

employTM

Lever Summer 2024 Release Preview

See what's new in Q2

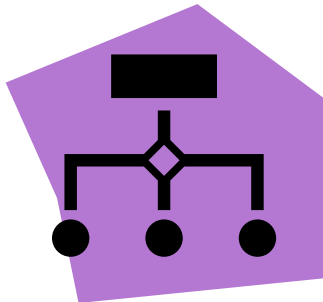


Helpful Resources



Release Notes

Read the details of new features, improvements, and bug fixes. Webinar recording will be posted here when available.




Release Matrix (must be logged in)

A useful overview that allows you to search and filter for release areas of interest and see high-level updates.

LEVER by employ								
Feature	Release	Package	Add-on	Enablement and configuration required	Relevant Roles(s)	Product Area	Description	Help Center Resource
Approval Request Review Page	Aug '24 - Summer Release	LeverTRM for Enterprise	Advanced HR	Automatically enabled	All roles	User Workspace	The Approval Request Review page allows users to see all the relevant information needed to make informed decisions on approval requests from a single page inside of Lever.	Using your User Workspace
Enhanced Data Exports for Visual Insights	Aug '24 - Summer Release	Lever Basic / LeverTRM / LeverTRM for Enterprise		Automatically enabled	Analysts & Reporting Stakeholders, TA Leaders	Visual Insights	You can now customize, filter, and preview your data exports, ensuring you get exactly the information you need.	Visual Insights: Exports
Enhanced API Key Generation	Aug '24 - Summer Release	Lever Basic / LeverTRM / LeverTRM for Enterprise		Automatically enabled	System Administrators	Data API	when developers initiate the key generation process, they now first encounter a checklist to select specific permissions. After selecting permissions, developers can easily view and copy their newly generated API key, making for a more intuitive experience.	Generating and using API keys
Added fields for Data Explorer	Aug '24 - Summer Release	LeverTRM for Enterprise	Advanced Analytics	Automatically enabled	Analysts & Reporting Stakeholders, TA Leaders	Data Explorer	Fields added to the Requisitions, Opportunities, Postings, and Interviews Data Explorer data sets.	Visual Insights Data Explorer
DWS & SDS Schema Updates	Aug '24 - Summer Release	LeverTRM for Enterprise	Advanced Analytics	Automatically enabled	Analysts & Reporting Stakeholders, TA Leaders	Data Explorer	New fields to the DWS schema that will provide more data for analysis.	Data Warehouse Sync
New Integration: Brainer, Inc.	Aug '24 - Summer Release	LeverTRM / LeverTRM for Enterprise		Manually enabled, requires configuration	Recruiters, System Administrators, TA Leaders	Partner Integrations	Brainer is a platform that automates resume screening by using AI to analyze and sort candidates based on recruiter criteria.	Enabling and using the Brainer integration

Analytics Updates

Intelligent Insights



- Enhanced Data Exports for Visual Insights
- Legacy Reporting - Removal of Default Setting
- Additional Fields for Data Explorer
- DWS & SDS Schema Updates

Enhanced Data Exports for Visual Insights

Description

This feature leverages the advanced dashboard capabilities of Looker, already utilized in the Visual Insights Dashboards, to provide a seamless and intuitive interface for filtering and tailoring data prior to export.

User	Business Need	Solution
		
TA Leaders, Admin	Exported reports tailored to specific needs, reducing the need for additional data manipulation, making the process more intuitive and efficient	Enhance decision-making by providing more relevant and actionable insights, saving time, and offering greater control and precision



Before



Home

Candidates

Jobs

Interviews

Referrals

Visual Insights

More

Search candidates /

114

28

Welcome to Visual Insights! | Take me back to legacy reporting

Home

Dashboards

Recently Viewed

Libraries and Sharing

Data Explorer

Exports

Opportunities

EEO/OFCCP

Feedback

Interviews

Job postings

Offers

Referrals

Requisitions

Opportunities data export

Exports opportunity information and pipeline history for every candidate considered in Lever. Each row corresponds to one opportunity. This export contains two files - opportunities and opportunities progress - which include general opportunity information and progress information respectively.

Also includes general opportunities, which are not associated with a specific posting. Candidates will appear in multiple rows if they have multiple opportunities.

