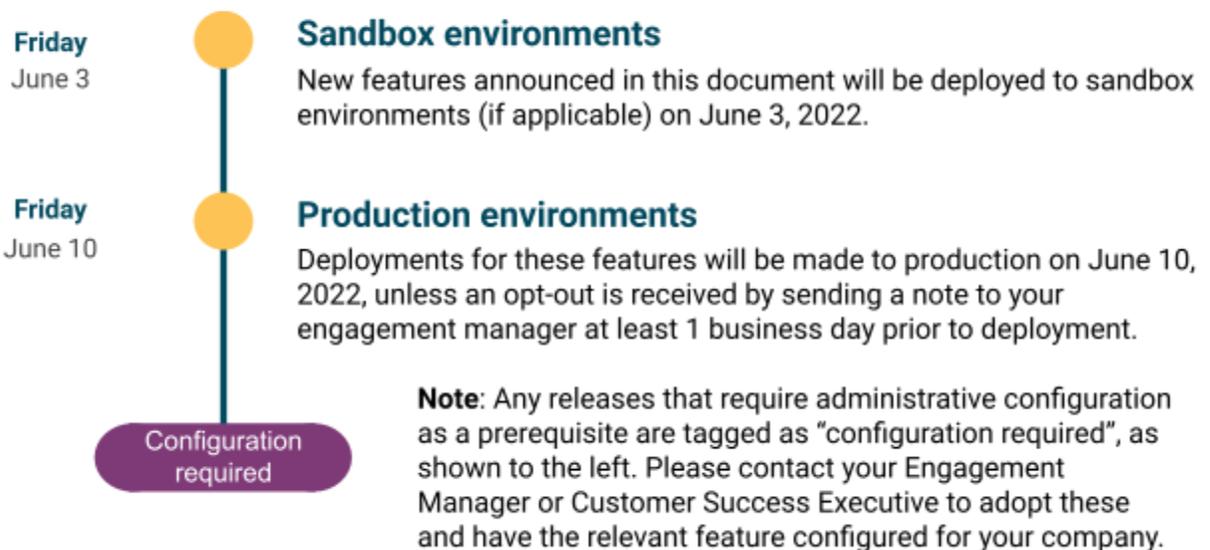
**Talent Management:** Caretaker tags in Succession Planning, competency/skills search filters in Succession Planning, new notification settings page

**Talent Intelligence Platform:** Custom mapping tool for configuring fields in ATS, API Version 2 update

**Talent Experience:** “Last click” attribution for application source tracking, new source grouping for visitor source tracking in Career Site Dashboard

**App Platform:** Invocation replay, enhanced error messages for Career Hub integrations, pre-sales app support channel

## Release v1.15 key dates and timelines



# Release notes

## Talent Acquisition

Configuration not required

Minor

### ***Talent Communities Quicksight Dashboard***

**New dashboard.** The Talent Communities Quicksight Dashboard is a new dashboard where users can get meaningful insights about the sourcing activity effectiveness of Talent Communities and how different sourcers are contributing toward overall sourcing goals. The new dashboard also provides insights about gender and ethnicity distribution across communities so users can work toward diversity and inclusion goals even before candidates are in the hiring pipeline. [Read more>>](#)

Configuration not required

Major

### ***Workflow automation***

**New feature.** Sourcing and recruiting teams spend a substantial amount of time identifying prospects, nurturing them, and moving them forward in sourcing and recruiting stages. Much of this work is repetitive in nature, and these repetitive tasks can consume bandwidth that could be used on more meaningful strategic engagements. Workflow automation (WFA) is an AI-powered automation framework that aims to address this issue by helping talent acquisition teams automate the most repeated recruiting and sourcing tasks across talent communities and hiring pipelines. [Read more>>](#)

Configuration required

Minor

### ***Ability to have footer disclosures in event landing pages***

**Enhancement.** Eightfold will now support event landing pages having a footer disclosure containing information about a company's equal opportunity policy. This enhancement will be standard across all event landing pages. [Read more>>](#)

Configuration required

Minor

### ***Ability to extend event registration past the event end time***

**Enhancement.** Eightfold has learned that attendees of recruiting events sometimes want to wait till after an event to register for the event. Up to this point attendees have not had that option, as event registration ended once the event started. This enhancement allows users to cater to events where attendees tend to register after the event. [Read more>>](#)

Configuration required

Minor

### ***Post interview candidate email***

**New feature.** The new post interview candidate email is an automated email sent to a candidate at the end of every interview and is aimed at improving the candidate experience. Admins can use this email to thank candidates for their time and ask for feedback on the interview process through a survey. [Read more>>](#)

## Talent Management

Configuration  
required

Minor

### ***Caretaker tags in Succession Planning***

**New feature.** You can now add Caretaker tags to employees to your succession plans. This status indicates employees who can temporarily fill a role, but do not need to also be not long-term successors. [Read more>>](#)

Configuration  
required

Minor

### ***Competency search filters in Succession Planning***

**Enhancement.** In the Succession Planning and My Teams pages, organizations can now configure Skills/Competency search filters. [Read more>>](#)

Configuration not  
required

Minor

### ***New notification settings page***

**Enhanced UI.** A new Settings page is in the Career Hub, accessible from the user account menu, where employees can manage their notification preferences. [Read more>>](#)

## Talent Intelligence Platform

Configuration  
required

Major

### ***Custom mapping tool for configuring fields in ATS***

**New feature.** Users can now save remote data directly on MySQL and leverage the same to configure custom fields on the Admin console with the Custom Mapping tool.

