

PeopleSoft Talent Acquisition Manager 9.1 PeopleBook

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PeopleSoft Talent Acquisition Manager Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft HCM Application Fundamentals.
- PeopleBooks and the PeopleSoft Online Library.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Talent Acquisition Manager.

PeopleSoft HCM Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft HCM Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Understanding HCM"

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.

- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Getting Started with Talent Acquisition Manager

This chapter discusses:

- Talent Acquisition Manager overview.
- Talent Acquisition Manager integrations.
- Talent Acquisition Manager implementation.

Talent Acquisition Manager Overview

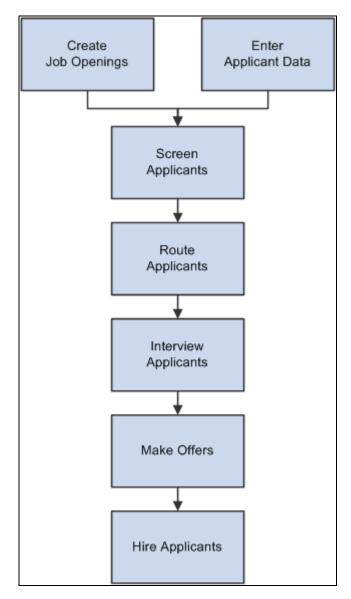
Talent Acquisition Manager is a complete, integrated system that enables organizations to effectively manage workforce acquisition across all employment categories. Whether you have a few resumes to fill hard-to-find positions or you have plenty of resumes but top candidates are scarce, Talent Acquisition Manager is ideally suited to meet your needs in any type of hiring conditions. Streams of applicants can be screened, interviewed, and hired quickly and efficiently.

Primary Recruiting Process Flow

With this application, you can:

- Create and manage job openings.
- Enter and manage applicant information.
- Manage job postings.
- Search for job openings and applicants.
- Screen applicants.
- Route applicants.
- Manage applicant interviews.
- Manage offers.
- Prepare applicants for hire.

This diagram outlines the Talent Acquisition Manager recruitment process flow from the creation of job opening data and applicant data until an applicant is hired:



Talent Acquisition Manager recruitment process for screening, routing, interviewing, and hiring applicants

Additional Recruiting Functionality

In addition to the features that are available to help you manage the recruiting process, you can also:

• Create and manage employee referral programs.

• Use the text catalog to modify much of the text that appears on the applicant facing pages.

The text catalog contains the default text, but you can change the default text as needed. The text catalog enables you to change text for:

- Page titles.
- Page instructions.
- Link titles.
- Group box labels.
- Field labels.

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring the Text Catalog.

• Secure access to data.

Talent Acquisition Manager uses permission lists and roles to control access to menus, components, and pages. It uses row-level security to control access to employee data.

In addition, a user's access to job openings is also determined by association with a job opening through the Assignments group box on the Job Opening page.

To accommodate people that might need to approve job openings or job offers that are outside the business unit, department, or company that is tied to a job opening, Talent Acquisition Manager uses the Recruiting Row Level Security component to give them access.

See <u>Chapter 7, "Setting Up Recruiting Roles and Security," Understanding Row-Level Security for</u> <u>Recruiting, page 99.</u>

Recruiter Alerts and Other Recruiting Pagelets

The HRMS Portal Pack includes portal pagelets that provide access to key data from your recruiting system. The portal pack is intended to supplement the core business applications with pagelets for your portal's homepage, including these recruiting pagelets:

Recruiter Alerts

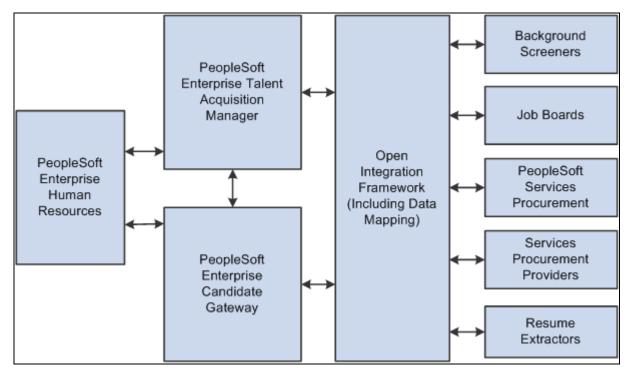
This pagelet provides recruiters with summary information for the recruiters own job openings. For example, there are alerts related to new applicants, interviews and interview evaluations, pending approvals, and expiring job offers.

- My Job Openings
- Find Job Openings
- My Applicants
- Job Openings
- Quick Search

See PeopleSoft HRMS Portal Pack 9.1 PeopleBook, "Using HRMS Portal Pack Pagelets."

Talent Acquisition Manager Integrations

The following diagram shows Talent Acquisition Manager integrations with PeopleSoft Human Resources, PeopleSoft Candidate Gateway, and various external system that integrate using the open integration framework:



Talent Acquisition Manager integrations with PeopleSoft applications and external systems

We discuss integration considerations in the implementation chapters in this PeopleBook.

Supplemental information about third-party application integrations is located on the PeopleSoft My Oracle Support website.

Talent Acquisition Manager Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

PeopleSoft Talent Acquisition Manager also provides component interfaces that help you load data from your existing system into PeopleSoft Talent Acquisition Manager Integrations tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This tables lists components that have component interfaces:

Component	Component Interface	References
HRS_QSTN_SET_DEF	HRS_QSTN_SET_DEF_CI	See <u>Chapter 5</u> , "Setting Up Screening <u>Processes," Setting Up Question Set</u> <u>Definitions, page 69.</u>
HRS_QSTN_DEF	HRS_QSTN_DEF_CI	See <u>Chapter 5, "Setting Up Screening</u> <u>Processes," Setting Up Question</u> <u>Definitions and Default Answer</u> <u>Scores, page 67.</u>
HRS_LOCATION	HRS_LOCATION_CI	See <u>Chapter 8, "Setting Up Additional</u> <u>Recruiting Definitions," Setting Up</u> <u>Recruiting Locations, page 105.</u>

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Understanding HCM"

PeopleTools: PeopleSoft Setup Manager PeopleBook

PeopleTools: PeopleSoft Component Interfaces PeopleBook

Defining Installation Options for Recruiting

This chapter provides an overview of Talent Acquisition Manager setup and discusses how to:

- Activate recruiting applications.
- Set up recruiting installation settings.

Understanding Talent Acquisition Manager Setup

When you implement PeopleSoft Talent Acquisition Manager, you must set up both recruiting-specific definitions and definitions that are shared with other PeopleSoft HCM applications. This overview discusses the categories of information that you set up to support the recruiting process:

- Human Resources foundation tables
- Additional PeopleSoft Human Resources definitions.
- PeopleSoft HCM common definitions.
- Recruiting definitions.

Human Resources Foundation Tables

Recruiting Solutions uses Human Resources (HR) tables to store basic information about your company that is used during recruiting processing. You must set up these tables before you establish any other tables in the system. The HR tables and data used by Recruiting Solutions include (but are not limited to) such elements as business units, companies, departments, job codes and job families, locations, currencies and so forth.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Working with System Data Regulation in HCM"

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Currencies"

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables"

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up Personal Information Foundation Tables"

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up Jobs"

Additional PeopleSoft Human Resource Definitions

Recruiting Solutions relies on data that you set up for these other PeopleSoft HCM applications:

• PeopleSoft HR: Manage Profiles

Use Manage Profiles tables to set up job and applicant attributes (for example, competencies, degrees, or licenses) that matter to the recruiting process.

See PeopleSoft HR 9.1 PeopleBook: Manage Profiles, "Setting Up the Content Catalog."

• PeopleSoft HR: Administer Workforce

Use Administer Workforce tables for contract administration.

See *PeopleSoft HR 9.1 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Tracking Workforce Contracts.

• PeopleSoft HR: Administer Salary Packaging

Use Administer Salary Packaging tables to set up salary package modelling for applicants.

See *PeopleSoft HR 9.1 PeopleBook: Administer Salary Packaging*, "Understanding Administer Salary Packaging."

• PeopleSoft HR: Manage Positions

Use Manage Positions tables for position management.

See *PeopleSoft Enterprise HR 9.1 PeopleBook: Manage Positions*, "Understanding Position Management."

• PeopleSoft HR: Manage Labor Administration

Use Manage Labor Administration tables for works council functionality.

PeopleSoft HCM Common Definitions

Recruiting Solutions uses the following definition tables that are shared by all PeopleSoft HCM applications:

• Approvals

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Approvals."

• Delegations

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Delegation."

Text Catalog

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring the Text Catalog.

Recruiting-Specific Setup

In addition to the completing setup tasks that this chapter discusses, you need to perform these tasks:

• Set up profile integration.

See Chapter 3, "Setting Up Profile Integration," page 25.

• Set up recruiting statuses.

Oracle delivers a complete set of recruiting statuses that you can use.

See Chapter 4, "Setting Up Recruiting Statuses," page 35.

• Set up screening processes.

See Chapter 5, "Setting Up Screening Processes," page 59.

• Set up additional recruiting definitions.

See Chapter 8, "Setting Up Additional Recruiting Definitions," page 105.

• Set up recruiting templates.

See Chapter 9, "Setting Up Recruiting Templates," page 131.

Set up recruitment sources and third-party integrations.
 See <u>Chapter 10</u>, "Setting Up Third Party Integrations," page 177.

Activating Recruiting Applications

To set up implementation defaults, use the Installation Table (INSTALLATION_TBL) component.

This section discusses how to select PeopleSoft applications for your installation.

Page Used to Activate Recruiting Applications

Page Name	Definition Name	Navigation	Usage
Products	INSTALLATION_TBL1	Set Up HRMS, Install, Installation Table, Products	Select the PeopleSoft applications for your installation.

Selecting PeopleSoft Applications for Your Installation

Access the Products page (Set Up HRMS, Install, Installation Table, Products).

Select the check boxes next to Candidate Gateway and Talent Acquisition Mgmt (Talent Acquisition Management).

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HCM," Selecting PeopleSoft Applications for Your Installation.

Setting Up Recruiting Installation Settings

To set up Talent Acquisition Manager implementation defaults, use the Recruiting Installation (HRS_INST) component.

This section discusses how to:

- Define general settings for templates, approvals, and integrations.
- Define job-related settings.
- Define applicant-related settings.
- Select regulatory regions for online job offers.
- Specify starting numbers for system-assigned numbers.

Pages Used to Set Up Talent Acquisition Manager Implementation Defaults

Page Name	Definition Name	Navigation	Usage
Recruiting Installation - General	HRS_INST	Set Up HRMS, Install, Product and Country Specific, Recruiting Installation, General	Define system-wide settings for default recruiting templates, approval processing, and integrations.

Page Name	Definition Name	Navigation	Usage
Recruiting Installation - Jobs	HRS_INST_JOBOPNING	Set Up HRMS, Install, Product and Country Specific, Recruiting Installation, Jobs	Define additional system- wide settings, particularly settings related to job openings.
Recruiting Installation - Applicants	HRS_INST_APPLICANT	Set Up HRMS, Install, Product and Country Specific, Recruiting Installation, Applicants	Define system-wide settings for applicants.
Online Job Offers - Select Regulatory Regions	HRS_ONL_OFR_RG_SEC	Click the Regulatory Regions link on the Recruiting Installation - Applicants page.	Select the regulatory regions where you allow online job offers.
Recruiting Installation - Last Assigned IDs	HRS_INST_CNTRS	Set Up HRMS, Install, Product and Country Specific, Recruiting Installation, Last Assigned IDs	Specify starting numbers for system-assigned numbers. These should be set to a number that does not overlap with existing values in the database or you will get duplicate value errors.

Defining General Settings for Templates, Approvals, and Integrations

Access the Recruiting Installation - General page (Set Up HRMS, Install, Product and Country Specific, Recruiting Installation, General).

General Jobs Applicants	Last Assigned IDs
Template Settings	
*Template Segmenting Type:	Job Family
Default Templates	
Standard Requisition:	Requisition Default
Continuous Job Opening:	Continuous Default Apprv OFF
Interview Evaluation:	Default Interview
Approvals Required	
Standard Requisition	☐ Job Offers
Continuous Job Opening	Optional Works Council
Integration Settings	
*Allow Profile Utilization:	Yes
*Person Profile Integration:	Yes
*Calendar Integration:	Partial 💌

Recruiting Installation - General page

Template Settings

Template Segmenting Type Select a type of data that the system will use to associate specific recruitment templates with specific job openings.

When you set up recruitment templates, you associate them with specific values for the selected segmenting type. For example, if the segmenting type is *Department*, then you can associate different recruitment templates with different departments in your organization. This enables you to vary the job opening data and layout by department.

A field corresponding to the selected segmenting type always appears on the Primary Job Opening Information page, and users are required to enter a value in that field. This enables the system to apply the appropriate recruitment template.

Available segmenting types are:

• Business Unit.

The Primary Job Opening Information page always includes a Business Unit field, even if it is not the segmenting type. The system uses the business unit to filter values for other fields on the page.

- Company.
- Department.
- Job Code.

The Primary Job Opening Information page includes a Job Code field, even if it is not the segmenting type, as long as the Position Management Option on the HRMS Options page is set to *None* or *Partial*.

- Job Family.
- Job Profile.

With this option, users can enter a JOB profile on the Primary Job Opening Information page, and the system imports compatible job profile data into the new job opening.

For purposes of importing job profile data into a job opening, segmentation by job profile functionality is superseded by full profile integration, which you activate by selecting *Yes* in the Allow Profile Utilization field on this page. Although the system does not prevent you from using both options, Oracle does not recommend that configuration.

• Salary Grade.

See <u>Chapter 13, "Creating Job Openings," Entering Primary Job Opening</u> Information, page 242. Standard Requisition and

Continuous Job Opening

Chapter 2

For example, if your job openings are segmented by department (because you entered *Department* in the Template Segmenting Type field on this page), then when you create a job opening, you will enter a specific department. If there is a recruitment template associated with that department, then the system uses the department-specific template to control the content and layout of information on the job opening pages.

If there isn't a department specific recruitment template, then the system uses the appropriate default recruitment template, depending on whether the job opening is a standard requisition or a continuous job opening.

Interview EvaluationSelect the default interview evaluation template.Interview EvaluationThe system uses this template when an applicant is being evaluated and is
not linked to any job opening, or when the job opening's recruitment
template does not include an interview evaluation template.

Approvals Required

This group box is used to activate the two approval processes, JobOpening and JobOffer, used by Talent Acquisition Manager. Approvals are created using the Approval Framework.

See PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Approvals."

Standard Requisition	Select this check box to activate approvals when creating job openings with a type of standard requisition.
Job Offers	Select this check box to activate approvals when creating a job offer.
Continuous Job Opening	Select this check box to activate approvals when creating job openings with a type of continuous job opening.
Optional Works Council	Select this check box to activate approvals when creating job offers requiring works council approval.
	When you select this option, the Works Council Information section appears as an option in the Job Opening Template and Job Opening pages.
	This check box is available for selection only if the Job Offers check box is selected.

Integration Settings	
Allow Profile Utilization	Select <i>Yes</i> to activate profile integration, or select <i>No</i> to disable this integration.
	If profile integration is active, users who create job openings can select up to three profiles whose characteristics will be imported into the newly created job opening.
	If your Template Segmenting Type is <i>Job Profile</i> , then job openings are already configured to import characteristics of a profile that you select when you create the job. If you segment by job profile <i>and</i> you allow profile utilization, then users must select one job profile because of the segmenting rule, and can optionally select up to two more person and non- person profiles (for a total of three) because of the profile utilization setting.
	In this situation, segmenting by job profile serves for template selection, but it does not offer any additional profile capabilities, it only enforces the selection of at least one profile and limits the number of other profiles that can be selected during job opening creation.
	Generally, organizations that allow profile utilization will not also segment by profile.
Person Profile Integration	When profile utilization is not allowed at all, this system sets the value to <i>No</i> and makes the field read-only.
	However, if you allow profile utilization, use this field to determine which types of profiles can be selected when a user creates a job opening. Select <i>Yes</i> to enable users to select both person and non-person profiles, or select <i>No</i> to limit profile selection to non-person profiles.
	Even if users can select person profiles, they can select only person profiles for people to whom they normally have security access (such as direct reports).
Calendar Integration	Select <i>Full</i> to activate integration with Microsoft Outlook 2007. This integration enables recruiters to schedule interviews using Microsoft Outlook meeting requests. This is a two-way integration; the system updates interview data in Talent Acquisition Manager using information from Microsoft Outlook 2007.
	Select <i>Partial</i> to send interview schedules to participants as an iCalendar attachment. The participant can import the iCalendar meeting request and act on it. This is a one-way message, and TAM does not get any response back from the participant.
	Select None if you do not want to use full or partial calendar integration.

Defining Job-Related Settings

Access the Recruiting Installation - Jobs page (Set Up HRMS, Install, Product and Country Specific, Recruiting Installation, Jobs).

<u>G</u> eneral Jobs A <u>p</u> plicants Last	Assigned <u>I</u> Ds		
Job Opening Settings			
*Allow multiple jobs/positions:	No	•	
Randomize Screening Questions:	No	•	
Randomize Screening Answers:	No		
Job Posting Settings			
Max Job Posts per Notification:		20	
Days Available for Latest Postings:	365		
Job Opening Search Autosave and Result Control			
Enforce Search Save:	No	•	
Search Result Limit:	10000		

Recruiting Installation - Jobs page

Job Opening Settings

Allow multiple jobs/positions	Select <i>Yes</i> if you want to allow multiple jobs or positions linked to one job opening, otherwise select <i>No</i> .
	When you select <i>Yes</i> , the Job Code Information group box appears on the Job Opening page.
Randomize Screening Questions	Select <i>Yes</i> if you want applicant questionnaires to present questions in random order, disregarding the questions' order numbers. When an applicant applies for multiple jobs openings, questions from all job openings are randomized together.
	Select <i>No</i> to order questions based on the order numbers specified in the qualifications section of the job opening details (for job-specific screening questions) or in the resume template (for questions when an application is not associated with any job openings).
	Regardless of the value you select, open-ended questions always appear after multiple-choice questions.
Randomize Screening Answers	Select <i>Yes</i> if you want applicant questionnaires to present answers to multiple choice questions (including yes/no questions) in random order.
	Select <i>No</i> to order answers based on their answer ID (which is the order in which they appear in the question definition.)

Posting

Job Posting Settings	
Max Job Posts Per Notification	Enter the maximum number of job postings that can be listed in a Job Agent email notification. If the Job Agent search criteria finds more job postings than are allowed, the email lists as many as are allowed and then appends a message directing the recipient to visit the Careers page to view all search results.
	The maximum value you can enter is 99.
	See <u>Chapter 22, "Managing Applicants," Using the Job Search Agent, page 677.</u>
Days Available for Latest	Enter the number of days that the system looks back when selecting job

Job Opening Search Autosave and Result Control

(USA) Enforce Search Save	Select <i>Yes</i> or <i>No</i> to indicate whether you want the system to force users who are searching for applicants to save their search criteria when a specific job opening is part of the criteria.
	The system forces the save by displaying the Save Search page after the user initiates the search but before the search results appear. The user cannot continue to the results without saving the criteria. The user can, however, cancel to return to the search page without executing the search.
	After a user performs a forced save, the search results appear. Above the search results, the system displays the Save for Compliance button (which normally appears below the search results) along with a message that asks whether the user wants to save the search results for compliance purposes. Although the message and the button remind the user to save the results, the user is not forced to do so.
	Saved searches that are created as a result of this setting retain their association with the job opening. This association means that the searches appear in the Related Searches grid on the Job Opening page: Activity & Attachments tab and in the Saved Searches & Automatches grid on the Job Opening page: Find Applicants tab.
	This functionality supports requirements of the Office of Federal Contract Compliance Programs (OFCCP)
	See <u>Chapter 16, "Searching for Applicants," Understanding Saved</u> <u>Searches, page 423.</u>

postings to include in the Latest Job Postings section of the Candidate

The value that is appropriate for your organization depends on how

lengthy look-back period is not appropriate for a live system.