GENERATE OPPORTUNITIES CSV EXPORTS

(How to use)

After



Jobs

Interviews

Referrals

Visual Insights

More

Search candidates /

Export Opportunities

just now

Opportunity created (UTC)

Department

Team

Origin

Source

Year To Date

is any value

is any value

is any value

is any value

To export your data from this dashboard, please use one of the following methods:

Preferred Method: We recommend downloading your data by selecting the three-dot ellipsis in the individual dashboard tile and then [Download Data](#). This method provides a wider range of file format options and enables you to download all the data without the [50 result limit](#) on the below dashboard. Choose the 'All Results' option in the 'Advanced data options' drop down of the Download menu to export all the data.

Limited Download: Click the three-dot ellipsis in the top right corner of an entire dashboard and then Download to export as a CSV or PDF. This method does not support exporting all data or additional formats.

Use the three-dot ellipsis here to download data





Export Opportunities

Only the first 50 results are shown

Posting ID	Posting Name	Requisition For Hire ID	Requisition For Hire Code	Is Opportunity Archived	Archive Reason	Archived At (UTC)	Current Stage ID	Current Stage Name	Stage Entered At (UTC)	Hired At (UTC)	Last advance (UTC)	Offered Start Date (UTC)	Is Manual Referral	Snoozed Until (UTC)	Event At (UTC)
U7				No			50e2d4e...	New appl...	2024-06-...		2024-06-...		No		
U7				No			50e2d4e...	New appl...	2024-06-...		2024-06-...		No		
U9				No			50e2d4e...	New appl...	2024-05-...		2024-05-...		No		
U7				No			50e2d4e...	New appl...	2024-05-...		2024-05-...		Yes		
U7	Comission			No			50e2d4e...	New Lead	2024-03-...		2024-03-...		No		
U9				No			50e2d4e...	Phone Sc...	2024-03-...		2024-03-...		No		
Product	Full-time			No			50e2d4e...	New appl...	2024-03-...		2024-03-...		Yes		
				No			50e2d4e...	New Lead	2024-03-...		2024-03-...		No		

Powered by Looker

Using enhanced Data Exports for Visual Insights

Availability	Configuration	Package & User Permission	Additional Notes
			
Summer 2024 Release: Roll-out begins August 6, 2024 Wave release (customers emailed release date)	Automatically enabled (no configuration required)	Lever Basic / LeverTRM / LeverTRM for Enterprise	N/A



Other Intelligent Insights Releases



Additional fields for Data Explorer and DWS schema

Adding more fields to Data Explorer, along with the new fields in the DWS schema, enriches the data available for analysis, enabling deeper and more comprehensive insights into recruitment activities.

→ **Support data-driven decision-making**

New Data Explorer fields added to the following tables:

- Requisitions
- Opportunities
- Postings
- Interviews

New fields added to the posting_forms table in DWS schema:

- account_id
- distribution_external
- distribution_internal
- form_template_id
- posting_form_id
- posting_id
- row_updated_at



Other Intelligent Insights Releases



Visual Insights becomes the only default analytics option

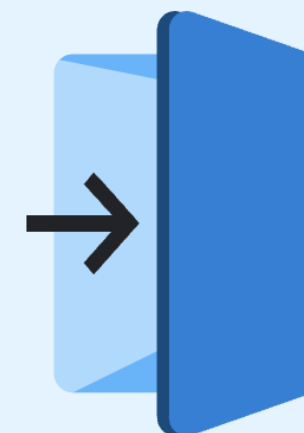
As of June 2024, we've removed the ability to set Legacy Reporting as the default analytics experience.

The transition to Visual Insights ensures that users benefit from more advanced, visually-driven reporting tools, phasing out support for outdated legacy reports by September 25.

→ Facilitate a more intuitive and efficient analysis experience

Available Now

Are you sure you want to go back?



You are navigating back to **legacy reporting**.