[Read more>>](#)

Configuration  
required

Major

### ***Eightfold API Version 2 update***

**New feature.** Eightfold API users can now opt to leverage a completely new set of APIs labeled API v2 along with a major upgrade to existing APIs as V2. This version will enable users to directly create Eightfold entities without ATS or HRIS data. [Read more>>](#)

## Talent Experience

Configuration not required

Minor

### ***“Last click” attribution for application source tracking***

**Enhancement.** Application Sources will now, by default, use the most recently accessed (“last click”) source, rather than the source first accessed (“first click”). [Read more>>](#)

Configuration not required

Minor

### ***Group by sources for visitor source tracking in Career Site Dashboard***

**Enhancement.** In the Career Site Dashboard, sources will now, by default, be grouped by domain. Previously, sources from the same domain and with unique URLs were treated as individual, unique sources. [Read more>>](#)

## App Platform

Configuration not required

Major

### ***Invocation replay (for app developers)***

**New feature.** Invocation replay provides a history of instance-specific invocations of your app. In the app monitor, developers can view details related to a given invocation, including trigger type, timestamp, and metadata. [Read more>>](#)

Configuration not required

Minor

### ***Enhanced error messages for Career Hub integrations***

**Enhancement.** Errors displayed in the Eightfold UI can originate from any component in the system, including third-party integrations. Enhanced error messages for Career Hub integrations speed up the resolution of technical issues by narrowing the problem to specific systems, reducing troubleshooting effort wasted on components not implicated. [Read more>>](#)

Configuration not required

Minor

### ***Pre-sales app support channel***

**New feature.** Visitors to the app Marketplace can now request pre-sales support from the detail page of any app. By clicking the **Learn more** button on the app detail page, users can enter contact information and specific questions to engage SMEs from both Eightfold and the app developer. [Read more>>](#)

## Release details

### Talent Acquisition

#### ***Talent Communities Quicksight Dashboard [No configuration required]*** ***[minor]***

The Talent Communities Quicksight Dashboard is a new dashboard where users can get meaningful insights about the sourcing activity effectiveness of Talent Communities.

User personas targeted

Sourcers, sourcing leads

Needs addressed

The Eightfold Talent Communities feature can be a valuable sourcing tool, but without data to understand the effectiveness of the feature, users are not getting the feature's full value. This new dashboard provides insights about Talent Community diversity metrics, sourcing trends, and engagement trends.

Feature details

To access the Talent Communities Quicksight Dashboard, take the following steps:

1. Open a supported browser, and go to <https://app.eightfold.ai>.
2. Enter the email address and password for your Eightfold account.
3. Click **Sign In**.
4. Select the Dashboards tab.
5. Select **Talent communities dashboard**.

The dashboard has two tabs: a Summary tab and a Community Deep Dive tab. In the Summary tab, you'll see several key pieces of information. At the top there are high-level metrics related to your communities, including the number of prospects added to your community and the number of prospects contacted.

The next section provides information about the sourcing funnel by gender and ethnicity and the gender and ethnicity distribution across your communities.



### TA.1: Graphs about gender and ethnicity distribution across communities

This information may help you understand whether you are effectively working toward your diversity goals.

The next section provides information about sourcing to help you identify and act on sourcing trends. It includes data about activity by community and by sourcer, so you can learn about which communities or users are most effective by gender and ethnicity.

The Community Deep Dive tab can help you see the data presented in the Summary tab at a more granular level.

## ***Workflow automation [No configuration required] [major]***

WFA helps talent acquisition teams automate the most repeated recruiting and sourcing tasks across talent communities and hiring pipelines.