Note. Be sure to change the default value. The system comes with a very large default value designed to work with the PeopleSoft sample data. This

30 days when selecting job postings to display.

frequently you add job postings.

Gateway Careers page. If the field is empty, Candidate Gateway looks back

Search Result Limit	Enter the maximum number of rows that can appear in the search results when a user searches for applicants using a Verity-based search.
	Important! This setting applies only if you select <i>Yes</i> in the Enforce Search Save field.
	When applicant searches are run directly against the database, PeopleTools limits the results to a maximum of 300. But results from Verity-based searches can be presented in grids with more than 300 rows. In general the maximum number of rows returned for an advanced search will be 500, but if the Enforce Search Save option is active, the maximum number of rows depends on the value you enter in the Search Results Limit field.

Defining Applicant-Related Settings

Access the Recruiting Installation - Applicants page (Set Up HRMS, Install, Product and Country Specific, Recruiting Installation, Applicants).

<u>G</u> eneral <u>J</u> obs Applicants	Last Assigned IDs
Applicant Settings	
Verify Employee ID:	Optional 💌
Verify Person of Interest:	No
Inactive State for Duplicates:	030 Q 030 Inactive
Allow Online Job Offers:	Yes Regulatory Regions
Days Online Offer Valid:	10
Administrator Evaluation Edit:	Yes 💌
Apply Online	
Site ID:	Default Site
Days Job Search Agent Active:	
Maximum Job Agents:	Registration Agreement

Recruiting Installation - Applicants page

Ap	plicant	Settings	
	pilouire	ocungo	

Verify Employee ID	Select whether it is <i>Required</i> or <i>Optional</i> for a recruiter to search the HR database during the Prepare for Hire process to determine whether an applicant was a previous employee, contingent worker, or person of interest for the company. Such searches help prevent duplicate records for the applicant
Verify Person of Interest	Select <i>Yes</i> if you want the system to search the HR database for an existing record when you add an external applicant to the system as a person of interest using the Add Person of Interest action. Such searches help prevent duplicate records for the applicant.
	Select <i>No</i> to let external applicants be added as Persons of Interest without first searching for an existing record.
Inactive State for Duplicates	Select the status that the system will assign to duplicate applicant records that are inactivated during the duplicate merge process. For example, if you merge three records, one record continues to be active, and the other two are assigned the status that you designate in this field.
Allow Online Job Offers	Select <i>Yes</i> to enable online job offer functionality, including the ability to make offer letters and other attachments available in Candidate Gateway and the ability for applicants to accept or reject the offers in the same manner.
	To disallow online job offer functionality, select No.
Regulatory Regions	Click this link, which is only available if the Allow Online Job Offers field value is <i>Yes</i> , to access the Online Job Offers - Select Regulatory Regions page, where you specify which regulatory regions use online job offer functionality.
Days Online Offer Valid	If the Allow Online Job Offers field value is <i>Yes</i> , enter the number of days that an online job offer remains valid. If the applicant has not accepted the job offer within the specified number of days, the offer expires.
Administrator Evaluation Edit	Select <i>Yes</i> or <i>No</i> to indicate whether administrators are allowed to edit, delete, and send back interview evaluations.
	This setting applies only to interview evaluations, not to open-ended question evaluations.

Apply Online

Use this group box to define implementation defaults for PeopleSoft Candidate Gateway.

Site ID	Choose the default site definition that the system uses when you use the delivered navigation to access Candidate Gateway pages. Changing this setting enables you to access and test different site definitions. (Because jobs can be posted to different sites based on the recruitment source definition, changing the default site can also change the job postings that are available on the test sites.)
	A single site definition is associated with both the navigation path for internal applicants (Self-Service, Recruiting Activities, Careers) and the navigation path for external applicants (select Careers under the main menu).
	See <u>Chapter 6, "Setting Up Candidate Gateway Sites," Understanding</u> <u>Candidate Gateway Sites, page 89.</u>
Days Job Search Agent Active	Enter the number of days that an applicant's job search agent is kept in the database.
	The maximum number of days that an applicant's job search agent can stay active is 999. This setting is used by the Job Agent process to determine whether applicants' saved job agents are out of date and should be deleted. If you do not enter a value, the system keeps job agents in the database indefinitely.
Maximum Job Agents	Enter the maximum number of job agents that an applicant can have. The default is five.
Registration Agreement	Select this check box to require external applicants to agree to your registration terms and conditions before they can register for Candidate Gateway. The text of the registration terms comes from the text catalog: to modify the text, update text catalog entry HRAM_CETRMAGRE_03.
	See <u>Chapter 6, "Setting Up Candidate Gateway Sites," Configuring Text on</u> <u>Candidate Gateway Pages, page 93.</u>
	Note. This setting applies only to external applicants who register from the external Careers page.

See Also

Chapter 19, "Making Job Offers," Creating Job Offers, page 529

Chapter 22, "Managing Applicants," Processing Duplicate Applicants, page 665

Chapter 20, "Hiring Applicants," Employee ID Verification, page 565

Chapter 22, "Managing Applicants," Using the Job Search Agent, page 677

Chapter 18, "Interviewing Applicants," Completing Interview Evaluations, page 507

Selecting Regulatory Regions for Online Job Offers

Access the Online Job Offers - Select Regulatory Regions page (click the Regulatory Regions link on the Recruiting Installation - Applicants page).

Online Job Offers - Select Regulatory Regions		
Regulatory Re	egions <u>Customize</u> Pirst I 1-38 of 38 Last	
Include	Regulatory Region	
	Scotland - United Kingdom	
	Wales - United Kingdom	
	Hong Kong	
	HXUSA Regulatory Region	
	India	
	Italy	
	Japan	
	Mexico	
	Malaysia	
	Netherlands	
	New Zealand	
	Republic of Ireland	
	Singapore	
	Thailand	
	United States	
Select All	Deselect All	

Online Job Offers - Select Regulatory Regions page

Include

Select this check box for any regulatory regions where you want to allow online job offers.

The system compares the regulatory region for the job opening with the settings on this page to determine when to enable online job offers.

Specifying Starting Numbers for System-Assigned Numbers

Access the Recruiting Installation - Last Assigned IDs page (Set Up HRMS, Install, Product and Country Specific, Recruiting Installation, Last Assigned IDs).

<u>G</u> eneral <u>J</u> obs Applicants	Last Assigned ID	s	
Job Opening Counters			
Job Opening ID:	503713	Recruiting Location:	1253
JO Screening Summary ID:	1186	Screening Template ID:	2003
Screening ID:	1013	Recruitment Template ID:	2007
Job Opening Posting ID:	1002	Job Opening Template ID:	1008
Team ID:	1004		
Applicant Counters			
Applicant ID:	500185	Last Resume ID Used:	1336
Last Page Layout ID:	88	Correspondence ID:	1004
Last Resume Number:	1000	Resume Template ID:	2007
Duplicate Process ID:	1		

Recruiting Installation - Last Assigned IDs page (1 of 3)

Recruitment Counters			
Answer ID:	1099	Offer ID:	1117
Works Council Decision ID:	1002	Offer Letter ID:	1000
Checklist ID:	1024	Question ID:	1105
Evaluation ID:	1012	Question Set ID:	1023
Interview Category ID:	1001	Recruitment ID:	2237
Interview Rating:	1000	Recruitment Letter ID:	1019
Interview ID:	1115	Recruitment Interview ID:	1030
Interview Letter ID:	1000	Route ID:	1072
Venue ID:	2		
Correspondence Counters			
List ID:	1010	Package ID:	1000
Notes ID:	1030	Contact Method:	1000
Correspondence ID:	1004	Token ID:	1017
Parameter ID:	1000		

Recruiting Installation - Last Assigned IDs page (2 of 3)

Vendor Related Counters			
Integration ID:		Transaction Group ID:	3
Vendor-Transaction ID:		Vendor ID:	
Source ID:	38	SubSource ID:	12
Log ID:		Extractor Log ID:	3
Notification Log ID:		Resolution Log ID:	15
Data mapping ID:		Assigned Mapping ID:	3
Resume Management ID:	206	Resume ID:	
Resume Load ID:		Email Setup ID:	2
Screening ID:	2	Key ID:	1
XSLT ID:		XML ID:	3
External Posting ID:	5	Category ID:	11
Contact ID:	5	Pre-Employment Person ID:	
Log Sequence:	1018		
Other Counters			
Letter ID:	1012	Search ID:	1022
Prepare For Hire ID:	1084		
L			Fix Counters

Recruiting Installation - Last Assigned IDs page (3 of 3)

Identification numbers are system-assigned values that you use to track specific records within the database. These values typically do not require manual assignment unless data conversion has occurred. The system uses these numbers to identify the point at which the system will begin assigning identification numbers for various recruitment records. The system automatically increases the number by one when it assigns a new number and updates this page with the new number.

Fix Counters

Click to synchronize the counter with the actual values in the recruiting database. The system searches for the maximum value being used and resets the counter to that value.

Chapter 3

Setting Up Profile Integration

This chapter provides an overview of profile architecture and discusses how to:

- Choose the primary profile types for recruiting.
- Configure profiles for recruiting.
- Set up profile integration for job openings.

See Also

Chapter 13, "Creating Job Openings," Understanding Profile Integration for Job Openings, page 234

Chapter 15, "Entering Applicant Data," Understanding Profile Information in Job Applications, page 353

Understanding Profile Architecture

Profiles are widely used by organizations to describe the attributes of jobs or individuals. Typically, profiles summarize the competencies, qualifications, and skills of a job or a person. The Manage Profiles business process in PeopleSoft Human Resources provides a framework for developing and managing profiles that meet your industry or organizational requirements.

During the recruitment process, PeopleSoft Talent Acquisition Manager uses profiles to capture job requirements and applicant qualifications.

These are some of the architectural elements for profiles that are relevant to Talent Acquisition Manager:

Profile	An organized collection of data that represents attributes of a person or of a business object such as a job code.
Content Type	A category of information in a profile. Delivered content types that support recruiting processes include competencies, languages, memberships, degrees, licenses & certificates, and so forth.
Content Item	A specific attribute that is associated with a particular content type. For example, for the content type <i>Competencies</i> , content items are specific competencies such as analytical thinking or the ability to prioritize tasks.

Profile TypeProfile types define the structure of your profiles. A profile type includes
content types, but not content items. That is, a particular profile type might
include content types such as competencies and memberships, but it does
not reference particular competencies or particular memberships.The profile type also defines whether the profile is linked to person IDs to
create person profiles, or linked to business entities, such as job code or
positions, to create non-person profiles.

Four profile types are delivered as system data. Use the CLUSTER, ROLE, and JOB profile types to create non-person profiles, and the PERSON profile type to create profiles that describe your employees.

Choosing the Primary Person Profile Type for Recruiting

To set up the primary person profile type for recruiting, use the Assign Default Profile Types (JPM_DFLT_JP_TYPES) component.

This section provides an overview of the primary person profile types and discusses how to set up the primary profile types for recruiting.

Understanding the Primary Person Profile Types

PeopleSoft Talent Acquisition Manager uses profiles to capture job requirements and applicant qualifications. The content types that are available for use in job openings and in applications are those that belong to the system's primary person profile type, as defined on the Assign Profile Defaults page. The delivered primary person profile type is *PERSON*.

Using the primary person profile type ensures that applicant profile data is stored in a format that is compatible with employee profile data and that profile data can follow those applicants who become employees. When your organization analyzes requirements for defining your primary person profile type, be sure that recruiting requirements are considered.

All content types in the primary person profile type are included on the Application Data page, where you enter applicant qualifications. On this page, the fields and layout for content types and items are determined solely by the profile configuration as defined using the Manage Profiles business process; there is no recruiting-specific formatting or configuration involved.

See Chapter 15, "Entering Applicant Data," page 349.

Additional recruiting-specific configuration enables you to use choose which content items to use in job openings, during screening, and for the online application form in Candidate Gateway:

• The Content Section Configuration page controls which content types are available to use in job openings and for screening.

This page also controls the presentation of profile data in job openings and in Candidate Gateway.

• Job opening templates control which of the content types appear on the Job Opening page.

• Resume templates control which of the content types appear to applicants who apply online using Candidate Gateway.

Resume templates can include any content type from the primary person profile type; selection is not limited based on settings on the Content Section Configuration page.

See Also

<u>Chapter 3, "Setting Up Profile Integration," Configuring Profiles for Recruiting, page 28</u> <u>Chapter 9, "Setting Up Recruiting Templates," Setting Up Job Opening Templates, page 150</u>

Chapter 9, "Setting Up Recruiting Templates," Setting Up Resume Templates, page 133

Page Used to Set Up the Primary Person Profile for Recruiting

Page Name	Definition Name	Navigation	Usage
Assign Profile Type Defaults	JPM_DFLT_JP_TYPES	Set Up HRMS, Product Related, Profile Management, Profiles, Assign Default Profile Types, Assign Profile Type Defaults	Identify the primary person profile type for the system. This person profile type provides the structure for applicant and job opening qualifications in Talent Acquisition Manager.

Setting Up the Primary Profile Types for Recruiting

Access the Assign Profile Type Defaults page (Set Up HRMS, Product Related, Profile Management, Profiles, Assign Default Profile Types, Assign Profile Type Defaults).

Assign Profile Type Defaults			
*Primary Person Profile Type:	PERSON	Q	Person
*Primary NonPerson Profile Type:	JOB	Q	Job

Assign Profile Type Defaults page

Primary Person Profile Type	Enter the primary person profile type. This is a system-wide setting that is used throughout PeopleSoft Human Resources. In Talent Acquisition Manager, the primary person profile type determines the content types that are available for use in job openings and in applications.
	The delivered primary person profile type is <i>PERSON</i> .
	See <i>PeopleSoft HR 9.1 PeopleBook: Manage Profiles</i> , "Setting Up Profile Management," Assigning Profile Type Defaults.
Primary NonPerson Profile Type	Talent Acquisition Manager does not use the system's primary nonperson profile type.

Configuring Profiles for Recruiting

To configure profiles for recruiting, use the Content Section Configuration (HRS_JPM_SECT_CFG) component.

This section provides an overview of content type configuration for recruiting and discusses how to configure profiles for recruiting use.

Understanding Content Type Configuration for Recruiting

Profiles types that you create using PeopleSoft Human Resources are used by multiple PeopleSoft applications. To cater to all applications, the primary person profile type may contain content types that you do not want to use for recruiting. Also, the content types that you do use often include properties (fields) that are not relevant to the recruiting process.

To select which content types to use, and how to use specific content type properties, use the Content Section Configuration page to enter recruiting-specific configuration options for each content type in the primary person profile type.

Data Integrity Considerations

Changes to the content type definition in the Manage Profiles module can cause data integrity issues in Talent Acquisition Manager. Be sure to finalize your profile and content type configuration before performing the additional profile configuration for Talent Acquisition Manager.

Preventing Duplicates After Changing the Primary Person Profile Type

If you change the primary person profile type, the Content Section Configuration page will initially store duplicate entries for content types: one entry is associated with the previous primary person profile type, and one is associated with the new primary person profile type.

To correct this situation, access every Content Section Configuration entry and save it. (It is not necessary to make change before saving.) The save process cleans up the duplicate records.

Page Used to Configure Profiles for Recruiting Use

Page Name	Definition Name	Navigation	Usage
Content Section Configuration – <content Type></content 	HRS_JPM_SECT_CFG	Set Up HRMS, Product Related, Recruiting, Templates, Content Section Configuration, <content Type></content 	Configure profile content types for use in Talent Acquisition Manager.

Configuring Profiles for Recruiting Use

Access the Content Section Configuration – <Content Type> page (Set Up HRMS, Product Related, Recruiting, Templates, Content Section Configuration, <Content Type>).

The search dialog for this page enables you to access content types from the primary person profile type. You cannot add additional content types using this page.

Note. The page title changes according to the content type that you are configuring.

Licenses & Certific	ations					
Status Date: 01/01/1900	Applicant ma	ay add items	6			
Properties			<u>Customiz</u>	<u>e Find</u> 🗖	First 🛙	1-10 of 10 🗖 Last
Field Name	Label Text	Required	Summary	Detail	Use in Screening	Default
JPM_CAT_ITEM_ID	License	V			▼	
JPM_CAT_TYPE	Content Type	V				
COUNTRY	Country					
STATE	State					
JPM_YN_1	Renewal Required					
JPM_YN_2	Renewal In Progress			•		
JPM_YN_3	License Verified			•		
JPM_DATE_3	Expiration Date					
JPM_TEXT254_2	License/Certification Number			v		
JPM_TEXT254_4	Issued By	Γ				

Content Section Configuration – <Content Type> page

Applicant may add itemsSelect this check box to indicate that Candidate Gateway will allow
applicants to add content items to their applications. Deselect this check
box if applicants can modify the details for the content items that are part of
the job opening, but not add new ones.

For example, you may want applicants to provide proficiency ratings for specific competencies, but you do not want applicants to add additional competencies that you do not consider relevant to the recruiting process. Because this check box is selected for the Competencies content type, the competencies that you associate with the job opening appear in the Candidate Gateway application form, and applicants can rate themselves for those competencies, but they cannot add any additional competencies.

Note. When the system loads content items from a job opening into the Candidate Gateway application form, it loads only items that are visible to employees. For example, if a Job Opening has four competencies, and the first two have the evaluation type *Self* and the last two have the evaluation type *Official*, only the first two items appear in the Candidate Gateway online application form.

If this check box is deselected, the Summary check box is automatically selected and greyed out for all required fields, and the detail check box column is hidden for all fields. You can select the Summary check box for any additional properties that the applicant needs to supply. Because the applicant cannot add content items, the system does not provide the applicant with access to the corresponding detail page, and the only opportunity for data entry is within the summary grid.

If this check box is deselected, this content type is included when you use the Copy Limited Items from Job Opening button on the Application Data page. That button copies content items from job openings into job applications.

For example, the delivered content type configuration for competencies prevents applicants from adding competencies to their applications. The assumption is that you want to rate applicants on specific job-related competencies that you have defined in the job opening. To facilitate data entry on the Applicant Data page, and to ensure that you rate applicants on the correct set of competencies, you click the Copy Limited Items from Job Opening button. If there are any competencies that are associated with the job openings listed in the application, the system copies those competencies to the application so that you can enter applicant-specific ratings.

Properties

This grid lists all the properties (fields) for the content type. Content type properties are defined using the Manage Profiles module in PeopleSoft Human Resources.

Field Name and **Label Text** These fields identify a specific field that is part of the content type definition. For example, the content type Competencies, which you use for applicant competency ratings, includes fields such as Rating Model and Proficiency.