Note: Legacy reporting will be decommissioned on September 25, 2024. In preparation for this, we are no longer supporting or maintaining legacy reports. We recommend exploring Visual Insights and the increased visibility and dynamic data visualization it offers. [Learn more in our help article on transitioning to Visual Insights.](#)

GO BACK TO LEGACY REPORTING

STAY ON VISUAL INSIGHTS



[Learn more](#)

ATS Updates

Simplified Workflows



- New Approval Request Review Page and other Approvals Updates
- Compliance Update
- Referrals Update
- Enhanced API Key Generation
- Easy Book Improvements

Approvals Widget on User Workspace

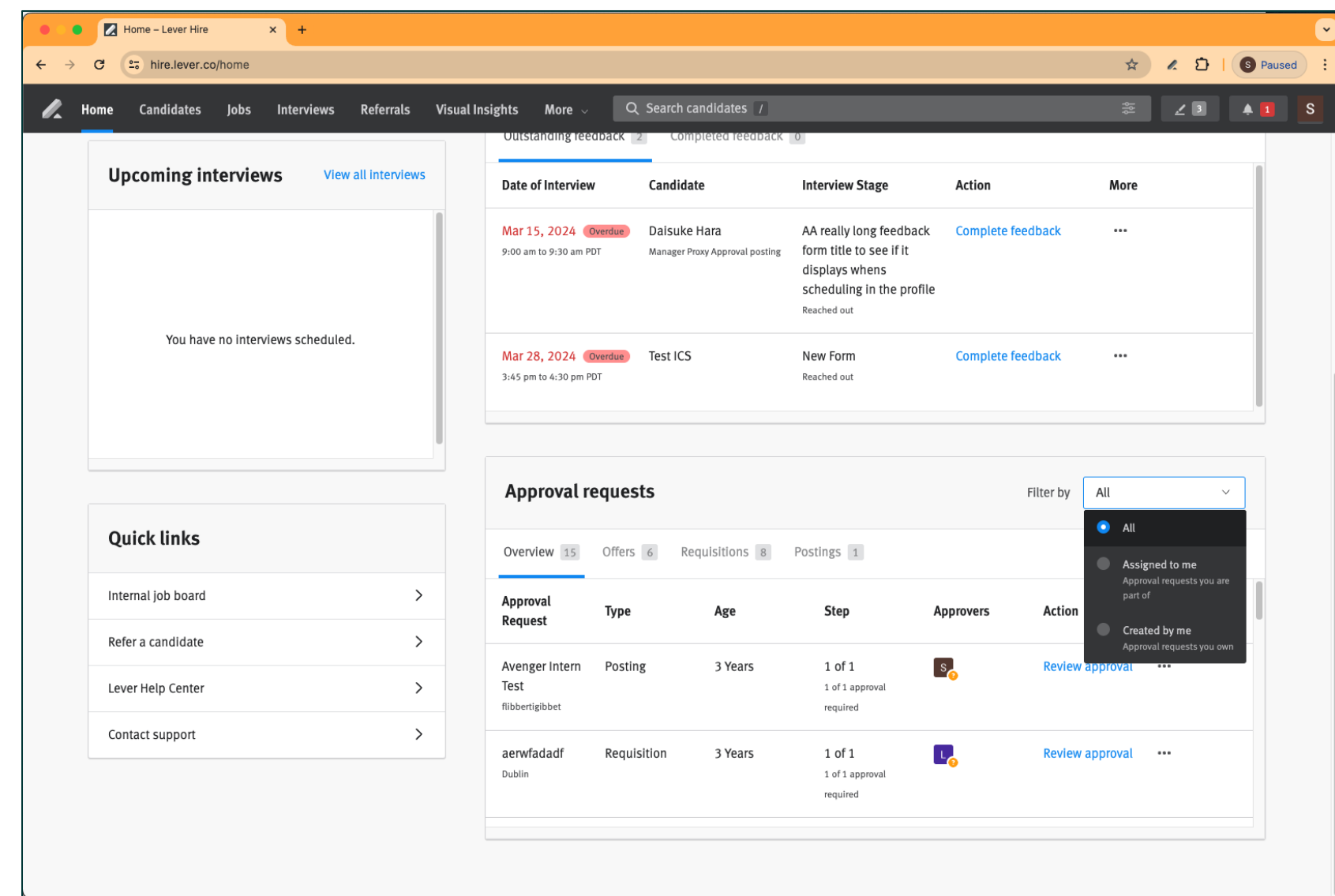


Users can view approval requests assigned to them, in addition to those they have created.