User personas targeted

Admins, sourcers, recruiters, hiring managers

Needs addressed

- Help enterprises jumpstart their TA efforts with an Eightfold recommended workflow library
- Enable tailored automated workflows to support each user's unique real-life use cases across talent communities and hiring pipelines
- Provide easy-to-serve UI to ensure that recruiters and sourcers can tailor the workflows

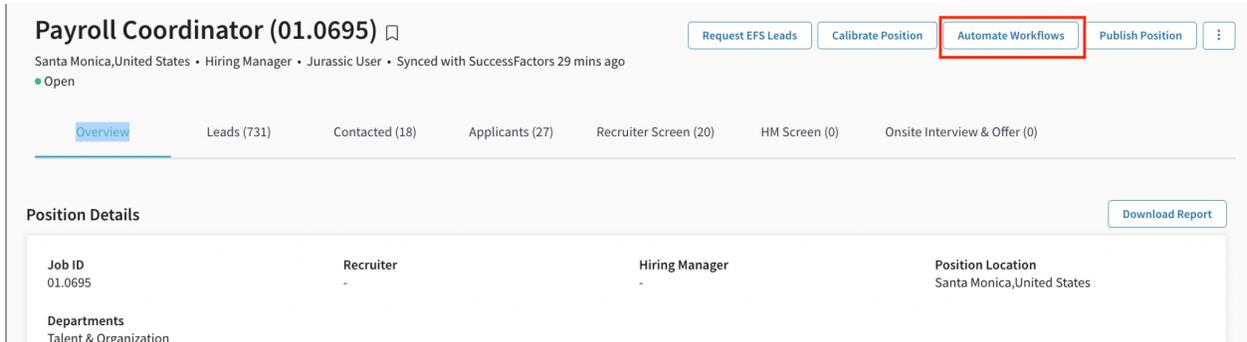
Feature details

To access WFA through Positions and Eightfold Talent Communities, take the following steps:

1. Open a supported browser, and go to <https://app.eightfold.ai>.
2. Enter the email address and password for your Eightfold account.
3. Click **Sign In**.

To access WFA through Positions:

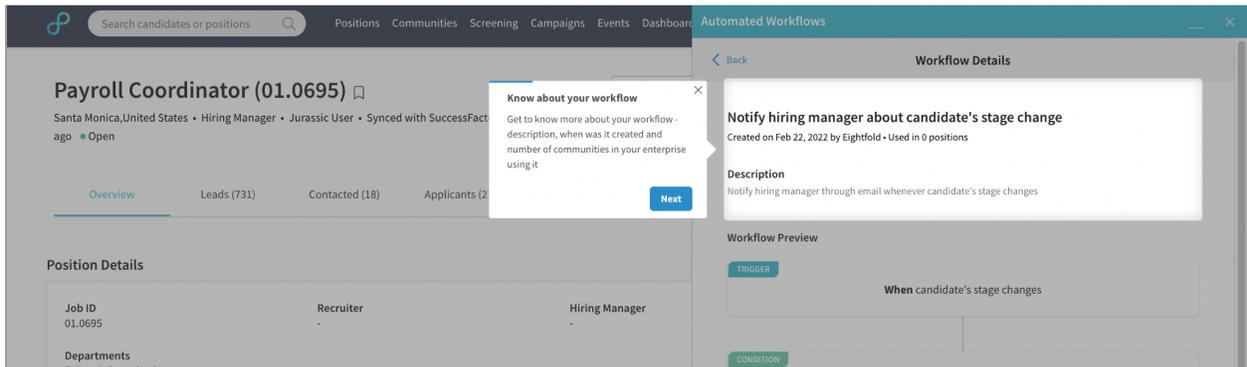
1. Go to the Positions tab and select the position for you which you'd like to automate a workflow.
2. From the Overview page for the position, click **Automate Workflows**.



### TA.2: Automate Workflows button

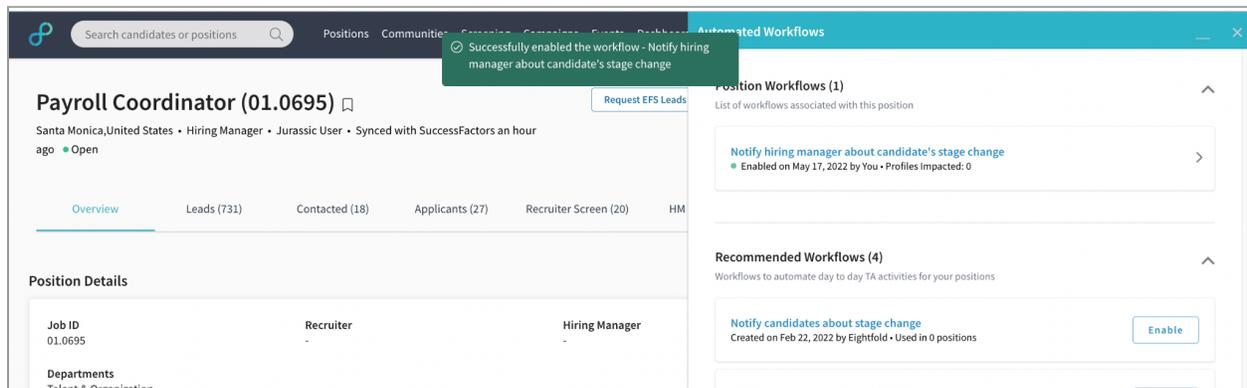
This will bring up an Automated Workflows window with several Eightfold recommended workflows.