Required	If this check box is selected, the property is required. Otherwise, it is optional. For example, in the Degrees content type, the degree itself is a required property, while additional properties such as the school code are optional. This check box is read-only; this setting comes from the content type definition in the Manage Profiles module.
Summary and Details	Select the Summary check box to include the property as a column in the grid that represents this content type.Select the Details check box to include the property on the detail page for this content type. This check box is not available when the Applicant may add items check box is deselected.These settings affects the grids and detail pages on the Job Opening page and on the job application form (the Complete Application page) in Candidate Gateway. They do <i>not</i> affect the grids on the Application Data
Use In Screening	Select this check box to make the field available for screening. Fields where this check box is selected are included in the criteria list on the Job Opening Screening Criteria page, where you choose which of the available criteria to use in a specific screening level. Each selected item is treated as a separate screening item, and users must set up screening scoring bearing in mind the interrelationships between items.
	For example, the delivered configuration for the Competencies content type has only one field that is available for screening: the proficiency field. When you add a competency to a job opening, you will enter data such as the competency name, rating type, and the rating. But when you configure the screening criteria for the job opening, the rating is the only competency- related information that is listed in the grid where you select screening criteria. (Because the rating is associated with a particular competency, rating model, and evaluation type, the screening process automatically looks for a rating for the associated competency, rating model, and evaluation type).
	If you were to change the configuration for competencies so that the competency name was the only field used in screening, then the screening process would simply check that the applicant's application lists the competency, regardless of the applicant's rating.
	Only certain fields are available for selection, including the content item ID (JPM_CAT_ITEM_ID for regular content types and JPM_ADHOC_DESCR for ad hoc content types), rating-related fields (JPM_RATING1 through JPM_RATING3), and yes/no indicators (JPM_YN_1 through JPM_YN_5).
Default	Displays the default value for the property.

Setting Up Profile Integration for Job Openings

To set up profile integration for job openings, use the Recruiting Installation (HRS_INST) and Configure Direct Reports UI (HR_DR_UI_CFG) components.

This section provides an overview of set up for profile integration for job openings and lists the pages used to set up profile integration for job openings.

Understanding Set Up for Profile Integration for Job Openings

This overview describes certain setup tasks for job opening profile integration.

Integration Activation

When creating job openings, you can automatically populate the profile-based job qualifications with content items from selected profiles. For example, when replacing a key employee, you can copy attributes such as competencies and languages from the employee's profile into the job opening. Similarly, you can pull requirements from a job profile. You can even combine requirement sources by selecting up to three profiles from which to load requirements.

Use the Recruiting Installation - General page to activate profile integration for job openings and to choose whether to allow the use of person profiles in addition to non-person profiles.

Person Profile Security for Job Openings

If you use full profile integration, including integration with person profiles, users who are creating job openings can select person profiles whose content types are to be copied into the job opening. This ability is dependent on the user's security settings.

The system applies standard row-level security to ensure that users don't select profiles for employees that they are not authorized to view.

Users with the *Profile Mgmt Manager* role in their User Profile are authorized to view profiles for themselves and for their direct reports. To support this authorization, you must configure direct report access for the job opening component (HRS_JOB_OPENING)

Important! The direct report configuration for the HRS_JOB_OPENING component must exactly match the configuration for the JPM_PERS_PTSEL_MGR component, as direct reports processing for profiles within the job opening component must mirror that of the manager self-service for person profiles.

Pages Used to Set Up Profile Integration for Job Openings

Page Name	Definition Name	Navigation	Usage
Recruiting Installation - General	HRS_INST	Set Up HRMS, Install, Product and Country Specific, Recruiting Installation, General	Activate profile integration for job openings, and set up other system-wide recruiting settings. The option to activate person profile integration is available only after nonperson profile integration is activated. See <u>Chapter 2, "Defining</u> <u>Installation Options for</u> <u>Recruiting," Defining</u> <u>General Settings for</u> <u>Templates, Approvals, and</u> <u>Integrations, page 11.</u>
Configure Direct Reports UI	HR_DR_UI_CFG_1	Set Up HRMS, Common Definitions, Direct Reports for Managers, Configure Direct Reports UI, Configure Direct Reports UI	Configure direct reports for the HRS_JOB_OPENING component. See <i>PeopleSoft HCM 9.1</i> <i>Application Fundamentals</i> <i>PeopleBook</i> , "Setting Up and Working with Self- Service Transactions," Setting Up Access to Direct Reports Data.

Chapter 4

Setting Up Recruiting Statuses

This chapter provides overviews of recruiting statuses and of delivered status configuration. It then discusses how to set up recruiting statuses.

Understanding Recruiting Statuses

This section provides overviews of:

- Recruiting status areas.
- Recruiting status setup

Recruiting Status Areas

Recruiting statuses help a recruiter identify the circumstances of an applicant and job opening.

The Six Status Areas

PeopleSoft Talent Acquisition Manager has six areas (known as recruitment areas) in which statuses are tracked:

1. Job Openings: helps identify where to focus efforts regarding a job opening.

For example, the job opening status can indicate whether a job opening is *Pending Approval, Open,* or *Filled/Closed.*

2. Applicants: helps identify who to act on, and what actions to take.

For example, the applicant status can indicate whether the applicant is Active, Inactive, or Hired.

3. Recruitment Summary: indicates an applicant's overall status with regards to a particular job opening.

For example, the recruitment summary status, or *disposition*, can indicate that an applicant has *Applied*, been *Screened*, been *Interviewed*, received an *Offer*, or been *Hired* or *Rejected*.

Although the disposition is specific to a single job opening, applicants can also apply without identifying any job openings. The "no job selected" application is still considered a job opening and has its own disposition.

Important! On recruiting pages, the status in this area is called the applicant's disposition.

- 4. Route: indicates the options for further steps to take for an applicant after screening or other preliminary assessment.
- 5. Interview: identifies the progress of an applicant within the interview stage and the options for further steps to take for the applicant.
- 6. Offer: identifies the progress of an applicant within the offer stage.

Status codes within the recruiting areas provide a convenient way to assign consistent business rules to your recruiting activities. When you define status codes, you can also define *status change effects* so that a status change in one recruitment area can affect the status in another recruiting area. This cascading effect relieves you of the responsibility for managing some of your recruiting processes.

For example, when you hire an applicant into a job opening, you can set the status of the applicant to *Hired*, the status of the job opening to *Filled/Closed*, the dispositions of all other applicants for that job opening to *Reject - Another Applicant Was Hired*, and the hired applicant's disposition with regards to any other job openings to *Reject - Selected for Other Position*.

Note. Although the Route, Interview, and Offer status areas might seem to be sub-statuses for the *Route, Interview,* and *Offer* dispositions, it is important to understand that these are separate status areas. Any relationship between them and the applicant's disposition is a result of status change effects.

The Route and Interview Status Areas

The Route and Interview status areas serve a slightly different purpose than the other status areas.

For example, consider the delivered statuses for the Interview area: *Interview, Make Offer, Hold, Reject,* and *Withdrawn.* These do not suggest the stages of the interview process (which might be more like scheduled, cancelled, and complete). Rather, these statuses indicate the beginning of the process (*Interview*) and then the possible next steps that you might want to take when the interview takes place.

When managing an applicant's interview, the interview statuses are used in two ways. First, the statuses are available in the interview evaluation form, where interviewers select a status to indicate what action they recommend. Recommending a status does not update the status, it simply provides feedback to the recruiter who eventually does update the status. Second, the statuses are available as choices when the recruiter selects a final recommendation after all interviews are complete. When the recruiter selects a final recommendation, status change effects update the applicant's disposition accordingly. For example, if the final recommendation (and thus the final interview status) for the applicant is *Reject*, and if you use the delivered status change effects, the system updates the applicant's disposition to *Reject*

The Route status area works the same way. The delivered statuses are *Routed*, *Invite for Interview*, *Hold*, *Reject*, and *Withdrawn*. The recruiter sends out a request for routing recommendations, the recipients of that request recommend one of the statuses, the recruiter selects a final routing status, and status change processing in turn updates the applicant's disposition.

See Chapter 17, "Screening and Routing Applicants," Routing Applicants, page 473.

Recruiting Status Setup

To set up recruiting statuses:

1. Use the Statuses and Reasons Code page to define status codes and associated reasons for each of the six recruitment areas.

- 2. Use the Status Area page and its secondary pages to define:
 - a. The default status that is used for a new (or newly approved) records in each status area.
 - b. Which statuses trigger notifications when they are used.
 - c. The status progression within each recruitment area.
 - d. How applying a particular status in one area can trigger additional status change effects in the same or different areas.

Note. The system includes a comprehensive set of codes and associated status processing rules. Oracle recommends that you use these delivered statuses and rules rather than setting up your own.

Default Statuses

The system applies different default statuses at different stages:

Processing Stage	Details
Draft	• For the Job Opening, Recruitment Summary (disposition), and Job Offer areas, the status definitions on the Statuses and Reasons page include a check box that you use to identify a draft status.
	The system uses the draft status as the default status when a new job opening, application, or offer is saved for later without being submitted.
	• The Applicant and Route status areas do not differentiate between saving for later and submitting, so they do not have a draft status.
	• The Interview status area does allow users to save for later without submitting, but in this area, records that are saved for later simply do not have a status.
Pending Approval	For the Job Opening and Job Offer areas, the status definitions on the Statuses and Reasons page include a check box that you use to designate the default approval status. This represents records that have been submitted but are pending approval, so if approvals are active, the system applies this status to newly submitted records.
Approval Denied	For the Job Opening and Job Offer areas, the status definitions on the Statuses and Reasons page include a check box that you use to designate the approval denied status, and the system applies this status after an approver denies approval.
Open	For all status areas, the Status Area page includes a check box that you use to designate the default open status. This is applied to records after they are submitted and, if approvals are active, approved.

Status Progression

For each status code, you can define the progression from one status code to another by indicating the statuses that typically occur after the current status.

For example, the next status for a job opening with a status of Open might be Hold, Filled/Closed, or Canceled.

If a user manually updates the status to one that is not configured as a successor, the system displays a warning. The user can choose to ignore the warning and save the new status anyway.

Effect of Status Changes

When the status of an applicant, job opening, or application changes, this can affect the status of other records.

For example, when a recruiter decides to hire an applicant, this affects the Recruitment Summary status of other applicants and affects the job opening status. The following table explains the delivered rules for the Hire status.

Recruitment Area	Records Affected	Impact
Recruitment Summary	Hired applicant	Set status to <i>Hired</i> for the selected job opening.
Recruitment Summary	Hired applicant's other applications	If the hired applicant is linked to other job openings, set the Recruitment Summary status for those applications to <i>Reject</i> and reason code to <i>Selected for Another</i> <i>Position.</i>
Recruitment Summary	Other applicants for the job opening	If all the openings for the job opening are filled, set the Recruitment Summary status to <i>Reject</i> and reason code to <i>Another</i> <i>Applicant was Hired</i> .
Job Opening	Job Opening	If all the openings are filled, set the Job Opening Status to <i>Filled/Closed</i> .

Note. This table shows the delivered rules, which we recommend that you use. However, you can adjust the status codes and rules to suit your organization.

There are restrictions on the changes allowed. Changing an applicant's status to *Inactive*, for example, doesn't have an impact on the status of a job requisition. However, it does have an impact on the status of the applicant's open applications. The following example illustrates how status values in each recruitment area impact statuses in other recruitment areas.

You define the rules for changing status values on the Effects of Status Change page.

For each rule, you define:

- Recruitment area affected.
- The records within the recruitment area that are affected by the status change.
- The new status and reason code that the system applies to those affected records.

Here is an example of the Effects of Status Change page for the Hired status.

Effects of Status	Change			
Recruitment Area:	3-Summary	1		
Description:	090 Hired			
Status Changes			Find Viev	<u>w All</u> First 🗹 1 of 4 🕨 Last
*Recruitment Area:	Job Openin	g	•	+ -
New Status:	110 Filled/C	losed	•	
New Reason:			•	
	Revert to	Last Status / Rea	ison	
Apply To		<u>Customi</u> :	ze Find View All 🗖 🛗	First 🚺 1-2 of 2 🕨 Last
Status		All Reasons	Specific Reason	
010 Open	•			• • -
100 Hold	•	~		• + -
OK Cancel				

Example of the Effects of Status Change page

In this example, when an applicant's application is set to 090 Hired, the following rule is applied:

- The recruitment area that is affected is *Job Opening*.
- The new status that the system applies is 110 Filled/closed.

Note. This example shows only one of the delivered rules for the Hired status. The Hired status has other rules that you access by clicking the navigation buttons.

Understanding the Delivered Status Configuration

This section provides overviews of:

- Delivered status codes and reasons.
- Delivered status change effects.
- Hard-coded status processing.

Delivered Status Codes and Reasons

Recruitment Area	Status Code	Table
Job Opening	Draft	HRS_JOB_OPENING
	Pending Approval	
	Denied	
	Open	
	Hold	
	Filled/Closed	
	Canceled	
Applicant	Active	HRS_APPLICANT
	Hired	
	Inactive	
	Queued	

The following table identifies the statuses that are delivered with the system:

Recruitment Area	Status Code	Table
Recruitment Summary	Draft	HRS_RCMNT
	Review	
	Linked	
	Linked Questionnaire	
	Applied	
	Screen	
	Route	
	Interview	
	Preliminary Offer Decided	
	Offer	
	Offer Accepted	
	Preliminary Offer Notified	
	Preliminary Offer Accepted	
	Preliminary Offer Rejected	
	Hire Decided	
	Ready to Hire	
	Hired	
	Hold	
	Reject	
	Failed Prescreening	
	Reject Online Screening	
	Withdrawn	
	Inactive	
Route	Routed	HRS_APP_RTE
	Invite for Interview	
	Hold	
	Reject	
	Withdrawn	
Interview	Interview	HRS_RCM_INT
	Make Offer	
	Hold	
	Reject	
	Withdrawn	

Recruitment Area	Status Code	Table
Offer	Draft	HRS_OFFER
	Pending Approval	
	Denied	
	Extend	
	Accept	
	Acceptance Withdrawn	
	Hold	
	Offer Rejected	
	Offer Withdrawn	

Delivered Status Change Effects

The following tables summarizes the effects of status changes in each recruitment area.

Job Opening Status Change Effects

This table lists the delivered effects of status changes in the Job Opening recruitment area.

<i>If the Job Opening status is changed to:</i>	Then look in this recruitment area:	For statuses equal to:	And change the status - reason to:
Open	Recruitment Summary	Hold	Last Status - Reason
Hold	Recruitment Summary	Review Linked Applied Screen Route Interview Offer	Hold
Filled/Closed	Recruitment Summary	Review Linked Applied Screen Route Interview Offer Hold	Reject - Another Applicant was Hired

If the Job Opening status is changed to:	Then look in this recruitment area:	For statuses equal to:	And change the status - reason to:
Canceled	Recruitment Summary	Review	Reject - Job Opening
		Linked	Cancelled
		Applied	
		Screen	
		Route	
		Interview	
		Offer	
		Hold	

Applicant Status Change Effects

This table lists the delivered effects of status changes in the Applicant recruitment area.

<i>If the Applicant status is changed to:</i>	Then look in this recruitment area:	For statuses equal to:	And change the status - reason to:
Inactive	Recruitment Summary for	Review	Withdrawn
	other positions	Linked	
		Applied	
		Screen	
		Route	
		Interview	
		Offer	
		Hold	

Recruitment Summary Status Change Effects

This table lists the delivered effects of status changes in the Recruitment Summary recruitment area.

<i>If the Recruitment Summary status is changed to:</i>	Then look in this recruitment area:	For statuses equal to:	And change the status - reason to:
Offer	Offer	Hold	Last Status - Reason
Offer Accepted	Offer	Hold	Last Status - Reason
Hired	Job Opening	Open Hold	Filled/Closed
Hired	Applicant	Active	Hired

<i>If the Recruitment Summary status is changed to:</i>	Then look in this recruitment area:	For statuses equal to:	And change the status - reason to:
Hired	Recruitment Summary for	Review	Reject - Selected for Other
	current applicant and other job openings	Linked	Position
	J. T. B.	Applied	
		Screen	
		Route	
		Interview	
		Offer	
		Ready to Hire	
		Hold	
Hired	Recruitment Summary for	Review	Reject - Another Applicant
	other applicants and current job opening.	Linked	was Hired
	job opening.	Applied	
		Screen	
		Route Interview Offer	
		Hold	Hold
Hold	Route	Routed	Hold
		Invite for Interview	
Reject	Route	Routed	Reject
		Hold	
Reject	Interview	Interview	Reject
		Hold	
Reject	Offer	Extend	Offer Rejected
		Hold	
Withdrawn	Route	Routed	Withdrawn
Withdrawn	Interview	Interview	Withdrawn
		Hold	
Withdrawn	Offer	Extend	Offer Withdrawn
		Hold	

Route Status Change Effects

This table lists the delivered effects of status changes in the Route recruitment area.

<i>If the Route status is changed to:</i>	Then look in this recruitment area:	For statuses equal to:	And change the status - reason to:
Routed	Recruitment Summary for	Review	Route
	current applicant and job opening	Linked	
		Applied	
		Screen	
		Hold	
Invite for Interview	Recruitment Summary for	Review	Route
	current applicant and job opening	Linked	
	opening .	Applied	
		Screen	
		Hold	
Hold	Recruitment Summary for	Review	Hold
	current applicant and job opening	Linked	
	opening	Applied	
		Screen	Reject
		Route	
Reject	Recruitment Summary for	Review	Reject
	current applicant and job opening	Linked	
	opening .	Applied	
		Screen	
		Route	
		Hold	
Withdrawn	Recruitment Summary for	Review	Withdrawn
	current applicant and job opening	Linked	
	-r8	Applied	
		Screen	
		Hold	

Interview Status Change Effects

This table lists the delivered effects of status changes in the Interview recruitment area.

<i>If the Interview status is changed to:</i>	Then look in this recruitment area:	For statuses equal to:	And change the status - reason to:
Interview	Recruitment Summary for current applicant and job opening	Review Linked Applied Screen Route Hold	Interview
Make Offer	Recruitment Summary for current applicant and job opening	Review Linked Applied Screen Route Hold	Interview
Hold	Recruitment Summary for current applicant and job opening	Review Linked Applied Screen Route Interview	Hold
Reject	Recruitment Summary for current applicant and job opening	Review Linked Applied Screen Route Interview Hold	Reject
Withdrawn	Recruitment Summary for current applicant and job opening	Review Linked Applied Screen Route Interview Hold	Withdrawn

Offer Status Change Effects

This table lists the delivered effects of status changes in the Offer recruitment area.

<i>If the Offer status is changed to:</i>	Then look in this recruitment area:	For statuses equal to:	And change the status - reason to:
Extend	Recruitment Summary for current applicant and job opening	Review	Offer
		Linked	
		Applied	
		Screen	
		Route	
		Interview	
		Hold	
		Reject - Offer rejected	
Accept	Recruitment Summary for current applicant and job opening	Review	Offer Accepted
		Linked	
		Applied	
		Screen	
		Route	
		Interview	
		Offer	
		Hold	
Accept	Recruitment Summary for current applicant and other job openings	Review	Hold
		Linked	
		Applied	
		Screen	
		Route	
		Interview	
		Offer	
Accept	Recruitment Summary for other applicants for the current job opening	Review	Hold
		Linked	
		Applied	
		Screen	
		Route	
		Interview	
		Offer	

<i>If the Offer status is changed to:</i>	Then look in this recruitment area:	For statuses equal to:	And change the status - reason to:
Acceptance Withdrawn	Recruitment Summary for current applicant and job opening	Review	Offer
		Linked	
		Applied	
		Screen	
		Route	
		Interview	
		Ready to Hire	
		Hold	
Acceptance Withdrawn	Recruitment Summary for current applicant and other job openings	Hold	Last Status - Reason
Acceptance Withdrawn	Recruitment Summary for other applicants for the current job opening	Hold	Last Status - Reason
Offer Rejected	Recruitment Summary for current applicant and job opening	Review	Reject - Offer Rejected
		Linked	
		Applied	
		Screen	
		Route	
		Interview	
		Offer	
		Hold	
Offer Withdrawn	Recruitment Summary for current applicant and job opening	Review	Withdrawn
		Linked	
		Applied	
		Screen	
		Route	
		Interview	
		Offer	
		Hold	

Hard-Coded Status Processing

If you modify the delivered status configuration, be aware that certain actions have hard-coded references to particular status codes, and design your status system accordingly.

