



ATS Demonstration Script

Date: August 20, 2021



Introductions

- YES Prep Team
- Demo Team

Product Overview

Please provide a thirty-minute overview of the product, showing the look and feel, navigation, major features and differentiators that make your product a good fit for YES Prep. Be sure to include any optional/ancillary modules (including additional cost not included in your proposal).

End User Facing Processes and Functions

1. Show a sample application and how it is submitted from an applicant perspective (internal and external candidates).
2. Demonstrate/explain the process for a candidate to reset their username and password.
3. Show how candidates can see where his or her application is in the process. Explain/show how emails/texts can be triggered to candidates based on prescribed criteria.
4. Show how communications with candidates are tracked.
5. Explain how requisitions in process are related to one another. Can required documentation be related to more than one application (to eliminate uploading documents for each requisition)?
6. Explain any multilingual functionality.
7. Demonstrate/explain any referral management capabilities, including cross-referencing employee referrals to applications, tracking hires based on referrals, etc.

Talent Team/Management Processes and Functions

8. Recruiting

- a. Show the system's job board and candidate accounts (from the candidate's perspective).
- b. Show job posting capabilities, including the mechanics/steps involved in posting a job.
- c. Discuss/show capabilities around automatically posting to external sites.
- d. Show the application process from an internal/HR team perspective, including how the candidate moves through various stages/statuses.
- e. Demonstrate any screening capabilities, including the ability to group candidates based on screening criteria.
- f. Show any interview scheduling capabilities (virtual job fair, in person interviewing, who has conducted interviews, etc.).
- g. Demonstrate the major processes and capabilities from a hiring manager's perspective.
- h. Show the ability to tag candidates to enhance query/search capabilities.
- i. Show how the system supports maintaining records/pools of candidates who are not hired, but might be considered for future positions.

9. Onboarding

- a. Walk through the onboarding process, including importing a new hire into the ERP/HR Database.
- b. Compensation Offer Process

- c. Show capabilities around an onboarding checklist, including the ability to customize the checklist.
- d. Show how the Talent team can monitor progress toward completing the onboarding checklist.
 - i. Forms tracking and if there is any automation to progress.
- e. Demonstrate the onboarding workflow, including approvals and any notifications that can be triggered (to selected and rejected candidates).
- f. Discuss previous integrations with Tyler Munis; show how a new hire is imported into the ERP/HR database, including what documentation can be imported and any functionality around position control. Discuss YES Prep's role in developing/testing the integration, including what types of technical resources will be needed from the client team.

Super User Processes and Functions

- 10. Custom Application Development
- 11. Demonstrate how to create a custom workflow.
- 12. Show how to create a user defined field, including the ability to associate a drop-down list and make the field required. Explain how reporting/queries interact with UDFs.
- 13. Discuss/demonstrate role-based security:
 - a. Show how to set up a permission level.
 - b. Show how to set up a security group/role.
 - c. Show how to grant groups/roles/individuals security rights.
- 14. Show/demonstrate the system's administrative screens, processes, and functions.
- 15. Show the capability to troubleshoot/provide support by impersonating a candidate.
- 16. Historical data – show us the archive of all communications sent to candidates, application data, and onboarding data for tracking purposes

Automation

- 17. Please highlight any important and/or recommended areas for automation/streamlining processes.
- 18. Explain/show features/functionality available on mobile devices.
- 19. Show any "AI" capabilities for searching applications for prescribed criteria, minimum qualifications, etc. to identify quality candidates within a pool.
- 20. Demonstrate any ranking or scoring capabilities based on established criteria.
- 21. Show how automatic notifications can be generated when a job posting is closed or filled.

Reporting

- 22. Please show/run any canned reports.
- 23. Demonstrate creating a new report from scratch.
- 24. Demonstrate creating a new report from an existing report.
- 25. Show how to share a report with other users.
- 26. Show how a report can be added to a menu.
- 27. Demonstrate scheduling a report to be run/distributed on a prescribed frequency.
- 28. Show how to query the system for specific fields.
- 29. Demonstrate exporting reports and queries to Excel.

- 30. Show any canned dashboards that are available.
- 31. Demonstrate how to create a custom dashboard.

Implementation Methodology

Explain your approach to the following:

- 32. Design/Configuration
- 33. Testing
- 34. Training
- 35. Data Conversion/Migration