3. Select the workflow you would like to enable by clicking the workflow name or **Enable**. The first time you open the workflow, a new user tour will open. Take the tour if desired by clicking **Next**, or exit the tour by clicking the **X**.



### TA.3: WFA new user tour

4. Complete the workflow fields as needed. The trigger will already be set up, but you can select from dropdown menus for the workflow condition and the workflow action.
5. Click **Enable Workflow**.
6. You will see a confirmation message about your workflow, as well as a new Position Workflows section, where your workflow will appear.



#### TA.4: WFA confirmation message and Position Workflows section

- Once you start using your workflow, you will see how many profiles have been affected by the workflow.

To access WFA through Communities:

- Go to the Communities tab, and select the community for you which you'd like to automate a workflow.
- From the Overview page for the community, click **Automate Workflows**.

Like accessing WFA from Positions, this will bring up an Automated Workflows window with several Eightfold recommended workflows. The recommended workflows in Communities are different from the recommended workflows in Positions, but you can set up the Communities workflows by taking the same steps as described for workflows in Positions.

### ***Ability to have footer disclosures in event landing pages [Configuration required] [minor]***

This enhancement to event landing pages allows users to set up a footer disclosure containing information about a company's equal opportunity policy, as well as company contact links and social media links and icons.

User personas targeted

Event leads, event team members

Needs addressed

- Previously users had no way to include a company disclosure in the event landing pages. This enhancement addresses that need.
- This enhancement also allows users to further customize their event landing pages at an enterprise level by including social media links in the footer.

Feature details

Once the footer disclosure is configured at an enterprise level, users will see the disclosure at the bottom of each event landing page. The disclosure can feature information about a

company's standard diversity and inclusion policies and include text, hyperlinks, and some icons.

**Disclaimer**

*Ecma is an equal opportunity employer committed to diversity and inclusion in the workplace. All qualified applicants will receive consideration for employment without regard to sex, race, color, age, national origin, religion, sexual orientation, gender identity, protected veteran status, disability or other protected status.*

*If you require a reasonable accommodation to participate in any step in the recruiting process, please contact Ecma Recruiting at 1-877-989-76756 or via email at [hr@ecma.com](mailto:hr@ecma.com). All information you provide will be kept confidential and will be used only to the extent required to provide needed reasonable accommodation.*

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### TA.5: Footer disclosure example

## ***Ability to extend event registration past the event end time [Configuration required] [minor]***

This enhancement allows users to set event registrations to not expire at the time of an event, therefore extending the registration period to after the event.

User personas targeted

Event leads, event team members

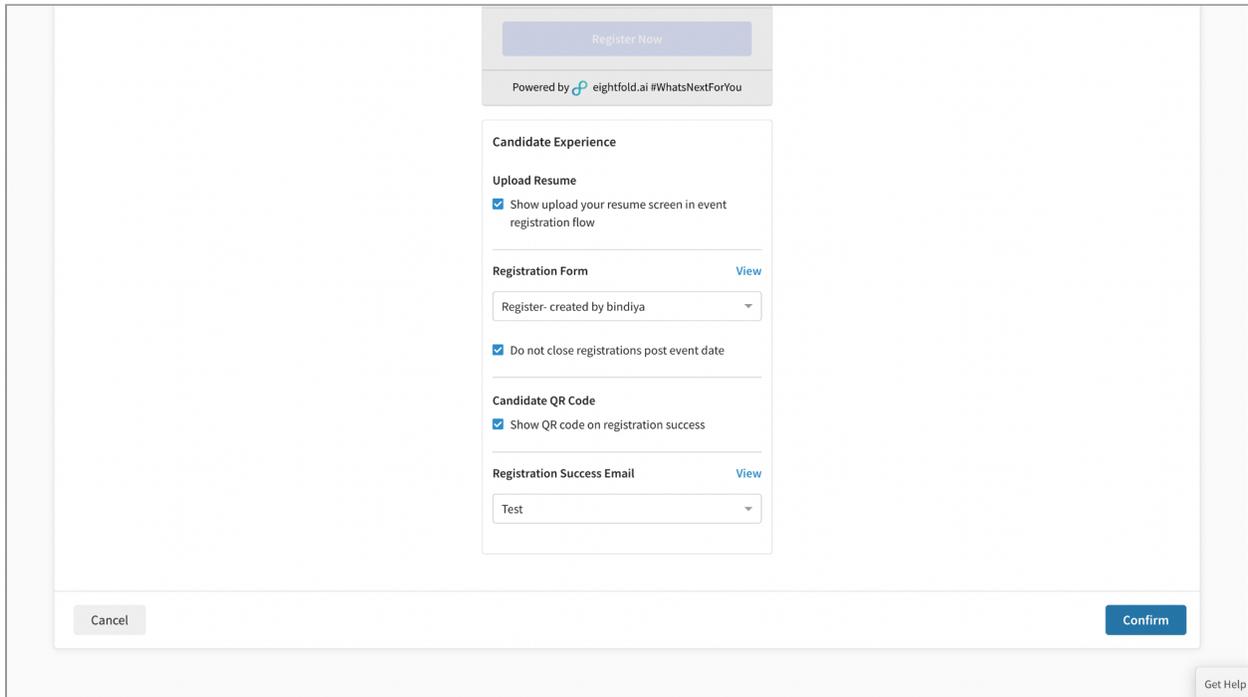
Needs addressed

Previously event registration ended at the time of the event, but now users have the ability to extend the registration period past the time of the event.