For example, in the Recruitment Summary area, the Reject Applicant action always applies status code 110. Therefore, using that code for any status other than Reject will invalidate the Reject Application action.

Recruitment Summary Statuses

Here is a list of situations where the system invokes specific status codes for the recruitment summary (disposition) area. The delivered value for each status code is noted in parentheses.

- The Link Application to Job action has a hard coded default disposition of 015 (Linked), but users can override the default.
- The Link Applicant to Job Opening action displays a warning if you assign a disposition other than 019 (Linked Questionnaire) when linking an applicant to a job opening that has a questionnaire.

The same warning appears if a user assign disposition 019 to a job opening that does not have questionnaire.

- The Prepare for Hire action is available only if the disposition is 071 (Offer Accepted).
- The Prepare for Hire action always applies disposition 080 (Ready for Hire)
- The Withdraw from Hire action is available only if the applicant's current disposition is 080 (Ready for Hire), and performing the Withdraw from Hire action always applies status 120 (Withdrawn)
- The post-hire message from the Human Resources system sets the disposition to 090 (Hired)
- The Copy Applicant to Employee action is available only if the disposition is 090 (Hired)
- The Reject Applicant action always applies disposition 110 (Reject)

Job Opening Statuses

Here is a list of situations where the system invokes specific status codes for the job opening status area. The delivered value for each status code is noted in parentheses.

- The post-hire message from HR sets the job opening status to 110 (Filled/Closed) if the available openings is zero.
- The Hold, Close, and Cancel actions on the Find Job Openings page update the job opening status to, respectively, 100 (Hold), 110 (Filled/Closed), and 120 (Canceled).

If any of these status codes do not exist, the corresponding action does not appear in the Select Action drop-down list box.

Setting Up Recruiting Statuses

To set up recruiting statuses, use the Status and Reasons (HRS_STS_DFN) and Status Area (HRS_STS_AREA) components.

This section discusses how to:

• Define statuses and reason codes.

- Set up rules for status areas.
- Define successors.
- Define the effects of status changes.

Important! The delivered system includes complete recruiting statuses definitions, including statuses, recruitment rules, successors, and status change effects. Oracle strongly recommends that you use the delivered statuses and status effects.

Pages Used to Set Up Recruiting Statuses

Page Name	Definition Name	Navigation	Usage
Statuses and Reasons	HRS_STS_DFN	Set Up HRMS, Product Related, Recruiting, Statuses and Reasons, Statuses and Reasons	For each of the six recruitment status areas, define status values and associated reasons.
Status Area	HRS_STS_AREA	Set Up HRMS, Product Related, Recruiting, Status Area, Status Area	Set up status change effects for each of the six status areas.
Status Successors	HRS_STS_SUCC_TBL	Click the Successors link on the Status Area page.	Define the progression from one status code to another.
Effects of Status Change	HRS_STS_EFF_TBL	Click the Effects of Status Change link on the Status Area page.	Define the effects of status changes.

Defining Statuses and Reasons Codes

Access the Statuses and Reasons page (Set Up HRMS, Product Related, Recruiting, Statuses and Reasons, Statuses and Reasons).

Statuses and Reasons				
Recruitment Ar	rea: 3-Recruitment Summary			
Status		Find View All First 🚺 6 of 23 🕨 Last		
*Status Cd:	030	+ -		
*Description:	030 Screen			
Short Descriptio	on: Screen			
Recruitment Pha	ase: 3-Screen 💌			
Status Attribute	es Approval Status Attributes			
🗆 Draft 🗹 Oj	Draft 🗹 Open 🛛 🗖 Approval Status 🗖 Approval Default 🗖 Approval Denied			
Only one ro	w for this applicant can have this status			
Associated Rea	asons			
*Reason Cd	scription	Short Description		
010 Pre	eliminary Screen	Prelim 🛨 🗖		
020 Fin	al Screen	Final 🛨 🖃		

Statuses and Reasons

Recruitment Area	Displays the recruitment area whose statuses you are defining.		
Status Cd (status code) and Description	Enter a unique identifier and a description for each status code.		
Recruitment Phase	When defining statuses for the Recruitment Summary area, select a value to identify the overall phase of the recruitment process to which the status (disposition) belongs. Select from these values: <i>1-Review,2-Applied,3-Screen4-Route5-Interview6-Offer,7-Hire</i> , or <i>8-Reject</i> .		
	Certain recruiting processes use this information to identify applicants who are at specific points in the recruiting process. For example, when you access the Prepare Job Offer page from the Recruiter Alert pagelet, the system displays a list of applicants whose dispositions are associated with the <i>Offer</i> phase.		
	The screening process also looks at the recruitment phase to determine which applicants to process. To prevent applicants in the later phases of the recruiting process from being screened, the system processes only applicants whose dispositions are associated with either the <i>1-Review</i> phase, the <i>2-Applied</i> phase, or no phase at all. (Additionally, the disposition must have the Open check box selected.)		

Status Attributes

Draft	Select to indicate that records with this status are considered work-in- progress and are not yet active or available for further processing until approved.			
	For the job opening status area, this setting controls which status is applied when a user clicks the Save as Draft button on a job opening that has not yet been submitted. Additionally, if job opening approvals are active, the designated draft status is used for new job openings that are created by cloning an existing job opening.			
	For the offer status area, this setting controls which status is applied when a user clicks the Save for Later button on a job offer that has not yet been submitted.			
	For the recruitment summary status area (dispositions), this setting controls which status is applied when an applicant is using Candidate Gateway to apply online and the applicant saves the in-progress application without submitting it.			
	Note. Although the system does not prevent you from choosing more than one draft status in a status area, status areas where there is system logic that automatically applies the draft status should have only a single status marked as the draft status.			
Open	Select to indicate that records with this status are active and available for further processing.			
Only one row for this applicant can have this status	Select this check box to identify a status that can be used for only one row of data for an applicant. For example, in the Recruitment Summary area, this check box is selected for the delivered <i>Hired</i> status. If an applicant who has already been hired for one job opening is subsequently hired for another job opening, the system display a warning to let the user know that the status should be used for only one record for the applicant. The user can still continue with the action if, for example, the applicant is being hired for multiple job openings or if the applicant was previously hired for a job and subsequently left the job.			
	This field is not visible for the Job Opening recruitment area.			

Chapter 4

Approval Status Attributes

There are two recruiting objects that you can configure to require approval: job openings and job offers. The fields in the Approval Status Attributes group box are therefore available only for the job opening and offer recruitment areas.

Approval StatusSelect if the status is used during approval processing. When this check
box is selected, the Approval Default and Approval Denied check boxes
become available for entry so that you can mark the status as the default
status when a job opening or offer is either submitted for approval or
denied.

Approval Default	Select this check box for the status that the system should apply when a record is submitted for approval.		
	This check box is available only if the Approval Status check box is selected.		
Approval Denied	Select this check box for the status that the system should apply when approval is denied.		
	This check box is available only if the Approval Status check box is selected.		

Note. Use the Successors page to indicate an overall default status that is used for approved records and, if approvals are not active, for new records.

Associated Reasons

Optionally create reasons that are associated with the status.

Reason Cd (reason code) and Description	Enter a unique identifier and a description for each reason.		
	In the job opening and job offer status areas, you can use reason code identifiers to enable the assignment of default reason codes as the job openings and job offers move through different statuses. In these areas, reason codes persist across status changes.		
	For example, suppose the Draft and Pending statuses in the job opening area both have a reason code 100. The descriptions might be different, but the code itself is the same for both. If a job opening in Draft status has reason code 100, then when it goes into Pending status, the system assigns the Pending reason code 100. If the Pending status doesn't have a reason code 100, then when the job opening goes into Pending status, the Reason Code field will display <i>Invalid Value</i> .		

Setting Up Rules for Status Areas

Access the Status Area page (Set Up HRMS, Product Related, Recruiting, Status Area, Status Area).

Status Area

Recruitment Area: 1-Job Opening						
Define Recruitment Area R	ules		Cust	omize Find 🗖	First 🗹 1-7 of 7 🖸 Last	
Description	Default	Complete	Notification			
005 Draft				Successors	Effects of Status Change	
006 Pending Approval				Successors	Effects of Status Change	
008 Denied				Successors	Effects of Status Change	
010 Open				Successors	Effects of Status Change	
100 Hold				Successors	Effects of Status Change	
110 Filled/Closed		•		Successors	Effects of Status Change	
120 Canceled				Successors	Effects of Status Change	

Status Area page

Default	Select this check box to indicate the status that the system should apply to new records and, in areas where approvals are active, to newly approved records.
	For example, when job opening approvals are not active, the default status for the job opening status area is applied when a user clicks the Save and Open button on a new job opening. Additionally, the default status is used for new job openings that are created by cloning an existing job opening.
	You can select one status only as the default.
Complete	Select this check box if the status indicates the successful completion of the recruitment process. <i>Successful</i> refers to the most desirable outcome of the process—one that results in a hired applicant. For example, in the Job Opening status area, both <i>Filled/Closed</i> and <i>Canceled</i> are possible final statuses, but only <i>Filled/Closed</i> represents the <i>successful</i> completion of the recruitment process.
	You can select one status only as the complete status.
	For the Job Opening, Applicant, and Recruitment Summary status areas, the system displays an error if a user attempts to change a status from the complete status. In the Route, Interview, and Offer status errors, the system displays a warning, but lets the user continue.

Notification	Select this check box if you want a notification sent to the recruiters and hiring managers for the job opening when the status is applied.					
	Notifications related to applicant status changes are sent to the recruiters and hiring managers of the applicant's job openings that are in open statues.					
	For Job Openings, the JobOpeningStseffct template is used.					
	For Applicants, the ApplicantStsEffct template is used.					
	For all other areas, the <i>OtherStsEffct</i> template is used.					
	Note. The system sends status change notifications to the email address that is associated with the user's user ID, not the email address that is associated with the user's personal data record.					
Successors	Click to display the Status Successors page.					
Effects of Status Change	Click to display the Effects of Status Change page.					

Defining Successors

Access the Status Successors page (click the Successors link on the Status Area page).

Status Successor	S			
Recruitment Area:	3-Summary			
Description:	020 Applied			
Status Successor Details		Customize Find View All	🛗 First 🖪 1-10 of 10	Last
*Status Successor			Default	
010 Review		•		+ -
030 Screen		•		+ -
050 Route		•		+ -
060 Interview		•		+ -
070 Offer		•		+ -
080 Ready to Hire		•		+ -
090 Hired		•		+ -
100 Hold		•		+ -
110 Reject		•		+ -
120 Withdrawn		•		+ -
OK Cancel				<u> </u>
Status Successors page				
Recruitment Area and Description	Identifies the	status whose successors you	are listing.	

Status Successor Details

Status Successor	Add the status codes that are valid successors to the current status.
	If a user manually updates the status to one that is not configured as a successor, the system displays a warning. The user can choose to ignore the warning and save the new status anyway.
Default	Select the check box next to the status that is the most likely successor.

Defining the Effects of Status Changes

Access the Effects of Status Change page (click the Effects of Status Change link on the Status Area page).

Effects of Status	Change			
Recruitment Area:	3-Summary	/		
Description:	090 Hired			
Status Changes			Find View All First	3 of 4 🕨 Last
*Recruitment Area:	Recruitmen	t Summary	•	+ -
Affected Applicant:	Current App	I / Other Job Reqs	•	
New Status:	110 Reject		•	
New Reason:	Selected for Other Position			
	Revert to	D Last Status / Reas		
Apply To		<u>Customiz</u>	re Find View All 🖉 🛗 First 🚺 1-5	of 9 🕨 Last
Status		All Reasons	Specific Reason	
010 Review	•			+ -
015 Linked				+ -
020 Applied				+ -
030 Screen				+ -
050 Route	•			+ -
OK Cancel				

Effects of Status Change page

Recruitment Area (top of
page) and DescriptionIdentifies the status that, when applied, will cause the status effect changes
that you configure on this page.

Status Changes

Recruitment Area (in the
Status Changes group box)Identify the recruitment area that is affected by the status that is shown at
the top of the page.If the status that appears at the top of the page is in the Recruitment
Summary area, you can select other recruitment areas that are affected by
the status change. Otherwise, the only status area that can be changed is
Recruitment Summary, and the field is read-only.

Affected Applicant	This field is visible only if the status area to be changed is <i>Recruitment Summary</i> .	
	Select <i>Current Appl / Current Req</i> (current applicant/current requisition) if the new code should be applied to the current applicant that is linked to the current job where the status change is being made.	
	Select <i>Current Appl / Other Job Reqs</i> (current applicant/other job requisitions) if the new status and reason should be applied to the other positions that the current applicant has been linked to.	
	Select <i>Other Appl / Current Job Req</i> (other applicants/current job requisition) if the new status and reason should be applied to other applicants that are linked to the same job and no more openings on the job are available.	
New Status and New Reason	Select the status and, optionally, the reason to apply to the affected records.	
Revert to Last Status/Reason	Select this check box if the status in the affected recruitment area reverts to the previous status and reason code. Leave the New Status and New Reasor fields blank if you select this check box.	
Apply To		
Status	Select the statuses that are affected by the status change. You can choose from the status values that are defined for the recruitment area that you selected in the Status Changes group box.	
	For example, if you are defining changes to be made the Recruitment Summary status area (perhaps because of a change to the status in the Interview status area), the drop-down list box includes all Recruitment Summary statuses.	
All Reasons and Specific Reason	If the status change should be applied to all reason codes that are associated with the status, select the All Reasons check box. Otherwise, select one reason code in Specific Reason.	
	If the rule applies to some, but not all, of the reasons for a status code, you must list the status code once for each applicable reason.	

Chapter 5

Setting Up Screening Processes

This chapter provides an overview of screening setup and discusses how to:

- Set up screening questions.
- Make content types available for screening
- Set up screening levels.
- (USF) Set up preference programs.

Understanding Screening Setup

Screening is the process used by recruiters to evaluate a list of potential candidates and narrow the list to a few qualified applicants that can be interviewed or hired. Prescreening is a special use of screening that can filter out applicants even before they submit an application.

In PeopleSoft Talent Acquisition Manager, a job opening can have multiple screening processes, or screening *levels*, and each screening level can evaluate different criteria and use different processing rules.

This overview discusses:

- Screening criteria.
- Processing rules.

Screening Criteria

Screening criteria refers to the specific attributes that are desirable in an applicant. During screening, the system compares applicant attributes to job opening attributes to determine how well applicants meet the job requirements. Recruiters establish a job opening's criteria from within the Job Opening component, on the Job Opening Screening Criteria page. This page presents a list of job attributes so that the recruiter can choose which ones to use.

There are four types of job opening attributes that can be used as screening criteria:

• General requirements.

General requirements from the Job Information section of the job opening page include regular/temporary, full-time/part-time, start date, standard hours, shift, travel percent, minimum and maximum age, sex, citizenship status, and recruiting location.

General requirements from the salary information section of the job opening page include minimum salary and minimum grade.

• Education and experience.

Education and experience requirements indicate the number of years of experience required for applicants with various levels of education. To meet education and experience screening criteria, the applicant must have *both* the education level and the minimum amount of experience required for that level.

• Screening questions.

Screening questions enable you to ask multiple-choice or open-ended questions to applicants who apply online. If a job opening includes screening questions, the system makes all of the questions available for use during screening.

Note. Unlike the other types of screening criteria, screening questions are useful only if applicants can submit applications online. Answers to screening questions cannot be entered in the Application Details page.

• Profile content types.

The Manage Profiles module in PeopleSoft Human Resources provides a flexible architecture for describing the attributes of jobs and individuals. *Content type* is a generic term for an attribute that can be part of a profile. In the context of the recruiting process, content types are attributes that are used to describe job qualifications and the corresponding applicant attributes.

Oracle delivers several content types that are already configured for the recruiting system; you can use Manage Profiles to create more.

All types of screening criteria are available only if the job opening template and resume template include the corresponding sections. For example, to screen applicants based on education and experience, the job opening template must include the *Education and Experience* section and the resume template must contain both the *Education History* and *Work History* sections.

See Chapter 9, "Setting Up Recruiting Templates," page 131.

The following table summarizes the setup tasks for each type of screening criteria:

Criteria Type	Setup Requirements
General Requirements	• Include the <i>Job Information</i> section and, optionally, the <i>Salary Information</i> section in the job opening template.
	The Job Information section is a mandatory part of every job opening template.
	• Include the <i>Preferences</i> section in the resume template.
	This configures the online application pages so that applicants can enter general preferences such as location, work days, regular/temporary, and so forth.

Criteria Type	Setup Requirements			
Education and Experience	 Include the <i>Education and Experience</i> section in the job opening template. This configures the Job Opening page to includes a grid where recruiters can enter education and experience requirements. Include the <i>Education History</i> and <i>Work History</i> sections in the resume template. This configures the online application pages so that applicants can enter their highest education level and can provide work history details, including start and encodates for each period of employment. 			
Screening Questions	 Include the <i>Screening Questions</i> section in the job opening template. This configures the Job Opening page to includes a grid where recruiters can add questions to the job opening. Include the <i>Online Questionnaire</i> section in the resume template. This configures the online application pages so that applicants can see and answer the questions while completing a job application. Define reusable question definitions that recruiters can associate with job openings. See <u>Chapter 5</u>, "Setting Up Screening Processes," Setting Up Screening Questions, page 63. 			
Profile content types	 Include the corresponding section in the job opening template. This configures the Job Opening page to includes a grid where recruiters can add content items to the job opening. Include the corresponding section in the resume template. This configures the online application pages so that applicants can add content items to their applications. Use the Content Section Configuration page to mark the content type for use in screening, and to choose which of its attributes are used to evaluate the applicant. See Chapter 5, "Setting Up Screening Processes," Making Content Types Available for Screening, page 72. Note. If you use content types other than those that Oracle delivers, you must first set up those content types and, to make them available to the recruiting system, you must add them to the primary person profile that you identified on the Assign Profile Type Defaults page. See Chapter 3, "Setting Up Profile Integration," Choosing the Primary Person Profile Type for Recruiting, page 26. 			

Processing Rules

This section discusses the different types of screening processing rules and explains where the rules are configured.

Rules That Apply to a Single Screening Level

To set up screening, you must set up reusable screening level definitions. These include default processing rules that apply to the screening level. When the screening level is used for a specific job opening, recruiters can override most (though not all) of the default settings.

See Chapter 5, "Setting Up Screening Processes," Setting Up Screening Level Definitions, page 74.

Examples of screening level processing rules include:

• Whether the screening level runs automatically during the online application process, and what messages are used to give applicants instructions or results during such screening.

See <u>Chapter 5</u>, "Setting Up Screening Processes," Understanding Prescreening and Online Screening, page 77.

- What percentage of the total possible points the applicant must earn in order to pass the screening level.
- How to determine an applicant's overall score for the screening level, and whether to allow manual determination of pass/fail status in a screening level.