Users can quickly find and address approval requests assigned to them, reducing delays in the hiring workflow. In-app notifications and the ability to filter requests prevent important approvals from being overlooked or lost in inboxes. Easy access to both created and assigned approval requests ensures a smoother and more organized approval process.

- Improve accessibility and visibility within the app
- Minimize delays from overlooked or lost requests
- Smoother and more organized approval process




Available Now



Approval Request Review Page

Description

The Approval Request Review page allows users to see all the relevant information needed to make informed decisions on approval requests in a single, easy-to-use interface.

User	Business Need	Solution
		
Talent Acquisition and Hiring Managers	Eliminate the need for users to navigate through multiple pages, reducing time spent on administrative tasks. Speed up the approval process and minimize the risk of missing or overlooking requests.	Regardless of permissions, users no longer need to rely on email notifications or navigate through multiple pages to complete approvals. This enhancement saves time, simplifies workflows, and ensures the quick and efficient handling of all approval tasks.



Before



Eric McGrath

Morrison & Foerster LLP, Kirkland & Ellis LLP, Cravath, Swaine & Moore LLP

Senior Project Manager

San Francisco, CA, Operations, Project Management, Full-time

OFFER

ARCHIVE

Sourced

Feb 13, 17 10:12 pm

+ Add resume

+ Add file

Owner

Follow

(1)

2+ can access

Created Feb 13, 17 10:12 pm

Approval sent

Apr 27 2022 10:30am

Visible to Super Admins and 0 others

SEE OFFER DETAILS

Coming with Summer
Release

After



HomeCandidatesJobsInterviewsReferralsVisual InsightsMore

Search candidates /

View full approval request

Requisition approval request for Operations Manager

You have permission to make a decision on behalf of team members in this approval request.

Requested byMary Irvin

Date of requestJuly 9, 2024 at 1:45 pm EDT

Requisition Details

Req. code9900045

Headcount1

Comp. band10 - 20 AUD \ per-hour-wage

Req. hiring managerMary Irvin

Req. owner

Location

Commitment

Team

Department

Postings linked

Approval Request

Step 1

Requisition approval request f

Approvers

Jie Lin

Make a decision on

Approve

Don't approve

Approval requests





Filter by

Created by me

Overview5Offers1Requisitions2Postings3

Approval request	Type	Age	Step	Approvers	Action
Mitchell Miller [Opportunity Title]	Offer	2 days	Step 1 of 1 2 of 3 approvals required		Review approval
[Posting Name] [Location / Department]	Posting	1 day	Step 2 of 2 3 of 3 approvals required		Review approval
[Requisition Name] [Location / Department]	Requisition	5 hours	Step 2 of 2 2 of 3 approvals		Review Approval

Using the Approval Request Review Page

Availability	Configuration	Package & User Permission	Additional Notes
			
Summer 2024 Release: Roll-out begins August 6, 2024 Wave release (customers emailed release date)	Approvals must be included and enabled in-app	LeverTRM for Enterprise or Advanced HR Add-on	N/A

Compliance & Candidate Search

Description

Users can generate reports, receive timely notifications, and perform bulk actions

User	Business Need	Solution
		
Recruiters, TA Leaders	Utilizing compliance filters to identify consent status is critical to an organization's ability to remain compliant and engage candidates in a long-term recruiting strategy.	Users with Data Compliance by Location enabled can utilize compliance-related filters, previously only available to those with GDPR enabled. Users can now filter by both Country and Time range simultaneously on the Candidate Data page, rather than choosing between the two.