Feature details

To extend an event registration period, take the following steps.

1. Open a supported browser, and go to <https://app.eightfold.ai>.
2. Enter the email address and password for your Eightfold account.
3. Click **Sign In**.
4. Navigate to the Events tab and select the event you would like to adjust the registration period for.
5. Select the Landing Page tab.
  - a. If you have not yet confirmed the landing page:
    - i. Scroll to the Candidate experience section of the page and click the checkbox for **Do not close registrations post event date**.



#### TA.6: Do not close registrations post event date checkbox when editing event landing page

- ii. Click **Confirm**.
- b. If you have already created/confirmed the event landing page:
  - i. Click **Edit Landing Page**.
  - ii. Scroll to the Candidate experience section of the page and click the checkbox for **Do not close registrations post event date**.
  - iii. Click **Confirm**.

Now when candidates are registering for an event, the event registration period will not expire, and they can register after the event.

#### ***Post interview candidate email [Configuration required] [minor]***

The new post interview candidate email is aimed at offering admins an automated way to thank candidates for their time and gather feedback on the interview at the end of every interview. This can be enabled only at the company level and, once enabled, will be sent out after every interview.

User personas targeted

Admin, recruiter

Needs addressed

This feature makes it easier for users to thank candidates and gather feedback from them about the interview experience after every interview.

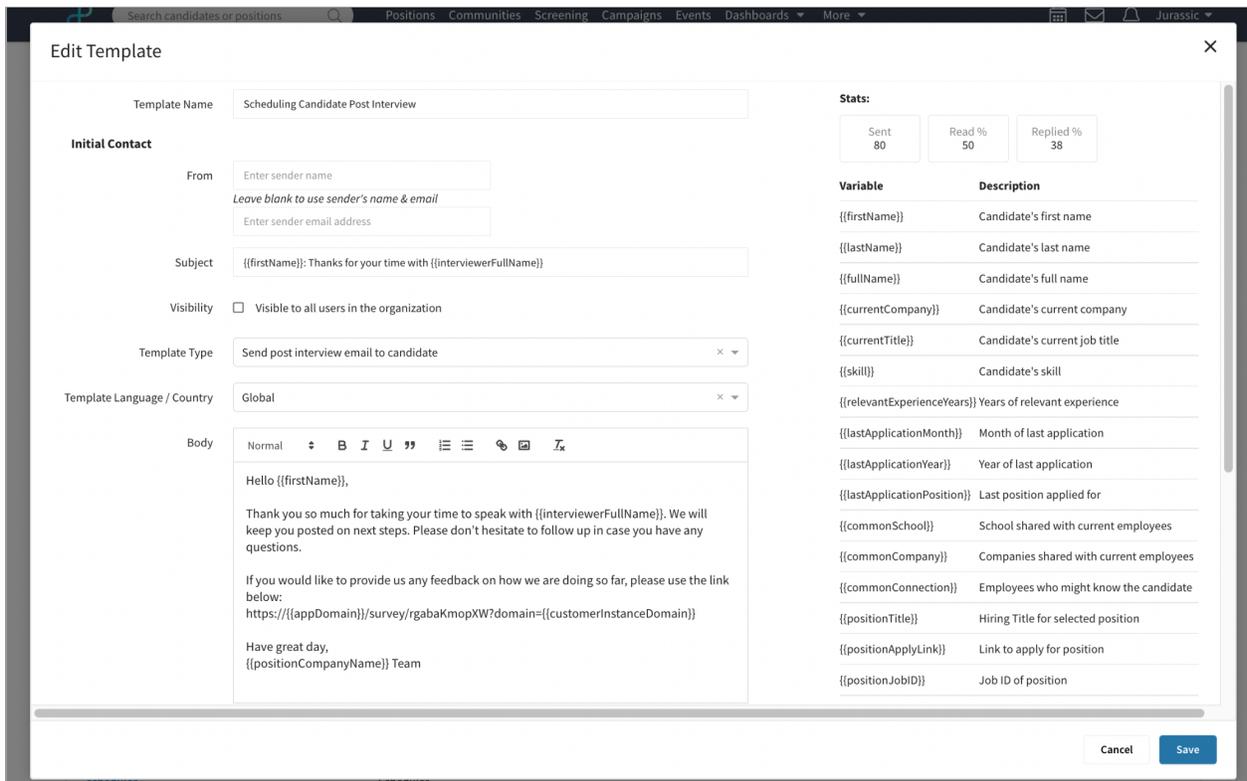
## Feature details

By default, this feature is NOT enabled. To enable it, admins need to take the following steps:

1. Set **send\_post\_interview\_candidate\_email** property in the **scheduling\_config** in the Admin Console to TRUE.
2. Create a custom communication template of the category *Scheduling candidate post interview template* in Communication templates. If no custom template is set, the system default template will be used.