Manual determination of pass/fail status is not applicable to screening levels that run during the online application process (prescreening and online screening).

• What disposition to assign to applicants depending on whether they pass or fail the screening level.

Rules That Reach Across Multiple Screening Levels

Certain processing rules reach across multiple screening levels.

Screening templates enable you to set up default settings for some such rules; recruiters can override the default settings within individual job openings.

Cross-level settings that you configure in a screening template include:

- Whether applicants must pass the previous level to be included in the subsequent screening level.
- (USF) Various settings that control the classification and ranking of U.S. federal applicants after all screening levels have been processed.

Note. You cannot use screening templates to set up default settings for *transmutation*, a process used during U.S. federal screening to give candidates an overall score out of 100 based on the results of two separate screening levels. Transmutation settings rules are configured within each job opening.

See <u>Chapter 9</u>, "Setting Up Recruiting Templates," Setting Up Screening Templates, page 161 and <u>Chapter 13</u>, "Creating Job Openings," (USF) Understanding U.S. Federal Screening Setup, page 289.

(USF) Federal Preference Items

In the U.S. federal screening process, these preference items entitle applicants to specific advantages during screening:

- Priority placement status.
- Veterans preference.

The system provides setup pages where you define the codes for each of these preference items.

See Chapter 5, "Setting Up Screening Processes," (USF) Setting Up Preference Programs, page 83.

Setting Up Screening Questions

To set up screening questions, use the Answer Definition (HRS_ANSWER_DEF), Question Definition (HRS_QSTN_DEF), and Question Set Definition (HRS_QSTN_SET_DEF) components.

This section provides an overview of questionnaire setup and discusses how to:

- Set up answer definitions.
- Set up question definitions and default answer scores.
- Set up question set definitions.
- Review answers to questions in a question set.

Understanding Screening Question Setup

Many organizations include screening questions in their screening process. Talent Acquisition Manager enables you to create questionnaires that are presented to applicants when they use PeopleSoft Candidate Gateway to apply for a job opening. Questions can be general in nature or tailored to a specific job opening.

Screening Question Architecture

To set up screening questions, you create reusable question definitions containing the text of the question. Question definitions can be multiple choice or open-ended. Multiple-choice questions reference one or more separately-defined answers. Open-ended questions are not associated with answer definitions; applicants enter freeform text answers.

Question sets are groups of questions that can be added to a resume template or job opening all at once. Questions sets exist only to simplify the process of adding the questions; the question set itself does not exist within the template or job opening.

To set up screening questions:

1. Create an answer definition for each answer.

2. Create a question definition for each question and, if the question is not open-ended, link answers to the question.

During this step, you also assign default points for each of the possible answers to the question.

3. (Optional) Create question set definitions and link questions to the question set.

Adding Question Sections to Templates

To configure the system to support screening questions, your resume templates and job opening templates must include sections for questions. To create a place for questions in the overall format of the online resume and the job opening:

1. Add the Online Questionnaire section to resume templates.

See Chapter 9, "Setting Up Recruiting Templates," Setting Up Resume Templates, page 133.

2. Add the Screening Question section to job opening templates.

See Chapter 9, "Setting Up Recruiting Templates," Setting Up Job Opening Templates, page 150.

These steps provide the structure for associating questions with applications and with job openings. There are also two ways to associate specific questions directly with template:

• You can add specific questions to a resume template; these are used for prescreening when an applicant applies online without selecting a job opening.

When a job opening's recruitment template is associated with a resume template that has prescreening questions, the questions are added to the job opening by default.

See <u>Chapter 5, "Setting Up Screening Processes," Understanding Prescreening and Online Screening, page 77.</u>

• You can add a question set to a job opening template; the questions in the set are added to new job openings by default.

Adding Questions to Job Openings

If the job opening template includes the *Screening Question* section, then you can add questions to the job opening. You can add questions individually, or you can load questions from a question set. When you load questions from a question set, you choose which of the questions in the set to add to the job opening; it is not necessary to add the full set.

To expedite data entry, you can associate a default question set with a job opening template. If you do this, the questions in the default question set are automatically brought into any newly created job openings that are based on the template.

When you add questions to a job opening, you indicate the order in which questions appear to applicants. Regardless of the order you specify, open-ended questions always appear after all multiple-choice questions.

If the Randomize Screening Questions field on the Recruiting Installation - Jobs page has a *Yes* value, then the system disregards the question order and presents questions to applicants in random order, although openended questions still appear last. The Recruiting Installation - Jobs page also has a setting that you can use to randomize answer order for multiple-choice questions.

Using Questions for Screening

When you use questions as screening criteria, you assign points to the questions.

For multiple-choice questions, the question definitions include default point values for each answer. Recruiters can override these default point values when they configure screening for a specific job opening.

For open-ended questions, the question definitions include the maximum point value. When you add an openended question to a job opening, you assign evaluators who score the applicants' answers and award points accordingly. During screening, the system averages the points awarded by all evaluators (ignoring any who haven't submitted their evaluations) to calculate a single point value for an applicant's answer.

During screening, the system does not award any points for unanswered questions or for open-ended questions that have been answered but not yet evaluated. When reviewing screening results, you can review an applicant's questionnaire to ascertain whether either of these conditions affected the outcome of the screening process.

If you use questions for screening, remember that the only way for applicants to provide answers to screening questions is through Candidate Gateway. Applicants who send their resumes through a job board or email address, or whose applications are entered by a recruiter or administrator using the Add New Applicant component, do not see the questionnaire at the time they apply. However, if you use the *Link Applicant to Job* action to associate an applicant to a job opening that includes questions, the system sends the applicant an email asking that the applicant go to Candidate Gateway and answer the question. Applicants who have not previously registered for Candidate Gateway can use a special link in the email to access Candidate Gateway and register; using the link ensures that the system recognizes the newly registered applicant and associates the registration with the existing applicant record. When the applicant signs in to Candidate Gateway, the Careers Home page displays a notification inviting the applicant to complete the questionnaire.

See Chapter 22, "Managing Applicants," Linking Applicants to Job Openings, page 629.

Changes to Questions

In a question definition, changes that you make to the question text or answer text flow through to job openings that are linked to the question or answer.

However, any answers that you add to a question or remove from a question do not appear in job openings to which the question is already linked. To update the answer list for a question in a job opening, you need to remove the question from the job opening and then add it back.

Changes that you make to the default points for an answer flow through to questions that have not yet been marked for use during screening. However, once a question is marked for use during screening, the point values for that particular screening process do not change when the default point values change.

See Also

Chapter 9, "Setting Up Recruiting Templates," Setting Up Job Opening Templates, page 150

Chapter 13, "Creating Job Openings," Entering Primary Job Opening Information, page 242

Pages	Used to	Set Up	Questionnaires
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Page Name	Definition Name	Navigation	Usage
Answer Definition	HRS_ANSWER_DEF	Set Up HRMS, Product Related, Recruiting, Screening, Answer Definition, Answer Definition	Set up answer definitions.
Question Definition	HRS_QSTN_DEF	Set Up HRMS, Product Related, Recruiting, Screening, Question Definition, Question Definition	Set up question definitions.
Question Set Definition	HRS_QSTN_SET_DEF	Set Up HRMS, Product Related, Recruiting, Screening, Question Set Definition, Question Set Definition	Set up question set definitions.
Question Answers	HRS_QSTN_SET_ANS	Click the link in the Action column of the Questions grid on the Question Set Definition page.	View answers to questions.

Setting Up Answer Definitions

Access the Answer Definition page (Set Up HRMS, Product Related, Recruiting, Screening, Answer Definition).

Answer Def	inition
Answer ID:	1012
*Answer Code:	NFLSTN2BTH
*Description:	Listen to Both Sides
Short Description:	LISTEN2BTH
*Long Description:	Listen to both employees' version of the incident, and make a decision about what to do based on each person's version of this situation. The reputation of the individuals should not be a factor.

Answer Definition page

Answer Code	Enter a code that identifies this answer. This code appears only on search pages and lookup dialog boxes. The system does not require this to be a unique code.
Description	Enter an identifying name for this answer. A descriptive name helps you when you reference the answer definition from within a question definition. Other pages that display answers, however, use the full text of the answer rather than these shorter identifiers.
Long Description	Enter the complete text of this answer.

Setting Up Question Definitions and Default Answer Scores

Access the Question Definition page (Set Up HRMS, Product Related, Recruiting, Screening, Question Definition, Question Definition).

Question Definition					
Question ID:	1004				
*Question Code:	KOVERTIME	🗖 Open En	nded Question		
*Status:	Active	Status Date	: 08/09/20	001	
*Description:	Overtime				
Short Desc:	Overtime				
Long Description:	Are you willing to work	overtime periodica	ally ?		24
Answers		<u>Customi</u>	ze Find 🗖 🕌	First 🚺 1-2 of 2	2 🗈 Last
*Answer ID	Long Description		Correct Answer	Default Points	
1027 🔍	No				+ -
1037 🔍	Yes				+ -

Question Definition page

Question Code

Enter a code that identifies the question. This code appears only on search pages and lookup dialog boxes. The system does not require this to be a unique code.

Open Ended Question	Select this check box to identify an open-ended question. Because open- ended questions do not have predefined answer sets, selecting this check box removes the Answers grid from the page and replaces it with the Maximum Points field.
	When this check box is not selected, the question must have at least two possible answers.
Status and Status Date	Indicate whether the definition is <i>Active</i> or <i>Inactive</i> . Whenever you change the status, the system changes the status date to the current date.
Description and Short Description	Enter an identifying name for this question. A descriptive name helps recruiters identify the question when they manage the list of questions in a job opening or question set.
Long Description	Enter the complete text of this question.
Maximum Points	If this is an open-ended question, enter the maximum number of points (up to 100) that an applicant can receive for answering this question. The actual number of points that the applicant receives is determined by averaging scores that evaluators manually assign. Evaluators who have not yet evaluated the answer are not included in the calculation.

Answers

This grid does not appear for open-ended questions. Multiple-choice questions must include at least two answers. The answers appear as check boxes in the online questionnaire.

Answer ID	Select an answer to link to the question.
Long Description	After you enter an answer ID, the text of the answer (the long description on the Answer Definition page) appears in this column.
Correct Answer	Select the check box next to any answer that is correct answer for the question. There can be more than one correct answer. The number of correct answers determines the number of check boxes that an applicant can select in the online questionnaire. For example, if a question has five answers, and two are marked as correct, then the applicant will be able to select a maximum of two answers at runtime.
	There must be at least one correct answer.

Default Points	Enter the default number of points that an applicant who selects this answer receives during screening. You can assign points to both correct and incorrect answers, depending on your business processes. When applicants can choose more than one answer, the screening process adds the points for all chosen answers to calculate the total points that the applicant is awarded for the question.		
	It is possible to assign negative points to an answer to punish incorrect answers.		
	Recruiters can override the default point value of an answer when configuring criteria for a specific screening level in a specific job opening.		

Setting Up Question Set Definitions

Access the Question Set Definition page (Set Up HRMS, Product Related, Recruiting, Screening, Question Set Definition, Question Set Definition).

Question \$	Set Definition					
Question Set						
Question Set ID: *Question Set Co *Status: *Description: Short Descriptio Explanation:	Active Customer Focus		us Date: petency:	07/31/2001 0207		
Questions	<u>Cu</u>	stomize	<u>Find</u> 🛃	First 🚺 1-2 of	2 🕨	_ast
*Question ID	Long Description		Order Number	Action		
1006	An Angry and argumentative customer calls with question on how to implement software they ha purchased from your company, you normally do handle this type of call nor do you know the ans What do you do?	d n't	5	<u>View Answers</u>	+	-
1003 🔍	How do you deal with an irate customer on the telephone		10	Open Ended	+	-

Question Set Definition page

Question Set Code	Enter a code that identifies this question set. This code appears only on search pages and lookup dialog boxes. The system does not require this to be a unique code.
Status and Status Date	Indicate whether the definition is <i>Active</i> or <i>Inactive</i> . Whenever you change the status, the system changes the status date to the current date.
Description	Enter an identifying name for this question set. A descriptive name helps recruiters identify the question set when prompting for a question set to add to a job opening.
Competency	Optionally identify the competency that is assessed through the applicant's answers to the questions in the question set. This is informational only; the competency does not affect the job opening, nor is it added to the job opening when you load the question set.
Explanation	Enter details about the purpose or contents of the question set. This is helpful to anyone who needs to update the question set. It is not visible to users who add the question set to a job opening.
Questions	
Question ID	Enter the ID of each question that you want to add to the question set.
Long Description	After you enter a question ID, the text of the question (the long description on the Question Definition page) appears in this column.
Order Number	Enter numbers to control the default order of for the questions in the set. When you load the question set into a job opening, these become the default order numbers in the Screening Questions grid. Users can then modify the order numbers for the individual job opening.
	The system does not prevent you from assigning the same order number to multiple questions. When you load question set definitions into a job opening, review the default order numbers and update them as necessary to create an unambiguous question order.
	Because this field accepts only integers, consider using non-consecutive numbers to make it easier to insert additional questions between existing questions.
	Regardless of the order numbers you assign, open-ended questions always appear at the end of the questionnaire, after all multiple-choice questions.
	Note. If the Randomize Screening Questions field on the Recruiting Installation - Jobs page has a <i>Yes</i> value, then the system disregards the question order and presents questions to applicants in random order, although open-ended questions still appear after all multiple-choice questions.

ActionDisplays a link to the Question Answers page.For open-ended questions, the link text is Open Ended. When you click this
link, the Question Answers page displays the text and the maximum point
value of the open-ended question.For other questions, the link text is View Answers. When you click this link,
the Question Answers page displays the question, its correct and incorrect
answers, and the default point value of each answer.

Reviewing Answers to Questions in a Question Set

Access the Question Answers page (click the link in the Action column of the Questions grid on the Question Set Definition page).

Question \$	Question Set Definition			
Questio	Question Answers			
Question ID:		1038		
Description:		Driver's license?		
Long Descrip	tion:	Do you possess a valid Driver's license?		
Answers		<u>Customize F</u>	ind 🗖 🛗 First	1-2 of 2 Last
Answer ID	Descript	ion	Correct Answer	Default Points
1009	Yes			10
1025	No			0
ОК	Cancel			

Questions Answers page: multiple-choice question

Question Set Definition		
Question Ans	swers	
Question ID:	1066	
Description:	disclose pre-background check	
Long Description:	GBIBU makes use of a background check in respect of all applicants who are selected for interview. Is there any information you would wish to disclose to GBIBU at this stage bearing in mind that non-	
Maximum Points:	10	

Question Answers page: open-ended question

For multiple-choice questions, this page displays the answer choices and their default point values.

For open-ended questions, this page displays the question and its maximum point value.

Making Content Types Available for Screening

This section discusses how to configure content types for screening.

See Also

Chapter 3, "Setting Up Profile Integration," Configuring Profiles for Recruiting, page 28

Page Used to Configure Content Types for Screening

Page Name	Definition Name	Navigation	Usage
Content Section Configuration	HRS_JPM_SECT_CFG	Set Up HRMS, Product Related, Recruiting, Templates, Content Section Configuration, <content Type></content 	Make content types available for use during screening, and select specific properties for the screening process to evaluate.

Configuring Content Types for Screening

Access the Content Section Configuration page (Set Up HRMS, Product Related, Recruiting, Templates, Content Section Configuration).

Note. The page name varies according to which content type you are configuring.

Competencies					
Status Date: 01/01/1900 D Applicant may add items					
Properties		<u>Customi</u> :	ze Find 💷	First 🚺 1	I-21 of 21 D La
Field Name	Label Text	Required	Summary	Use in Screening	Default
EVALUATION_ID					
JPM_CAT_ITEM_ID	Competency	\checkmark	V		
JPM_PERSON_ID_1	EmplID				
JPM_CAT_TYPE	Content Type	\checkmark	V		
EP_APPRAISAL_ID	Appraisal ID				
RATING_MODEL	Rating Model	\checkmark			PSCM
JPM_RATING1	Proficiency	V	V	~	
JPM_INTEREST_LEVEL	Interest Level				
JPM_VERIFY_METHOD	Verified By				
JPM_CAT_ITEM_QUAL	Evaluation Type	\checkmark	V		
JPM_CAT_ITEM_QUAL2	Reviewer ID				
JPM_INTEGER_1	Year Last Used	Γ			
JPM_INTEGER_2	Year Acquired				
JPM_DECIMAL_2	Years Of Experience	Γ			
JPM_YN_1	Reviewer Is Approved				

Content Section Configuration page

You can access this page only for content types that belong to the primary person profile that you specify on the Assign Profile Type Defaults page. These are the content types that are available to the recruiting system.

See <u>Chapter 3, "Setting Up Profile Integration," Choosing the Primary Person Profile Type for Recruiting, page 26.</u>

Properties

This grid lists all properties of the selected content type.

Field Name and Label Text These fields identify a specific field that is part of the content type definition. For example, the content type *Competencies*, which you use for applicant competency ratings, includes fields such as Rating Model and Proficiency. Use in Screening Select this check box to make the field available for screening. Fields where this check box is selected are included in the criteria list on the Job Opening Screening Criteria page, where you choose which of the available criteria to use in a specific screening level. For example, the delivered configuration for the Competencies content type has only one field that is available for screening: the Proficiency field. When you add a competency to a job opening, you will enter data such as the competency name, rating type, and the rating. But when you configure the screening criteria for the job opening, the rating is the only competencyrelated information that is listed in the grid where you select screening criteria. (Because the rating is associated with a particular competency and rating model, the screening process automatically looks for the rating for that particular competency). If you were to change the configuration for competencies so that the competency name was the only field used in screening, then the screening process would simply check that the applicant's application lists the competency, regardless of the applicant's rating. Note. If the JPM_CAT_ITEM_ID attribute is selected and one or more additional fields are also selected, then only additional fields are used for screening. For example, when configuring competencies, if you select both the JPM_CAT_ITEM_ID (Competency) field and the JPM_RATING1 (Proficiency) field, only the Proficiency field is available for screening.

Note. The other elements on this page are not used to set up screening process.

Setting Up Screening Level Definitions

To set up screening levels, use the Screening Levels (HRS_SCREEN_TBL) component.

This section provides an overview of screening levels and an overview of prescreening and online screening. This chapter then discusses how to set up screening level definitions.

Understanding Screening Levels

Screening levels enable you to evaluate applicants multiple times, applying different screening criteria or different processing rules during each successive round of screening.

Screening Level Usage

A job opening can include multiple screening levels, each with its own set of screening criteria and its own processing rules. Within a job opening, screening levels are assigned an order so that recruiters can process each level in its logical sequence.

For example, you might use a preliminary screening level to select candidates who meet basic employment eligibility requirements, then a final screening level to assess the applicant's job qualifications.

Using multiple screening levels is a useful strategy for filtering out unqualified applicants before rating the remaining applicants (for example, entering competency ratings).

Screening Level Setup

There are two aspects of setting up screening levels for a job:

• When you implement the recruiting system, you create reusable screening level definitions and add them to templates so that they are automatically added to newly created job openings.

These screening level definitions include general processing rules; they do not list the actual qualifications to be assessed.