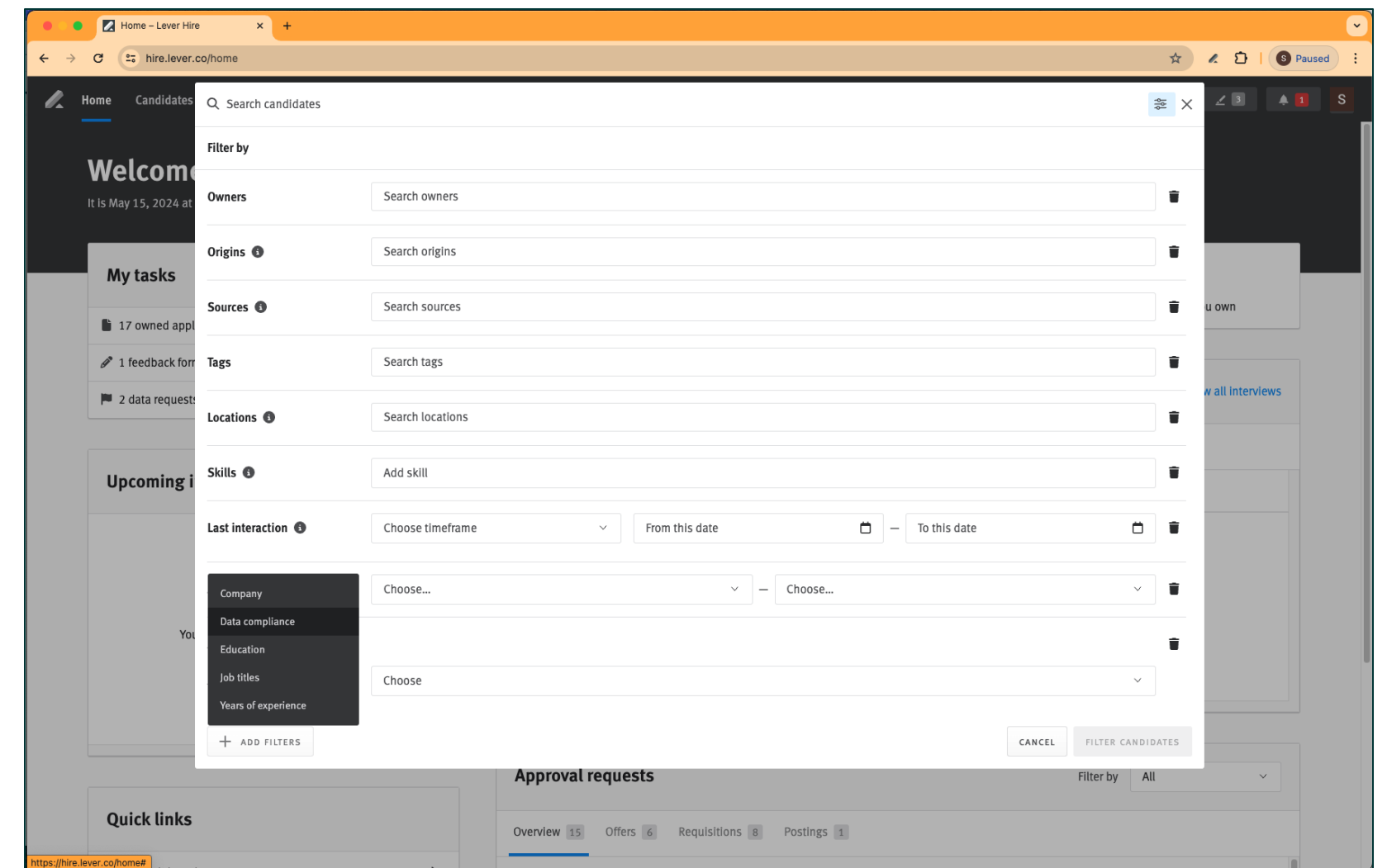
Before







- This functionality was not previously available in the Advanced Search. Users were not able to easily filter candidates that needed updated consent from this view and instead would have to use the Candidate Data page in under Compliance Settings.

Available Now

After



Using Compliance & Candidate Search

Availability	Configuration	Package & Permission	Additional Notes
			
Available now (released in June 2024)	For the new filters to appear on the Candidates page, Data Compliance by Location must be enabled. To enable, user must have the View and edit compliance settings permission.	Lever Basic, LeverTRM, LeverTRM for Enterprise To utilize the new features, user must have access to the Candidates page, which requires the Manage profiles and view associated postings permission.	N/A

Other Simplified Workflows Releases



Referrals Experience Update

The Update to Referrals Experience allows users to automatically copy over complete referral forms when adding a new opportunity to an existing profile.