To access the new communication template, take the following steps:

1. Open a supported browser, and go to <https://app.eightfold.ai>.
2. Enter the email address and password for your Eightfold account.
3. Click **Sign In**.
4. Click your user icon, and select **Account**.
5. Select the Communication Templates tab.
6. In the search bar, search for **Scheduling Candidate Post Interview**.
7. Make a copy of the system default template and make changes as needed.
  - a. Click the Copy Template icon in the ACTIONS column. This will bring up an Edit Template form where you can make changes.
  - b. Make your changes and then click **Save**.



**Edit Template**

Template Name: Scheduling Candidate Post Interview

**Initial Contact**

From: Enter sender name  
Leave blank to use sender's name & email  
Enter sender email address

Subject: {{firstName}}: Thanks for your time with {{interviewerFullName}}

Visibility:  Visible to all users in the organization

Template Type: Send post interview email to candidate

Template Language / Country: Global

**Body**

Normal B I U " ' ≡ ≡ ☰ ☑ ✎

Hello {{firstName}},

Thank you so much for taking your time to speak with {{interviewerFullName}}. We will keep you posted on next steps. Please don't hesitate to follow up in case you have any questions.

If you would like to provide us any feedback on how we are doing so far, please use the link below:  
<https://{{appDomain}}/survey/rgabaKmopXW?domain={{customerInstanceDomain}}>

Have great day,  
{{positionCompanyName}} Team

**Stats:**

Sent 80 Read % 50 Replied % 38

Variable	Description
{{firstName}}	Candidate's first name
{{lastName}}	Candidate's last name
{{fullName}}	Candidate's full name
{{currentCompany}}	Candidate's current company
{{currentTitle}}	Candidate's current job title
{{skill}}	Candidate's skill
{{relevantExperienceYears}}	Years of relevant experience
{{lastApplicationMonth}}	Month of last application
{{lastApplicationYear}}	Year of last application
{{lastApplicationPosition}}	Last position applied for
{{commonSchool}}	School shared with current employees
{{commonCompany}}	Companies shared with current employees
{{commonConnection}}	Employees who might know the candidate
{{positionTitle}}	Hiring Title for selected position
{{positionApplyLink}}	Link to apply for position
{{positionJobID}}	Job ID of position

Cancel Save

### TA.7: System default Scheduling Candidate Post Interview communication template

## Talent Management

### ***Caretaker tags in Succession Planning [Configuration required] [Minor]***

You can now add Caretaker tags to employees to your succession plans.

User personas targeted

Hiring managers/leaders, HRBPs

Needs addressed

This feature allows for organizations to plan for temporary gaps in team leadership for critical roles.

Feature details

You can now add Caretaker employees to your succession plans. Caretakers are employees who can temporarily fill a role, but do not need to be long-term successors. You can set both a succession state and use the caretaker tag for the same employee.

To add or remove caretakers tags to employees who are already in the succession plan pipeline, in the row corresponding to the employee, click .

Order	Employee	Role Criticality	Succession Roles	Succession Readiness	Match Score
= 1	 Nico Ionatti VP Marketing	12 		Ready Later ▾	 4.28   

#### **TM.1: Caretaker tag in Succession Planning**

You don't have to be a successor on a succession plan to be a caretaker.

1. For a given succession plan, navigate to the succession planning management page.
2. Click **+ Add employee**.
3. Select an employee.
4. If the employee is not a successor, set the employee's **Succession readiness** state to N/A.
5. In the row corresponding to the employee, click .

Adding caretakers updates the heatmap at the top of the succession planning management page.

### ***Competency search filters in Succession Planning [Configuration required] [Minor]***

You can now configure search filters based on Skills/Competency.

#### User personas targeted

Hiring managers/leaders, HRBPs, and Talent Admins

#### Needs addressed

- More intuitive search experience
- Ability to configure filters to an organization's specific needs

#### Feature details

- HRBPs and managers can filter the list of recommended successors displayed based on specific skills/competencies **as well as** their associated manager ratings, if any
- The user has the ability to choose any number of skills/competencies
- This filtering capability enables HRBPs and managers to identify and pick successors that meets their organization's or department's business/corporate goals

### ***New notification settings page [minor] [No configuration required]***

This feature allows employees to control, from a dedicated page, their notification preferences for recommended jobs.