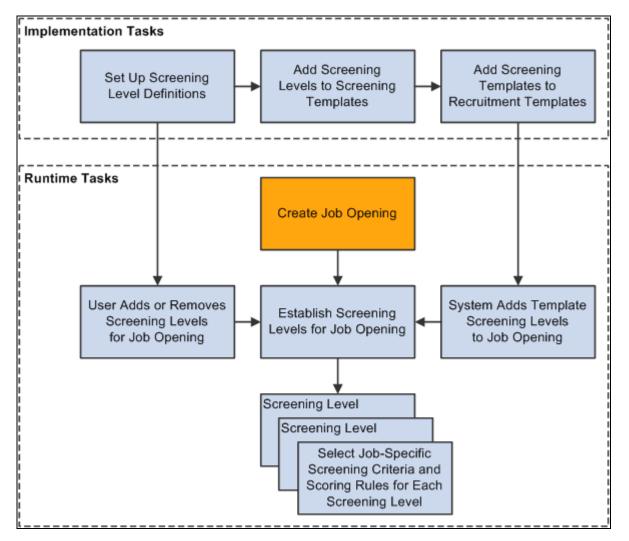
You add one or more screening level definitions to a screening template, and you add one screening template to a recruitment template. Because every job opening is associated with a recruitment template, creating a job opening causes the system to add the appropriate screening levels to the job opening.

See Chapter 9, "Setting Up Recruiting Templates," Understanding Recruiting Templates, page 131.

• When you are running the recruiting system, users set up screening for specific job openings by establishing the actual screening criteria for each screening level in the job opening.

Users can also add or remove screening levels for the job opening if the default set of screening levels is not satisfactory.

The following diagram illustrates the steps to be taken during system implementation, when you set up screening levels and add them to templates, and the steps to be taken at runtime, when users establish screening levels for a particular job opening and define the job-specific screening criteria.



Set up screening levels during implementation; define screening criteria for individual jobs at runtime.

Process Settings

The screening level definition includes default values for these process settings:

• The threshold for passing the screening level.

When users define the job-specific criteria for a screening level, they establish point values for each item that is evaluated. When the screening process runs, it determines how many of the total available points each applicant has earned. Applicants pass or fail the screening level depending on whether they earn enough points to meet the passing percentage in the screening level definition.

See Chapter 13, "Creating Job Openings," Defining Screening Level Rules and Criteria, page 298.

• Dispositions to assign to applicants when applying screening results.

Dispositions are statuses in the Recruitment Summary status area, which tracks the applicant's overall status with regards to a particular job opening. When you apply screening results, you assign dispositions based on whether the applicant passed or failed the screening level. Typically, you use the *Screen* disposition for applicants who pass and the *Reject* disposition for applicants who fail.

• Rules for assigning applicants an overall score for the screening level.

There are two options for setting the overall score:

• Award *raw points*, the total number of points that the applicant earned by meeting specific screening criteria.

This option enables you to see exactly how well each applicant met the screening criteria.

• Award specific numbers of points for passing and for failing.

For example, during U.S. federal screening for salaried positions, applicants who pass the first screening level all receive 70 points, while applicants who fail that level receive 0 points.

The screening level definition includes additional settings that you use to configure prescreening and online screening.

See <u>Chapter 5, "Setting Up Screening Processes," Understanding Prescreening and Online Screening, page</u> <u>77.</u>

(USF) U.S. Federal Screening Setup

The U.S. federal screening process requires very specific processing rules. You set up some of these rules in the job opening rather than in the screening level definition. Certain scoring rules, however, can be defined in screening level templates so that the settings will correctly default into the job opening.

See Chapter 13, "Creating Job Openings," (USF) Understanding U.S. Federal Screening Setup, page 289.

Delivered Screening Levels

Oracle delivers the following screening level definitions:

- Basic Screening, which is designed for commercial users.
- Basic Eligibility, which is designed for federal users.
- Minimum Qualifications, which is designed for U.S. federal users.
- Quality Ranking, which is designed for U.S. federal users.

Understanding Prescreening and Online Screening

If applicants use PeopleSoft Candidate Gateway to apply online, you can configure the system to evaluate the applicants during the application process. To do this, you create screening levels for *prescreening* or *online screening*.

Prescreening

Prescreening occurs before the applicant reaches the point of entering application data. Typically, you use prescreening to ensure that applicants meet basic requirements such as being able to legally to work in your country.

If prescreening is active, then as soon as the applicant attempts to apply (with or without a job opening), the system presents one or more multiple-choice questions. These appear after the applicant completes the resume portion of the online application process. The applicant must answer the questions before continuing.

When the applicant submits the answers to the questions, the system evaluates the answers immediately. The system then presents the applicant with a message that depends on whether the applicants passed prescreening. Applicants who pass are permitted to continue with the job application. Applicants who fail are informed that they do not meet your qualifications and that they may not continue with the application.

Regardless of whether the applicant passes prescreening, the system creates an applicant record. The system assigns the applicant the disposition that you indicate in the screening level definition. Oracle delivers a *Failed Prescreening* disposition to use for applicants who fail prescreening.

To implement prescreening for specific job openings, you create a prescreening screening level and add it to a job opening's list of screening levels.

An applicant who passes prescreening for a job opening and then applies again for the same job opening must still complete the prescreening step when reapplying.

If an applicant applies for more than one job at once, the system merges the prescreening questions from all selected job openings.

You can also define prescreening in your resume template. This serves two purposes:

• The questions that you include in the resume template are automatically added to new job openings that use that template.

You still need to indicate whether the questions should actually be used in any of the job opening's screening levels.

• If an applicant applies without selecting a job opening, the system invokes the prescreening definition from the default resume template for the site

In the Resume Template component, you do not reference a separately-defined screening level. Instead, you use the Pre Screening page, which includes all relevant screening level fields along with a list of prescreening questions.

See Chapter 9, "Setting Up Recruiting Templates," Setting Up Resume Templates, page 133.

A screening level for prescreening has the following characteristics:

• It is always the first screening level in any screening template or job opening where it is included.

The system always inserts the screening level in this position, and you cannot change the order.

- The definition must include messages text IDs for the pass and fail messages that Candidate Gateway presents to the applicant.
- Multiple-choice questions (including yes/no questions) are the only allowable screening criteria; openended questions are not permitted.
- A job opening can include only one prescreening level.

The job opening can have both a prescreening level and an online screening level, but only one of each.

Online Screening

Online screening occurs after an applicant submits an application for a job opening; it is not applicable to applicants who apply without selecting a job.

When the applicant submits the application, the system immediately processes the screening level and optionally presents the applicant with a message related to the results of the online screening process. For example, an applicant who passes the screening level might see a message indicating that the application has been accepted, while an applicant who fails the screening level might see a message indicating that the application has been rejected because the applicant does not have the necessary job qualifications.

Regardless of whether the applicant passes the online screening level, the system creates an applicant record and links it to the job opening that the applicant applied for. The system assigns the applicant the disposition that you indicate in the screening level definition. Oracle delivers a *Reject Online Screening* disposition to use for applicants who fail prescreening

A screening level for online screening has the following characteristics:

• In the screening level sequence for a screening level or job opening, online screening always comes before all other screening levels except the prescreening level (if any).

The system always inserts the screening level in this position, and you cannot change the order.

- The definition can include optional messages text IDs for pass and fail messages for Candidate Gateway to present to the applicant.
- Multiple-choice questions (including yes/no questions) are the only allowable questions; open-ended questions are not permitted.
- Other than open-ended questions, online screening criteria can include all of the same types of criteria as standard screening levels.
- A job opening can include only one online screening level.

Note. Although it is possible for a job opening to have screening levels for both prescreening and online screening, be aware that this configuration could be confusing to applicants who see two questionnaires and two screening results messages during the process of applying. A more user-friendly configuration is to avoid prescreening if you use online screening. To do this, consolidate prescreening and online screening questions into the online screening level.

Page Used to Set Up Screening Level Definitions

Page Name	Definition Name	Navigation	Usage
Screening Definition	HRS_SCREEN_TBL	Set Up HRMS, Product Related, Recruiting, Screening, Screening Levels, Screening Definition	Set up screening definitions.

Setting Up Screening Level Definitions

Access the Screening Definition page (Set Up HRMS, Product Related, Recruiting, Screening, Screening Levels, Screening Definition).

Screening Definition	
Screening Level Description	
Screening ID:	1002
*Status:	Active
*Description:	Minimum Qualifications
Short Description:	Min Quals
Letter:	
Pre Screening	Online Screening
Status Definition	
Pass Status:	Screen 🔽
Pass Reason:	
Pass Message Text ID:	
Fail Status:	Reject 💌
Fail Reason:	
Fail Message Text ID:	
Scoring Definition	
Assign Points	
Percent Needed to Pass:	100 Use Raw Points
Maximum Points to Assign:	
Points Assigned for Pass:	
Points Assigned for Fail:	
Manually Assign Status	

Screening Definition page

Screening Level Description

Enter basic information about the screening level.

Status Select whether this screening level is *Active* or *Inactive*.

Description	The system uses the full description (rather than the short description) to identify the screening level on the various recruiting pages that includes references to screening levels.
Letter	Select the default letter to send to applicants who fail this screening level. The letter is added to the queue for the Generate Recruitment Letter (HRSLETTER) process after screening results are applied.
	The drop-down list box includes all of the letters in the HRS_APP_LET report definition, which includes letters for various purposes. Take care to select the appropriate letter. The sample rejection letter that Oracle delivers is HRS_APP_LETTER_IR.
	Note. Prescreening and online screening levels do not use this setting.
	See Chapter 22, "Managing Applicants," Generating Batch Recruitment Letters, page 647.
	Users can override this default selection when they configure job-specific criteria for the screening level in the Job Opening Screening Criteria page.
Pre Screening and Online Screening	Select one of these check boxes to mark this as a screening level for either prescreening screening or as online screening. You cannot select both check boxes.
	Leave both check boxes deselected if you are defining a standard screening level.
	See <u>Chapter 5, "Setting Up Screening Processes," Understanding</u> <u>Prescreening and Online Screening, page 77.</u>

Status Definition

Your choices in these fields provide default values for the equivalent fields on the Job Opening Screening Criteria page (the page where recruiters configure the screening level for a specific job opening). Recruiters can override the default statuses, but not the associated messages.

See Chapter 13, "Creating Job Openings," Defining Screening Level Rules and Criteria, page 298.

Pass Status and Pass Reason	Select the default disposition (and, optionally, an associated reason) for the system to assign applicants who pass this screening level. Typically, you assign the <i>Screen</i> disposition for standard screening levels and the <i>Applied</i> disposition for online screening and prescreening levels.
Fail Status and Fail Reason	Select the default disposition (and, optionally, an associated reason) for the system to assign applicants who fail this screening level. Typically, you assign the <i>Reject</i> disposition for standard screening levels and the <i>Failed Prescreening</i> disposition for prescreening levels.

Pass Message Text ID and Fail Message Text ID	If either the Pre Screening or Online Screening check box is selected, select the IDs for the messages that Candidate Gateway presents to applicants who pass and who fail this screening level. If neither check box is selected, leave these fields blank.	
	Note. Messages are mandatory for prescreening and optional for online screening. Standard screening levels do not use these settings.	

Scoring Definition

Your choices in these fields automatically populate the equivalent fields on the Job Opening Screening Criteria page. Recruiters can override the default values.

Percent Needed to Pass	Enter the minimum percentage amount of the total possible points for all screening criteria that an applicant must have to pass the screening level. Note. Unless all questions have the same point value, this percentage is <i>not</i> necessarily the same as the percentage of questions that the applicant must answer correctly.		
	For U.S. federal salaried screening, the first screening level typically requires applicants to achieve 100% to pass.		
	For U.S. federal hourly screening, the first screening level typically requires applicants to achieve 50% to pass.		
	For both types of U.S. federal screening, you can typically leave these fields blank for the second screening level, which typically uses transmutation to calculate a score.		
Use Raw Points	Select this check box if you want applicant's scores for the screening level to be the total points that the applicant earned by meeting individual screening criteria for this screening level.		
	If you select this check box, do not enter values in the Points Assigned for Pass and Points Assigned for Fail fields.		
Maximum Points to Assign	If you select the Use Raw Points check box, use this field to optionally enter a maximum number of points to assign, regardless of the applicant's raw points.		
Points Assigned for Pass and Points Assigned for Fail	Enter scores to assign to all applicants who pass or fail this screening level. Do not enter a value if you are using raw points as the applicant's score.		
	To assign zero points when an applicant fails the screening level, enter 0 rather than leaving the field blank.		

Manually Assign Status Select this check box to allow recruiters to manually set an applicant's the pass/fail status for a screening level. Recruiters can set this status with or without running the screening process, which will still calculate the applicant's score and set an initial pass/fail status if it runs.

When this check box is selected, the rest of the scoring-related page elements become read-only.

(USF) Setting Up Preference Programs

To set up U.S. federal preference programs, use the Veterans Preference (HRS_G_VET_PRF_TBL) and Priority Placement (HRS_G_PR_PL_TBL) components.

This section provides overviews of veteran's preference codes and priority placement processing and discusses how to:

- Set up veterans preference codes.
- Set up priority placement codes.

Important! Oracle provides options that you can use to achieve compliance, but you are responsible for configuring the system to comply with applicable regulations.

Understanding Priority Placement Processing

Some applicants are entitled to automatic consideration for job openings that meet certain criteria, even if the applicant hasn't specifically applied for the job opening.

Priority placement processing is governed by the internal policies of and the regulations issued by the U.S. Office of Personnel Management (OPM).

Priority Placement Processing

Priority placement codes are linked to both applicants and job openings. The configuration for a priority placement code indicates what type of priority processing an applicant with the code receives with regards to job openings that have the same priority placement code, job level, and salary grade.

For each code, there can be different types of priority processing depending on the job opening's type: internal, merit promotion, or open requisition. (The Recruitment Type field on the Job Opening page contains this designation.)

The types of priority processing options are:

- Must Select
- Must Consider
- None

At the beginning of the applicant screening process, you run the RS - Priority Placement (HRS_PRI_PLCM) Application Engine process to assess applicants with priority placement and add the ones with *Must Select* or *Must Consider* status as applicants to job openings. You can run this process for all open job openings or for just one job opening.

See <u>Chapter 17, "Screening and Routing Applicants," (USF) Running the Priority Placement Process, page 439.</u>

At the end of the applicant screening process, score thresholds are applied to classify the candidates as qualified, well-qualified, or best-qualified. The system then considers these qualification classifications along with the applicants's priority processing status and places applicants in these four categories:

- Category 1: Qualified, well qualified, and best qualified applicants with *Must Select* priority placement.
- Category 2: Well qualified and best qualified applicants with Must Consider priority placement.
- Category 3: Best qualified applicants with no priority placement.
- Category 4: Qualified and well qualified applicants with no priority placement.

The screening rules determine which categories of applicants are included in the final ranking.

The rules enable you to include different categories for competitive applicants and noncompetitive applicants.

Delivered Priority Placement Codes

Oracle delivers the following priority placement code settings:

Priority Placement Code	Weight	Description
СТР	6	Career Transition Assistance Plan
ICT	4	Interagency Career Transition Assistance Plan
РРР	5	Priority Placement Program
RLP	3	Re-employment Priority List
RRS	5	Regional Reduction

Understanding Veterans Preference Codes

Veterans preference codes represent categories of entitlement to preference in the federal service based on active military service that was terminated honorably. Veterans preference processing is governed by the internal policies of and the regulations issued by OPM.

Veterans Preference Processing

Veterans preference code definitions include a description, a recruitment code, and the number of points to add to the applicant's screening score.

Screening for a job opening can be configured so that when an application includes a veterans preference code, the associated point value is added to that applicant's final screening score during the ranking process that produces the final Certificate of Eligibles.

Note. The veterans preference points do not affect the scores for individual screening levels, only the final cumulative score that is used for ranking.

Veteran status, which is different from veterans preference codes, can also be used as a tie-breaker during the ranking process.

Delivered Veterans Preference Codes

Oracle delivers the following veterans preference codes:

Veterans Preference Code	Recruitment Code	Points	Description
1	NV	0	Designates a nonveteran.
2	TP	5	Five-point preference that is granted to a preference- eligible veteran who does not meet the criteria for one of the types of 10-point preferences listed.
3	ХР	10	Ten-point (other) preference; granted to recipients of the Purple Heart, persons with a noncompensable service- connected disability (less than 10 percent), widow or widower, or mother of a deceased veteran, or spouse or mother of a disabled veteran.
4	СР	10	Ten-point compensable preference based on a service-connected disability of 10 percent or more, but less than 30 percent.
6	CPS	10	Ten-point compensable preference based on a service-connected disability of 30 percent or more.

Pages	Used to	Set Up	U.S.	Federal	Screening	Processes
. agee	0000.00				•••••	

Page Name	Definition Name	Navigation	Usage
Priority Placement	HRS_G_PR_PL_TBL	Set Up HRMS, Product Related, Recruiting, Screening, Priority Placement, Priority Placement	Review and configure priority placement codes.
Setup Veterans Preference	HRS_G_VET_PRF_TBL	Set Up HRMS, Product Related, Recruiting, Screening, Veterans Preference, Setup Veterans Preference	Review and configure veterans preference codes.

(USF) Setting Up Priority Placement Codes

Access the Priority Placement page (Set Up HRMS, Product Related, Recruiting, Screening, Priority Placement).

Priority Placement	
Priority Placement Code:	СТР
Priority Placement Information	Find View All First 🚺 1 of 1 🔟 Last
*Effective Date:	01/01/1980 🛐 🛨 🗕
*Status:	Active
*Description:	Career Transition Assist. Plan
*Priority Placement Weight:	6
Job Opening Types	
*Recruitment Type	Job Opening Selection Criteria
Internal	Must Consider
Merit Promotion	Must Select
Open Competition	None 💌

Priority Placement page

Priority Placement Information

Effective Date and **Status** Priority placement codes that are currently *Active* are available for use.

Description	Identifies the priority placement code. This is the description that users see when adding priority placement codes to applications or job openings.
Priority Placement Weight	A value of 1 is the highest weight. During the ranking process, an applicant with a priority placement weight of 1 will be ranked before someone with a priority placement weight of 2.
Job Opening Types	
Recruitment Type	The page lists the three types of job openings so that you can assign different priority placement processing rules for each. The three types of job openings are <i>Internal, Merit Promotion,</i> and <i>Open Requisition</i> .
	Talent Acquisition Manager identifies each of these types of job openings using the Recruitment Type field on the Job Opening page.
Job Opening Selection Criteria	Select the priority placement processing to give to applicants for each type of job opening. Choose <i>Must Select, Must Consider,</i> or <i>None.</i>

(USF) Setting Up Veterans Preference Codes

Access the Setup Veterans Preference page (Set Up HRMS, Product Related, Recruiting, Screening, Veterans Preference, Setup Veterans Preference).

Setup Veterans	Preference		
Veterans Preference:	2		
Veterans Preference Infor	mation	Find View All	First 🚺 1 of 1 🕨 Last
*Effective Date:	01/01/1900 関		+ -
Status:	Active		
*Description:	5 Point		
Short Description:	5 Point		
Recruitment Code:	TP		
Recruitment Points:	5		

Setup Veterans Preference page

Veterans Preference Information

Enter the basic information about the veterans preference. Select a recruitment code and assign the points to it.

Effective Date and Status	Veterans preference codes that are currently Active are available for use.
Description	Identifies the veterans preference code. This is the description that users see when adding veterans preference codes to applications.
Recruitment Code	Identifies the recruitment code.
	See <u>Chapter 5, "Setting Up Screening Processes," Understanding Veterans</u> <u>Preference Codes, page 84.</u>
Recruitment Points	Enter the number of points that are associated with this veterans preference code.

Chapter 6

Setting Up Candidate Gateway Sites

This chapter provides an overview of Candidate Gateway sites and discusses how to:

- Set up sites.
- Configure text on Candidate Gateway pages.