→ Enhance visibility and efficiency

Available Now

×

Copy information to Solutions Architect

Existing Opportunity Solutions Architect → New Opportunity Solutions Architect

📄 SELECT INFORMATION TO COPY

☒ Resumes
Mark Gomez Resume.pdf

☒ Files ⓘ
MarkGomez.pdf, Mark Gomez.pdf

☒ Origin and Sources
Referred

☒ Referral information
Submitted via referral form by Lever Demo

☒ Tags
UX Designer

Now checking 'Referral Info' will also create a copy of the referral form in this new opp

BACK

CREATE OPPORTUNITY + COPY INFO



[Learn more](#)


Other Simplified Workflows Releases

Set Max Number of Interviews per Day

This feature on the Easy Book Link Creation page enables users to limit the number of interviews an interviewer can conduct per day.

→ Prevent overbooking and balance interviewer schedules

Available Now

 Super Admin × ▼ 🗑️ Remove

Candidates will only see times when Super Admin's calendar is also free. Times are in Pacific Time (GMT -07:00)

<input type="checkbox"/> Sunday	9:00 am	to	5:00 pm	
<input checked="" type="checkbox"/> Monday	9:00 am	to	5:00 pm	+
<input checked="" type="checkbox"/> Tuesday	9:00 am	to	5:00 pm	+
<input checked="" type="checkbox"/> Wednesday	9:00 am	to	5:00 pm	+
<input checked="" type="checkbox"/> Thursday	9:00 am	to	5:00 pm	+
<input checked="" type="checkbox"/> Friday	9:00 am	to	5:00 pm	+
<input type="checkbox"/> Saturday	9:00 am	to	5:00 pm	

☒ Limit maximum number of interviews

4

▼ per day



[Learn more](#)

Other Simplified Workflows Releases

Enhanced API Key Generation

Provide developers with a checklist to select specific permissions during the key generation process.

- Ensure precise control over sensitive data and functionalities

Lever API credentials

These Lever API keys are powerful! They grant access to every piece of data in your account. Keep them confidential. [Read more about how to use Lever's API.](#)

 GENERATE NEW KEY

Permissions

Specify the level of access needed for this API key. We recommend using the most restrictive permissions possible.



Available Now



New Partner Integrations

Explore the entire ecosystem of our partner integrations on the [Lever Partners page](#)

→ Covey



→ Ducknowl



→ HRLogics' Total WOTC



→ OrgChart



→ And more!



Section 05

Deprecations



→ Legacy Reporting

Legacy Reporting Deprecation



- Support for Legacy Reporting has ended
- Legacy Reporting will be removed from Lever on September 25, 2024
- Users should be fully transitioning to Visual Insights to avoid disruptions to their workflow

Learn about Visual Insights

- [Introduction to Visual Insights \(help article\)](#)
- [How to Transition to Visual Insights \(help article\)](#)
- [Visual Insights Knowledge Series \(videos\)](#)
- [HireEd Live Training - Reporting Essentials: Finding and Reviewing your Reports](#)

Other exciting updates



- Employ HireEd
- Lever Release Matrix

Lever Release Matrix

Quickly learn about current (and past) releases

Search and filter for release areas of interest and see high-level updates to the Lever platform and new partner integrations in the Lever Release Matrix (must be logged in to access).

- Filter by release date, product areas, relevant roles, etc.
- Quickly see if a new feature requires in-app configuration or if it is automatically enabled
- System administrators can stay up to date with all the latest features in Lever (matrix updated from beginning of 2024)

LEVERbyemploy								
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Employ HireEd

Employ education is now HireEd!

We are excited to announce the launch of our new learning management system. This unified platform will centralize all Employ product training.


Get streamlined access to on-demand content and live training in one convenient location by signing into https://learn.employinc.com/learners/sign_in

- Clear learning pathways and recommended training content for you
- Easy registration for live training sessions
- Personalized learning dashboards to track process
- Simple navigation and search options
- Plus, new content!

Available Now

Featured Courses


Check out these courses to get started



Explore Employ HireEd for Jobvite

2 minutes
NOT STARTED


Start



Explore Employ HireEd for Lever

2 minutes
100% COMPLETE

View



Getting Started with Jobvite ATS

12 minutes
NOT STARTED

Start

→



General Availability

When can I expect these features in my account?

- Sandbox Preview: July 23, 2024 – August 5, 2024
- General Availability begins: August 6, 2024 - August 16, 2024

How can I learn more?

- [Release Notes](#)
- [Release Matrix \(NEW\)](#)

Where can I get help?

- [Contact Support](#)

employTM

Thank you