#### User personas targeted

Employees

#### Needs addressed

Employees could previously only access notification settings on the Goals page; the new Settings page provides a more centralized, intuitive experience for managing these settings

#### Feature details

- The Settings page is accessible from the Career Hub navigation bar within the user account menu
- Employees can choose to receive job recommendation notifications daily, weekly, monthly, or disable entirely
- The Alerts section on the Goals page, where these notifications were previously managed, now shows a link to the new Settings page

## Talent Intelligence Platform

### ***Custom mapping tool for configuring fields in ATS [Configuration required] [major]***

Starting this release, the custom mapping tool can be used to configure custom fields inside the ats\_config with data from remote systems. This tool helps customers also view popular configuration choices derived from their existing data and improve configuration experience.

#### User personas targeted

- Solution Architects and Engagement Managers in Eightfold
- Implementation partners

#### Needs addressed

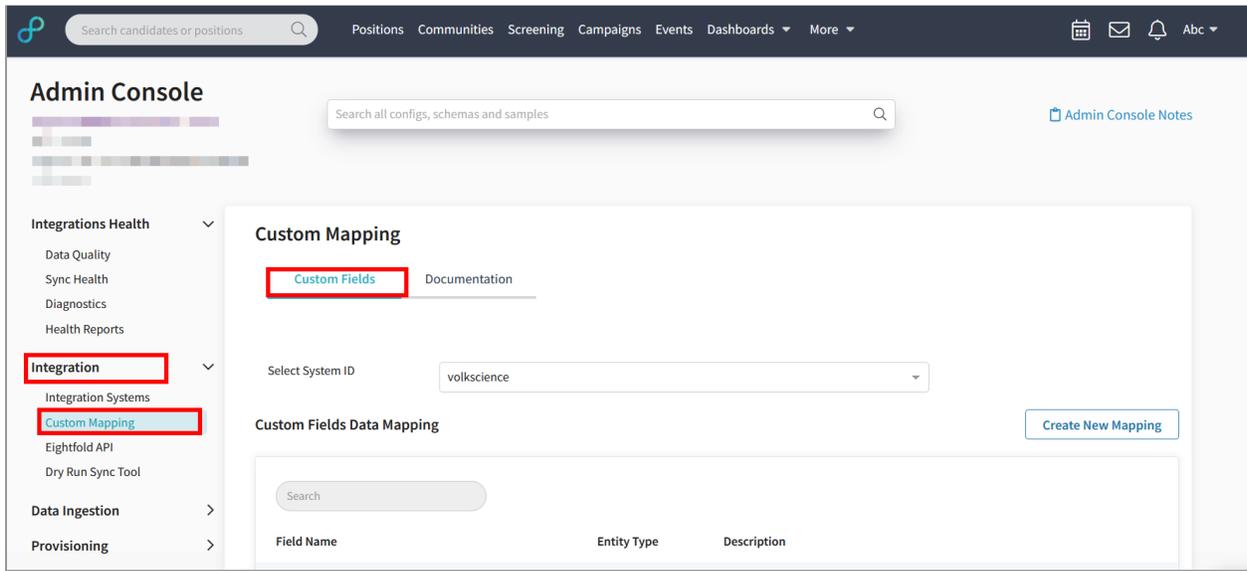
Prior to this release, users ingested data through the ats\_config. This made knowledge of macros a necessity and validation of the end-to-end flow a complex process. Starting this release, a new custom mapping tool will ensure the capture of richer data through a two-way data flow with remote systems. This will not only make macros more user-friendly, but also cut down on the implementation time required to ingest custom fields data.

#### Feature details

The new Custom Mapping tool will:

1. **Allow easy data ingestion:** Users can configure data shown under various Eightfold products viz, candidate profile, employee profile, position, and pipeline.
2. **Provide popular recommendations:** Using existing data from remote systems, users can select custom fields and macros which proved most beneficial to them in the past.
3. **Support every macro in the code:** Each macro will have specific (supported) inputs and concise descriptions to help with configuration.
4. **Display the final value for the configured custom field:** The custom mapping tool will perform validations to prevent incorrectly configured fields from being saved in the config that could cause product downstream issues.

On the Admin Console, users can configure custom fields here: Integration->Custom Mapping->Custom Fields



### TIP.1: Using the custom mapping tool to configure custom fields

Read the [Custom Mapping how-to guide](#) for a step by step walkthrough of the custom mapping tool.

## ***Eightfold API Version 2 update [Configuration required] [major]***

This release equips Eightfold API service users with enhanced functionality and improved user experience. The API v2 will provide Eightfold customers the opportunity to integrate better with Eightfold APIs.

### User personas targeted

- Integration teams
- Solution Architects and Engagement Managers in Eightfold

### Needs addressed

The Eightfold API v2 service was launched to help Eightfold users build independent systems over the Eightfold system, allowing for independent integrations.