See Also

The Recruiting Solutions Using Sites red paper on My Oracle Support.

Understanding Candidate Gateway Sites

You can set up an unlimited number of applicant-facing career sites for your organization. For example, you can set up separate sites for different business units or for different countries where you employ workers, and you can then post job openings to the appropriate sites.

Internal and External Sites

Candidate Gateway presents slightly different functionality to internal and external applicants. For example, external applicants must register before applying for jobs, while internal applicants are identified through their PeopleSoft user ID and do not need to register. However, the system does *not* use site definitions to differentiate the behavior of internal and external sites. Rather, the link that the applicant uses to access the site controls whether the site appears in its internal applicant or external applicant mode.

You can access and test your sites in both internal and external mode using the following delivered navigation:

- Internal applicant mode: navigate to Self-Service, Recruiting Activities, Careers.
- External applicant mode: select Careers under the main menu.

A single site definition is associated with both the internal and external navigation paths. To choose the site definition that is associated with these navigation paths, use the site ID field on the Recruiting Installation - Applicants page.

Site-Specific Configuration Options

You can manage the look and feel of the application for each of their career sites through site-specific settings, including:

• The default resume template for the site.

If an applicant applies online without applying to a specific job opening, or if an applicant applies for a job that is not associated with a resume template, then the default resume template for the site controls the application process.

• Site-specific text labels for various page objects.

Candidate Gateway uses common HCM Text Catalog entries to define the labels for page elements such page titles, group box titles, field labels, instructional text, and error or warning messages. The architecture of the Text Catalog enables you to specify different text for different sites and for different applicant types (internal and external).

Access to External Sites

External applicants, by definition, do not have PeopleSoft user IDs. To give external users access to a site, you put a link to the site on a location such as your public website. The site definition includes a field for defining the URL for this external link.

Deployed in this fashion, the PeopleSoft instance that external users are accessing needs to have the appropriate security settings to allow the users to bypass signon. That is, a user who clicks the link is not presented with a PeopleSoft signon pages but is instead signed on using a generic guest user ID so that the user can be taken directly to the Careers Home page in Candidate Gateway.

See PeopleTools: Security Administration PeopleBook

Note. PeopleTools Tools user IDs have types. Although there is a delivered *External Job Applicant* type, this is not relevant to how external applicants access Candidate Gateway. Because external applicants access the site through a site-wide guest user ID that bypasses signon, they never have their own PeopleTools user IDs.

Accessibility Configuration

User-specific settings can make PeopleSoft applications more accessible to people with visual impairment and other disabilities. However, external Candidate Gateway users do not have individual PeopleSoft user IDs that can be personalized to use the PeopleTools accessibility mode. Instead, external users bypass standard PeopleSoft signon and use a guest user.

Therefore, to support accessibility needs, you must create a separate accessible site where the bypass user ID is personalized to use accessibility mode. Your main website should then provide an additional link to the accessibility configured site, with information that this other website should be used by applicants who are using an assistive technology screen reader.

To configure a user ID for an accessible site:

- 1. Sign in with the user ID that will be used to bypass signon when applicants access the site.
- 2. Under the main menu, select My Personalizations.
- 3. Click the Personalize General Options link.
- 4. For the Personalization Option called Accessibility Features, select Use Accessible Layout Mode.
- 5. Click the OK button to save the setting.

Setting Up Sites

To set up sites, use the Setup Site ID (HRS_SITE_ID) component.

This section provides an overview of sites, lists prerequisites, and discusses how to set up sites.

Prerequisites

Before you can set up sites, you must:

• Set up a default resume templates.

See Chapter 9, "Setting Up Recruiting Templates," Setting Up Resume Templates, page 133.

- (Optional) Set up a default resume extractor vendor.
 See <u>Chapter 10, "Setting Up Third Party Integrations," Setting Up Recruiting Vendors, page 180.</u>
- Set up portal definitions.

See PeopleTools: PeopleTools Portal Technologies PeopleBook

Page Used to Set Up Sites

Page Name	Definition Name	Navigation	Usage
Site Setup	HRS_SITE_ID	Set Up HRMS, Product Related, Recruiting, Site, Site Setup	Set up site definitions.

Setting Up Sites

Access the Site Setup page (Set Up HRMS, Product Related, Recruiting, Site, Site Setup).

Site	
Site Setup	
Site	
Site ID:	1
Description:	Default Site
Short Description:	Default
*Resume Template:	1000 Cefault
Applicant Type:	External Applicant
Country:	United States
Default Extractor:	
Default Set ID:	SHARE
Default Portal:	EMPLOYEE
External ERP Site:	
Test Links	
Internal Link	
	esoft.com/psp/fg910dvInt/EMPLOYEE/HRMS/c/HRS_HRAM_EMP.HRS_ [2] CE_HM_PRE&Action=A&SiteId=1
External Link	
	esoft.com/psp/fg910dvInt/EMPLOYEE/HRMS/c/HRS_HRAM.HRS_CE.GB [계 M_PRE&Action=A&SiteId=1

Site Setup page

Site IDDisplays the unique identifier for the site definition. This is used as a
parameter on the URL to direct users to the correct site.Resume TemplateSelect the default resume template for the site. If an applicant applies
without a job opening, or if an applicant applies for a job opening that is not
associated with a resume template, the system uses the default resume
template to control the application process.

Applicant Type	This field is informational only. Select <i>Employee</i> , <i>External Applicant</i> , or <i>Non-Employee</i> to indicate which type of applicant uses this site.
	This setting does not control the applicant type that is assigned to applicants who submit applications on this site; that value is determined by the navigation used by the applicant. For example, if an applicant accesses the site using an external link, the applicant is created as an external applicant.
Country	Select a country to use for resume extraction. Some resume extractors require a country to format names and addresses.
Default Extractor	Select a default resume extractor. The system uses the resume extractor that you specify here to extract information from applicant's resumes. If you do not select a value, applicants can attach resumes but the system cannot extract information from the resumes.
Default SetID	Select a default setID. The system uses this setID to determine the appropriate information to present to applicants that access the system through this site.
Default Portal	Select the default portal. The system uses this portal, and the node associated with the portal, to define the URL for redirection to this site from your public website or other places where you place links to the site.
External ERP Site (external employee referral program site)	Identify the site where external candidates are directed to view and update information when their application is submitted through an employee referral or automatch search.
Test Links	The system uses the specified test links to verify the layout of a particular site and to easily retrieve the full URL path. The separate URLs, Internal Link and External Link, allow the site to be viewed from either an internal employee's perspective or as an external applicant, respectively.

Configuring Text on Candidate Gateway Pages

This section provides an overview of Text Catalog configuration for Candidate Gateway and describes how to:

- Identify Text IDs for specific page elements.
- Maintain Text Catalog entries for Candidate Gateway.

Note. This section provides summary information about using the Text Catalog for Candidate Gateway. Refer to the complete Text Catalog documentation for more detailed information.

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring the Text Catalog.

Understanding Text Catalog Configuration for Candidate Gateway

The Text Catalog is a common framework for controlling text that appears on HRMS self-service pages. The Text Catalog enables you to modify page text through configuration rather than customization. Use the Text Catalog to configure page elements such as field labels, button names, links, page instructions, and warnings.

Context-Sensitive Text

Entries in the Text Catalog are context-sensitive, allowing a particular piece of text on a page to vary. The owner ID of each Text Catalog entry determines which fields are used to control the variable text. The Text Catalog entries for Candidate Gateway have the owner ID *HRAM*, and the context keys are Site ID and Applicant Type. This means that you can vary the text by any combination of site and applicant type. For example, if you have different sites in different countries, and the terms & agreements for submitting an application vary by country, then you can use the Text Catalog to specify appropriate terms & agreements text for each country's site.

Text Catalog IDs

To modify the text for a particular page element, you need to know its Text Catalog ID. To help you, the Configure Text Catalog page includes a Display Text ID check box that you can select to make Candidate Gateway pages display the Text Catalog ID rather than the text.

Page Used to Maintain Text Catalog Entries for Candidate Gateway

Page Name	Definition Name	Navigation	Usage
Configure Text Catalog: General	HR_SSTEXT_CFG	Set Up HRMS, Common Definitions, Text Catalog and Notepad, Configure Text Catalog, Configure Text Catalog	Control whether Candidate Gateway pages display context-sensitive text or Text Catalog IDs.
Maintain Text Catalog	HR_SSTEXT_TEXT	Set Up HRMS, Common Definitions, Text Catalog and Notepad, Maintain Text Catalog, Maintain Text Catalog	Define text catalog entries, and define the values for context-sensitive keys.

Identifying Text IDs for Specific Page Elements

Access the Configure Texts Catalog page (Set Up HRMS, Common Definitions, Text Catalog and Notepad, Configure Text Catalog, Configure Text Catalog, General).

Applications General Key	/ <u>1</u> Key <u>2</u> Key <u>3</u> Key <u>4</u>	Key 5	Key <u>6</u>		
)bject Owner dentifier	Description	Sub ID	Description	Display Text Id	
HJPM 🔍	HCM Profile Management	JP4	Job Profiles by Catalo		-
HJPM 🔍	HCM Profile Management	JP5	Installation Parms		-
HJPM 🔍	HCM Profile Management	JP6	Find a Profile		-
HJPM	HCM Profile Management	PGRP	Profile Group Build		-
HJPM	HCM Profile Management	SRCH	Verity Search		-
HRAM	RS Applicant Manager		RS Candidate Facing I		-
HRPM	RS Open Position Manager	CRJO	RS Job Opening		-
HRS	RS Common Components		RS Admin Keys		-
HTLS	TL Scheduling		Time and Labor		-
HWCS	Workforce Comp Solutions	ALRT	eCompensation Alerts		-
HWCS	Workforce Comp Solutions	ECM	eComp Mgr Desktop		-
HWCS	Workforce Comp Solutions	GRID	eCompensation Grid L		-
HWCS	Workforce Comp Solutions	MSS	eComp Manager Self \$		-
HWCS	Workforce Comp Solutions	TRWS	Total Rewards Templa		-
HWCS	Workforce Comp Solutions	TRWT	Total Rewards Templa		-

Configure Text Catalog page

Display Text ID

To make Candidate Gateway pages display the text IDs for all Text Catalog objects, locate the row for the Object Owner Identifier HRAM and select the Display Text ID check box.

Examples

This illustration shows the Choose Resume page in Candidate Gateway as it normally appears to applicants (that is, with the Display Text ID check box deselected):

Apply Now
Choose Resume
Resume Options
How would you like to proceed?
O Upload a new resume
C Apply without using a resume
C Copy and paste resume text
Continue Return to Previous Page

Choose Resume page in regular display mode

If you select the Display Text ID check box for the *HRAM*, the Choose Resume page, the page shows text IDs rather than text for every page elements that is controlled by the Text Catalog:

[HRAM_CERESOPT_PT02] [HRAM_CERESOPT_PT01]	
[HRAM_CE_GRPB_14] [HRAM_CERES_PT01]	
O Upload a new resume O Apply without using a resume O Copy and paste resume text	
Continue Return to Previous Page	

Choose Resume page in Text ID display mode

In this example, both parts of the page title, the group box title, and the "How would you like to proceed" text that introduces the radio buttons are all controlled by the Text Catalog. If you wanted to change the text that introduces the radio buttons, you could see that you would need to modify Text Catalog entry *HRAM_CERES_PT01*.

Maintaining Text Catalog Entries for Candidate Gateway.

Access the Maintain Text Catalog page (Set Up HRMS, Common Definitions, Text Catalog and Notepad, Maintain Text Catalog, Maintain Text Catalog).

Maintain Tex	kt Catalog		
RS Applicant Manag	-	Sub ID:	
Text ID:	HRAM_CE_SINST_27	Usage:	Grid/Scroll Heading
Description:	Job Posting Information		1
Text Entries		<u>Find</u> Vie	w All First 🚺 1 of 1 🗋 Last
Effective Date:	01/01/1900 🛐		+ -
Context Keys and	Text	Find View 1	First 🗹 1-3 of 3 🕨 Last
Site ID:		Q	+ -
Applicant Type:		Q	
Job Posting Infor	mation		2¢
View/Edit as HTM	L		
Site ID:	100		+ -
Applicant Type:		Q	
Open Positions			2%
I			
View/Edit as HTMI	<u>_</u>		
Site ID:	110	Q	+ -
Applicant Type:	icinosa Instituta		
Jobs at Global Bu	Ismess institute		
View/Edit as HTM	L		
	-		

Maintain Text Catalog page

Owner ID (label is invisible)

On this illustration, the text *RS Applicant Manager* is the description for the owner ID *HRAM*, which identifies this as a Candidate Gateway entry in the catalog.

Context Keys and Text

Site ID and Applicant Type	Site ID and Applicant Type are the pre-defined context keys for Candidate Gateway.
	Each text ID and effective date combination needs a default value where both the Site ID and Applicant Type fields blank. The system uses this entry when context-specific text does not exist.
	For example, if you have five sites, and four of them use the same set of terms & agreements while one uses a different set of terms & agreements, then you need to create one site-specific entry for the unique site, but you do not need to create entries for the other four sites, which will all use the default text.
<text box=""></text>	Although the text catalog framework allows long text entries, the page element where the text appears at runtime can have a lower character limit, resulting in truncated text. Any time you change a delivered text catalog entry, be sure to test your change. If the entry is truncated, you must shorten your text.

Chapter 7

Setting Up Recruiting Roles and Security

This chapter provides overviews of row-level security for recruiting and of recruiting role types. This chapter then discusses how to assign PeopleTools roles to recruiting roles types.

Understanding Row-Level Security for Recruiting

This overview discusses:

- Access to job opening data.
- Access to applicant data.

Access to Job Opening Data

The following people have access to job openings:

- The creator of a job opening, as indicated on the Job Opening page.
- Users who have access to the job opening's department through the HRMS department security tree.
- Approvers and their proxies, if job opening approvals are active.
- The recruiting team, consisting of the people (recruiters, hiring managers, interviewers, interested parties, and screening team members) who are individually identified in the job opening.

Establishing a Permission List for Hiring Team Members

When a member of the recruiting team for a particular job opening accesses the job opening, the system determines if the user has a permission list with recruiting team access before granting access to the opening. To set up this permission list, do the following:

- 1. Create or identify a permission list that you will use for this purpose.
- 2. Access that permission list in the Security by Permission List page (Set Up HRMS, Security, Core Row Level Security, Security by Permission List, Security by Permission List).
- 3. In the Security Set field, select RSOPN.
- 4. In the Security Type grid, add a row for the security access type 031 (Recruiting Team).

The system displays EmplID for the Key 1 field. Leave this field empty. This security access type has hard-coded key values so you do not need to specify any EmplID values.

To associate the permission list with individual users, assign the permission list to one or more roles, and assign the roles to those users who need recruiting team access.

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Administering HCM Security," Granting Data Access to Permission Lists by Field Value.

Access to Applicant Data

Users with access to the Find Applicant pages can access data for all applicants. When searching for applicants, users can select the "Search My Applicants" check box to filter the search results to include only applicants who are associated with the user's jobs.

Users who do not have access to the Find Applicants pages can still access applicant data using links on the Job Opening page. Thus, the data of applicants who are associated with a job opening is available to those with access to the job opening.

Understanding Recruiting Role Types

Standard PeopleSoft security gives users access to pages and data through the use of roles and permission lists.

By associating standard PeopleTools roles with *recruiting role types*, you can grant users additional recruiting-specific privileges.

Some privileges are granted to users with any recruiting role type, while others are granted to users with particular role types.

Note. Although there are seven predefined recruiting role types, most of the delivered recruiting role types do not grant specific privileges beyond those that are given to users with any recruiting role type.

Cloning Privileges

Users who are associated with any recruiting role type have access to the clone job opening function on the Job Opening page.

Hiring Team Association Privileges

Job opening hiring teams include five groups of team members. The ability to add users to certain groups is limited based on whether the users are associated with certain recruiting role types.

The following table lists the hiring team groups and describes any associated recruiting role type requirements:

Hiring Team Group	Recruiting Role Type Requirements
Recruiter	Only users who are associated with a recruiting role type can be added to the hiring team as recruiters.
	Users can be associated with any recruiting role type; it is not necessary to be associated with the <i>Recruiter</i> recruiting role type.

Hiring Team Group	Recruiting Role Type Requirements
Hiring Manager	Only users who are associated with the <i>Hiring Manager</i> recruiting role type can be added to the hiring team as hiring managers.
Interviewer Interested Party Screening Team	Association with a recruiting role is <i>not</i> required for users to be added to the hiring team in these capacities. For example, any user can be added as an interviewer, even if that user is not associated with a recruiting role.

Administrator Privileges

Users who are associated with the Recruitment Administrator recruiting role type can:

- Access the eligibility & identity information for applicants.
- Change the status of draft applicants.
- Access a comprehensive list of person profiles in a job opening.

Other users can only access their own profile or the profiles of their direct reports.

- Change the recruitment template on a job opening.
- Edit job opening details when the job opening status is Hold, Cancelled, or Closed.
- Override the status of a job opening.

Non-administrators can close, cancel, or place job openings on hold by performing certain actions that are available on the Find Job Openings page, but they cannot directly edit the status field in the job opening.

• Take action on other users' pending approvals.

Administrators can take action on a pending approval by directly editing the Status field on the job opening or by overriding the approval status on the approvals section of the job opening. However, administrators cannot use the approval-related actions on the Find Job Openings and Browse Job Openings pages to take action on other users' pending approvals.

See Also

PeopleTools: Security Administration PeopleBook

Assigning PeopleTools Roles to Recruiting Role Types

To set up recruiting roles, use the Recruiting Recruiter Roles (HRS_ROLE_DEFN) component.

This section discusses how to assign PeopleSoft roles to recruiting role types.

Page Used to Assign PeopleTools Roles to Recruiting Role Types

Page Name	Definition Name	Navigation	Usage
Recruiting Roles	HRS_ROLE_DEFN	Set Up HRMS, Recruiting, Recruiting Roles, Recruiting Roles	Associate PeopleTools roles with recruiting role types.

Assigning PeopleTools Roles to Recruiting Role Types

Access the Recruiter Roles page (Set Up HRMS, Recruiting, Recruiter Roles, Recruiter Roles).

Recruiting Roles		
*Recruiting Role Type: *Effective Date:	Recruitment Admin	nistrator 🔽
Roles		Customize Find 🏧 🛗 First 🚺 1 of 1 🖸 Last
Role Name		Description
Recruitment Administrator	Q.	[WF] Recruitment Administrator

Recruiter Roles page

Recruiting Role Type	The system identifies recruiting users through the user of recruiting role types.
	The seven delivered recruiting role types are <i>Recruitment Administrator</i> , <i>Federal Recruiter, Hiring Manager, RS Approval Administrator</i> (recruiting solutions approval administrator), <i>RS Technical Administrator</i> (recruiting solutions technical administrator), <i>Recruiter,</i> and <i>Recruiting User</i> .
	Users with PeopleTools roles that are associated with <i>any</i> of the recruiting role types have cloning privileges and can be added to a job opening as a recruiter.
	Users with PeopleTools roles that are associated with the <i>Hiring Manager</i> recruiting role type can be added to a job opening as a hiring manager.
	Users with PeopleTools roles that are associated with the <i>Recruitment Administrator</i> recruiting role type have additional privileges.
	See <u>Chapter 7, "Setting Up Recruiting Roles and Security," Understanding</u> <u>Recruiting Role Types, page 100.</u>
Recruiter Roles	Select the PeopleTools roles that you want to associate with a particular recruiting role type.