### Feature details

- **Core Eightfold entities exposed through the API layer:** Along with ATS and HRIS entities, starting this release, Eightfold entities are now exposed through the API v2 layer. This enables users to directly create eightfold entities (for e.g., Profile) without any ATS or HRIS data. This is a major capability enhancement as this will enable users to build independent systems on top of Eightfold ecosystem without a need for another system.
- **All APIs are now RESTful:** This has helped make the API v2 more globally standardized and easier to consume.
- **Support for PATCH operations:** Eightfold now supports PATCH operations on most Eightfold entities, not supported in our v1. This allows users to update only what has changed making change management way more efficient.

- **Richer Entity Schema.** The Entity schema of API v2 is much richer than v1 thus giving way more information and control while integrating with Eightfold systems.
- **Support for Async Update:** Async update support enables users to post an update and monitor the status later. This gives a lot more flexibility to users and allows them to ensure data consistency.
- **Namespacing in APIs.** Name spacing of APIs in v2 lets users quickly discover entities and capabilities they may be interested in. This makes consuming the APIs simpler and evades unnecessary confusions.
- **Support for OAuth 2.0 authentication layer:** API v2 uses OAuth 2.0 authentication thus making it more secure and helps clients satisfy high levels of security compliance standards.

For more information, read the [API v2 tutorial](#) and see what's changed as compared to v1.

## Talent Experience

### ***“Last click” attribution for application source tracking [No configuration required] [Minor]***

Application Sources, which are surfaced in the application view on the pipeline page and sent to your ATS, will now by default use the most recently accessed (“last click”) source, rather than the source first accessed (“first click”).

#### User personas targeted

Recruiters, Sourcers

#### Needs addressed

- Simplification of source tracking between the source value tracked in the career site dashboard for each visitor activity, which already use “last click” attribution, and Application Sources sent to your ATS, leading to easier attribution analytics
- “Last click” attribution provides added insight into the sources that lead to conversion

#### Feature details

Eightfold’s Application Source that is sent to your ATS will now by default use “last click” attribution when determining the source of an application.

For example, if a candidate has the following traffic activity: Google -> Career Site -> LinkedIn -> Career Site -> Application, the Application Source will now be captured as LinkedIn. Previously, the Application Source would have been captured as Google.

This setting is configurable; users who wish to continue to use “first click” attribution for Application Sources can change the setting in the Admin Console.

### ***Group by sources for visitor source tracking in Career Site Dashboard [No configuration required] [Minor]***

In the Career Site dashboard, which tracks the source associated with each visitor activity (visit, resume upload, job views, application starts, application submits), sources will now by default be grouped by domain. Previously, sources from the same domain but with unique URLs were treated as individual, unique sources.

#### User personas targeted

Admins

#### Needs addressed

Easier built-in grouping of sources in dashboard views to help quickly generate insights on sources.

## Feature details

- Eightfold will now extract the domain from the captured sources and will group sources of the same domain together
- For example, the following sources would previously be tracked separately, but are now all grouped under the google.com source domain:
  - www.google.com
  - google
  - m.google.com
  - m.google.co.in
- This setting is configurable; users who wish to restore to the previous behavior (grouping sources separately) can do so in the Admin Console.

## App Platform

### ***Invocation replay [No configuration required] [major]***

Invocation replay provides a time-stamped history of instance-specific invocations of your app.

User personas targeted

Developers, Admins

Needs addressed

- Provides greater visibility to app activity
- Speeds troubleshooting by allowing users to view app messaging activity for particular time frames
- Lets developers concentrate on building the core app logic instead of logging functionality

Feature details

Invocation replay is part of the app monitoring feature in the Developer/Admin portal. This feature lets you specify the time period, provides details of each transaction, and provides graphic visualization of messaging traffic.

### ***Enhanced error messages for Career Hub integrations [No configuration required] [minor]***

These enhanced error messages speed up the resolution of technical issues by identifying the systems implicated.

User personas targeted

Developers, Admins

Needs addressed

- Isolates components implicated when technical issues arise
- Helps both Eightfold and third-party engineers avoid unnecessary troubleshooting effort on uninvolved components
- Avoids misconceptions among stakeholders that can arise from imprecise error reporting in any solution with multiple points of integration like Eightfold

Feature details

- Pop up messages appear to users in real time through the Eightfold UI
- Error details are also archived in system logs

### ***Pre-sales app support channel [No configuration required] [minor]***

Visitors to the App Marketplace can now engage subject matter experts from both Eightfold and the app developer by filling in a short form.

#### User personas targeted

- Customers
- Prospects

#### Needs addressed

Gives customers and prospects an app-specific channel to request additional information.

#### Feature details

After selecting an app in App Marketing, on the app detail page, click **Learn more**. Eightfold shares your interest with the app developers and will respond to your questions.



Eightfold.ai® delivers the Talent Intelligence Platform™, the most effective way for companies to retain top performers, upskill and reskill the workforce, recruit top talent efficiently, and reach diversity goals. Eightfold's deep learning artificial intelligence platform empowers enterprises to turn talent management into a competitive advantage.