See Also

Appendix B, "Delivered Permission Lists and Roles for Talent Acquisition Manager," page 759

Chapter 8

Setting Up Additional Recruiting Definitions

This chapter describes how to:

- Set up recruiting locations.
- Set up the job posting description library.
- Set up application attachments.
- Set up contact methods.
- Set up interview definitions.
- Set up job offer components.
- Set up online job offer attachments.
- Set up the data transfer to HR.

Setting Up Recruiting Locations

To set up recruiting locations, use the Recruiting Locations (HRS_LOCATION) component.

This section provides an overview of recruiting locations and discussed how to define recruiting locations.

Understanding Recruiting Locations

Recruiting locations enable you to classify jobs geographically in the way that makes the most sense to your recruiting process. Recruiting locations can be as broad or narrow as you like.

When jobs are posted to Candidate Gateway, the recruiting location is visible to applicants, and applicants can search for jobs based on recruiting location. Applicants can also specify recruiting location preferences in their applications, and recruiters can then use that as search criteria when searching for applicants.

A job opening with multiple target openings can be associated with multiple recruiting locations. You must provide the number of target openings for each recruiting location. When a job opening has multiple recruiting locations, Candidate Gateway displays the text *Multiple locations* for that job posting.

Recruiting locations can contain other recruiting locations. For example, you could set up a recruiting location for California that contains recruiting locations for Northern California and Southern California. When applicants search for jobs in California, the search results include jobs that are associated with the California recruiting location, the Northern California recruiting location, and the Southern California recruiting location.

Recruiting locations can also be associated with the physical location that you set up in your core Human Resources tables. Through this association, recruiting locations are associated with the country for the physical location. The system uses this information to determine whether to display USA-specific data elements (self-identification details for collecting gender and ethnicity information) to applicants when they apply for jobs using Candidate Gateway. When determining if a job opening is in the USA, the system looks at the physical locations for all of the job's recruiting locations.

Page Used to Set Up Recruiting Locations

Page Name	Definition Name	Navigation	Usage
Recruiting Locations	HRS_LOCATION	Set Up HRMS, Product Related, Recruiting, Recruiting Locations, Recruiting Locations	Define the geographical categories that will be exposed to applicants, and associate those recruiting- specific locations with physical locations and with other lower-level recruiting locations.

Defining Recruiting Locations

Access the Recruiting Locations page (Set Up HRMS, Product Related, Recruiting, Recruiting Locations, Recruiting Locations).

Recruiting	Locati	ons				
Location Details	6					
Recruiting Locat	tion:	100	5			
*Status:		Active	•			
*Description:		United States]		
Short Descriptio	n:	US				
Location			<u>Customiz</u>	🥲 Find 💷 🛗 🛛 First 🚺 1-4 of 4	Last	t
Location	Description	1	Recruiting Location	Description		
1			1120 🔍	West	+ -	•
2			1125 🔍	Midwest	+ -	•
3			1130 🔍	East	+ -	•
4 L0001 🔍	Northeaste	rn Region	Q.		+ -	·
				1		

Recruiting Locations page

Location or Recruiting Location	In each row, select either a physical location or another recruiting location, but not both.
	Define physical locations using the Location (LOCATION_TABLE) component.
	See <i>PeopleSoft HCM 9.1 Application Fundamentals PeopleBook</i> , "Setting Up Organization Foundation Tables," Establishing Locations.

Setting Up the Job Posting Description Library

To set up the job posting description library, use the Posting Descriptions (HRS_JO_PST_DSC_TBL) and Posting Descriptions Library (HRS_JO_PST_LIB_TBL) components.

This section provides an overview of the job posting description library and discusses how to:

- Define posting description types.
- Create posting descriptions.

Understanding the Job Posting Description Library

Job postings that are posted to a job board or intranet include a description of the job opening. When you create job postings, you can optionally bring in predefined content from the posting description library. Using content from the library enables you to standardize job posting content.

Note. You also have the option to enter freeform text and graphics when you create a job posting.

Posting description types are categories of boilerplate text. For example, you may want categories for information that:

- Positions your organization within the market.
- Outlines the job responsibilities.
- Lists the qualifications that an applicant must have for this job opening.
- Explains how to apply for the job opening.

When you create a library entry, you associate it with a specific description type.

Pages Used to Set Up the Job Posting Description Library

Page Name	Definition Name	Navigation	Usage
Posting Description Type	HRS_JO_PST_DSC_TBL	Set Up HRMS, Product Related, Recruiting, Posting Descriptions, Posting Description Type	Define posting description types.
Posting Description Library	HRS_JO_PST_LIB_TBL	Set Up HRMS, Product Related, Recruiting, Posting Description Library, Posting Description Library	Create posting descriptions.

Defining Posting Description Types

Access the Posting Description Type page (Set Up HRMS, Product Related, Recruiting, Posting Descriptions, Posting Description Type).

Posting Description Type				
Description Details				
*Description Type:	Q			
Status:	Active			
Short Description:	Quals			
*Description:	Qualifications			
Comment:				

Posting Description Type page

Creating Posting Descriptions

Access the Posting Description Library page (Set Up HRMS, Product Related, Recruiting, Posting Description Library).

Posting Descr	iption Library
Description Details	
Description Type: Description ID:	I Other Information 002
*Description Label:	Promotion Potential
Description:	i Q, ≜ 🐇 № 🛍 ← → ₩ ♣ 🗏 📰 🖾 🙈 👧 Ω]
	Format Font Size B I U abe
	i ≡ ≡ ≡ Ξ Ε ∉ ∉ A _i • A •
	Identification of promotion potential in this position does not constitute a commitment or an obligation on the part of management to promote the employee selected at some future date. Promotion will depend upon administrative approval and the continuing need for an actual assignment and performance of higher level duties.
	ب ا

Posting Description Library page

Description Label	Enter the text to be used as a section label in the job posting.	
Description	Enter content for this library entry. Content can include text and graphics, and can be formatted to enhance the presentation of your content.	

Setting Up Application Attachments

To set up application attachments, use the Attachment Types (HRS_ATCHTYPE_TBL) component.

This section provides an overview of attachment types and discusses how to define attachment types.

Understanding Attachment Types

The Attachment Types component enables you to set up classifications for attachments to applicant records. When applicants add attachments in Candidate Gateway, they must indicate the attachment type by selecting from the types that you set up here. When recruiters upload attachments on the Application Details page, they can optionally indicate the attachment type.

Every attachment type is associated with a specific *processing type* that controls how the system works with that type of attachment. The following table describes the four processing types:

Processing Type	Description
Resume	Only one attachment type can be associated with this value. Both Candidate Gateway and the recruiter-facing Application Details page have specific interfaces for uploading resume attachments; users cannot upload resume attachments in the general-purpose Attachments grids.
References	Only one attachment type can be associated with this value. Applicants enter reference attachments in the general-purpose Attachments grids in Candidate Gateway (on the My Career Tools page), while recruiters enter them in the general-purpose Attachments grid on the Application Details page. No special processing exists for reference attachments; this processing type is strictly for identification.
<i>OIF Other</i> (open integration framework other)	Only one attachment type can be associated with this value. The attachment type with the <i>OIF Other</i> processing type is applied to all non-resume attachments that come from third-party vendors via the open integration framework.
Other	This is the only processing type that can be associated with more than one attachment type. Therefore, implementers use this value when establishing custom attachment types. Examples might include cover letters, transcripts, or work samples. Applicants and recruiters enter <i>Other</i> attachments in the same general-purpose attachment grid where they add Reference attachments.

When you set up attachment types, you always indicate the processing type and the URL where those documents are stored. For *Other* attachment types, you also indicate the maximum number of attachments that applicants can supply per application.

See Also

PeopleSoft Candidate Gateway 9.1 PeopleBook, "Using Candidate Gateway," Reviewing Career Tools

PeopleSoft Candidate Gateway 9.1 PeopleBook, "Using Candidate Gateway," Entering References

Page Name	Definition Name	Navigation	Usage
Attachment Type Setup	HRS_ATTACHTYPE_TBL	Set Up HRMS, Product Related, Recruiting, Attachment Types, Attachment Type Setup	Define types of attachments for applications.

Page Used to Set Up Application Attachments

Defining Attachment Types

Access the Attachment Type Setup page (Set Up HRMS, Product Related, Recruiting, Attachment Types, Attachment Type Setup).

Attachment Types		
Attachment Type Code: 001		
Attach Details		
*Status:	Active	
*Description:	Resume attachments	
Short Description:	Resumes	
Maximum Occurrences/Applicant:	1	
*URL Identifier:	HRS_APP_ATCH	🔍 Edit
URL:	RECORD://HRS_ATTACHMENTS	
*Processing Type:	Resume 🔽	

Attachment Type Setup page.

Maximum Occurrences/Applicant	Enter the maximum number of attachments that an applicant can submit for this specific attachment type. When the processing type is <i>Resume</i> , the maximum is <i>1</i> , and this field is not enterable.
URL Identifier	Select the URL address that will house the documents for this attachment type.
Edit	Click the link to display the URL Maintenance page, which you can use to define the URL address that is used to store the attachments.
URL	Displays the URL address for the selected URL identifier.

Processing Type	Identifies the type of attachment. This is used when the applicant applies for a job online or submits additional attachments, or you request references from the applicant.
	There can be only one attachment type for each of these processing types: <i>Resume, Reference,</i> and <i>OIF Other.</i>
	For the <i>Resume</i> attachment type, the Maximum Occurrences/Applicant value must be <i>1</i> , indicating that an applicant can upload only one resume per application.
	To create additional classifications of attachments, use the <i>Other</i> processing type. For example, attachment types for cover letters or transcripts have this processing type.

Setting Up Contact Methods

To set up contact methods use the Contact Method Types (HRS_CNTCT_MTHD) component.

This section provides an overview of recruitment letters and discusses how to define contact method types.

Page Used to Set Up Contact Methods

Page Name	Definition Name	Navigation	Usage
Contact Methods	HRS_CNTCT_MTHD	Set Up HRMS, Product Related, Recruiting, Relationship Management, Contact Method Types, Contact Methods	Define contact method types for reporting and classification purposes.

Defining Contact Method Types

Access the Contact Methods page (Set Up HRMS, Product Related, Recruiting, Relationship Management, Contact Method Types, Contact Methods).

Contact Methods				
Contact Methods	Customize Find View All	🧖 🛗 First 🚺 1-11 of 11		ast
*Contact Method Name		Short Name		
Inbound Chat		Chat	+	-
Inbound Letter		Letter	+	-
Inbound Email		Email	+	-
Inbound Phone		Phone	+	-
Inbound Fax		Fax	+	-
Inbound Web		Web	+	-
Outbound Letter		Letter	+	-
Outbound Email		Email	+	-
Outbound Phone		Phone	+	-
Outbound Fax		Fax	+	-
Outbound Web		Web	+	-

Contact Methods page

Contact Method Enter a contact method description. Many forms of contact take place outside of the system; users select the contact method when manually entering information about communication with an application.

PeopleSoft delivers these contact methods. You can add as many as you like.

Setting Up Interview Definitions

To set up interview definitions, use Interview Types (HRS_INT_LVL_TBL), Interview Evaluation Category (HRS_INT_CTG_TBL), and Interview Evaluation Ratings (HRS_INT_RTG_TBL) components.

This section provides an overview of interview evaluation setup and discusses how to:

- Create interview types.
- Create interview evaluation categories.
- Create interview ratings.

Understanding Interview Definitions

Set up these three types of definitions for interviews:

• Interview types categorize the interview.

Example of interview types might be in house, campus, and phone.

• Interview categories define the areas in which you want to evaluate applicants.

PeopleSoft delivers four categories: Communication Skills, Education/Training, Work Experience, and Technical skills. You can add as many categories as necessary.

• Interview ratings define how you rate the applicant within the category and associate a score to that rating.

PeopleSoft delivers three ratings: Excellent, which has a score of 2; Average, which has a score of 1; and Not Qualified, which has a score of 0. You can add as many ratings as necessary.

After you set up these tables, you can create interview evaluation templates. Interview evaluation templates enable you to group categories and ratings so that you can create interview evaluations that target a specific job opening or group of job openings.

See Chapter 9, "Setting Up Recruiting Templates," Setting Up Interview Evaluation Templates, page 165.

Page Name	Definition Name	Navigation	Usage
Interview Types	HRS_INT_LVL_TBL	Set Up HRMS, Product Related, Recruiting, Screening, Interview Types, Interview Types	Create interview types.
Interview Evaluation Category	HRS_INT_CTG_TBL	Set Up HRMS, Product Related, Recruiting, Screening, Interview Evaluation Category, Interview Evaluation Category	Create interview evaluation categories.
Interview Evaluation Ratings	HRS_INT_RTG_TBL	Set Up HRMS, Product Related, Recruiting, Screening, Interview Evaluation Ratings, Interview Evaluation Ratings	Create interview ratings.

Pages Used to Set Up Interview Definitions

Creating Interview Types

Access the Interview Types page (Set Up HRMS, Product Related, Recruiting, Screening, Interview Types, Interview Types).

Interview Typ	es			
Interview Type:	С			
Interview Levels		Find View All	First 🚺 1 of 1	Last
*Effective Date:	01/01/1900			+ -
*Status:	Active 💌			
*Description:	Campus]		
Short Description:	Campus			

Interview Types page

Enter a description that describes how an interview may be conducted. This description is used when you schedule an interview.

Creating Interview Evaluation Categories

Access the Interview Evaluation Category page (Set Up HRMS, Product Related, Recruiting, Screening, Interview Evaluation Category, Interview Evaluation Category).

Interview Evaluation Category			
Evaluation Category:	1		
Interview Evaluation Ca	tegory	Find View All	First 🚺 1 of 1 🖸 Last
*Effective Date: *Status: *Description: Short Description:	01/01/1900 Active Communication Skills Communicat		

Interview Evaluation Category page

Creating Interview Ratings

Access the Interview Evaluation Ratings page (Set Up HRMS, Product Related, Recruiting, Screening, Interview Evaluation Ratings, Interview Evaluation Ratings).

Interview Evaluation Ratings		
Evaluation Rating:	1	
Interview Evaluation	Ratings	Find View All First 🗹 1 of 1 🖸 Last
Effective Date: *Status:	01/01/1900 🛐 Active	+ -
*Description:	Excellent	
Short Description:	Excellent	
Score:	2	

Interview Evaluation Ratings page

Score

Enter a score for this evaluation rating.

Setting Up Job Offer Components

To set up job offers, use the Offer Component Type (HRS_OFF_TYPE_TBL) and Offer Component (HRS_OFF_CMPNT_TBL) components.

This section provides an overview of job offer setup and discusses how to:

- Create job offer component types.
- Enter job offer component information.

Understanding Job Offer Setup

This section provides an overview of job offer setup.

Components of Pay

Often, the compensation package in a job offer includes multiple elements, of which the base salary is just one component. You might offer applicants a bonus, stock options, or car allowances in addition to a salary. To track all elements of job offers, you need to set up job offer components and job offer component types for your organization.

Use job offer component types to group similar offer components. For example, you might have a type for the salary job offer components. Hiring managers, recruiters, and recruiting administrators select from the predefined components when entering applicant job offers.

See Chapter 19, "Making Job Offers," page 529.

Attachments for Online Job Offers

When you post a job offer to Candidate Gateway, you can post not only the offer letter, but also additional relevant attachments. These can be applicant-specific, or they can be general-purpose documents such as proof of citizenship forms or information related to your organization's employment policies.

To define the organization-level attachments that recruiting users will be able to add to job offers, you use the attachments framework that is a common component for all PeopleSoft HCM applications.

The attachments framework categorizes attachments as one of three types:

- Attachment: an electronic file such as a PDF document.
- *URL*: a link to a file or web sites
- *Document definition:* a placeholder for a file attachment, URL, or note that the person creating the job offer will add on the fly.

To set up job offer attachments using the attachments framework:

1. Access the Define Attachments page (Set Up HRMS, Common Definitions, Attachments, Define Attachments) and create the attachment.

Use this page to upload a file, enter a URL, or create a document definition, depending on the type of attachment you are defining.

You also use this page to enter an attachment description and define which roles can access the attachment.

2. Access the Maintain Definitions page (Set Up HRMS, Common Definitions, Attachments, Maintain Definitions) for the object owner HRAM, and associate individual attachments with specific key values such as specific business units or companies.

For example, if you upload country-specific proof of citizenship forms, then you use this page to associate each uploaded file with the correct country. This ensures that a recruiter who is selecting attachments to add to the offer will be able to access only attachments that are appropriate for the specific job opening.

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring Attachments.

Page Name	Definition Name	Navigation	Usage
Offer Component Type	HRS_OFF_TYPE_TBL	Set Up HRMS, Product Related, Recruiting, Offer Component Type, Offer Component Type	Create the job offer component types that you use to group offer components.
Offer Component	HRS_OFF_CMPNT_TBL	Set Up HRMS, Product Related, Recruiting, Offer Component, Offer Component	Enter job offer component information.

Pages Used to Set Up Job Offers

Creating Job Offer Component Types

Access the Offer Component Type page (Set Up HRMS, Product Related, Recruiting, Offer Component Type, Offer Component Type).

Offer Component Type		
Offer Type: K(000001	
Offer Component Type	<u>Find</u> View All Firs	t 🖪 1 of 1 🗈 Last
*Effective Date:	01/01/1900	+ -
*Status:	Active	
*Description:	Base	
Short Description:	Base	
Role Name:		Q
	Base Salary Indicator	

Offer Component Type page

Role Name	Select the role that is responsible for administering the offer component type. For example, if you create a component type for stock options, you would link this to the stock administrator role.
	If you set up email workflow, the system sends an email to the person with the selected role to notify that person of new hires.
	See PeopleTools: Security Administration PeopleBook
Base Salary Indicator	Select this check box if the component type forms part of the base salary. The system uses this check box to calculate the total base salary. When a job offer is entered, the system checks whether the base salary exceeds the maximum salary grade range for the job. You define the salary grades for a job opening on the Salary Grades page.

Entering Job Offer Component Information

Access the Offer Component page (Set Up HRMS, Product Related, Recruiting, Offer Component, Offer Component).

Offer Compon	ent	
Offer Component:	K000001	
Offer Component		Find View All First 🖬 1 of 1 🖸 Last
*Effective Date: *Status:	01/01/1900 3 Active	+ -
*Description:	Base Salary	
Short Description:	Base Sal	
*Offer Type:	Base	💌 🗖 Cash
Frequency:	Monthly	•
Currency Code:	USD 🤍 US	JS Dollar

Offer Component page

Offer Type	Select the type of offer from the available component types. Define component types on the Offer Component Types page.
Cash	Select this check box if the offer component is received as cash. For example, base salary is a cash component, so you would select this check box, but for stock options, you would leave the check box deselect because stock options are not paid out as cash.
	When this check box is selected, the system will verify that the frequency and currency codes are defined on Offer Component page.
	This check box appears on the Offer Details page.
Frequency	Enter the frequency at which this component will be paid.
Currency Code	Enter the currency that will be used to pay this component.

Setting Up Online Job Offer Attachments

This section provides an overview of online job offer attachments and describes how to invoke custom attachment processing.

Understanding Online Job Offer Attachments

When you enable online job offers (posting job offers to Candidate Gateway), the system provides the ability to post attachments with the job offer.

Any offer letter that a recruiter generates is automatically added to the offer's list of attachments, but the recruiter can also add additional attachments. A standard attachment interface enables the recruiter to attach local files. Additionally, the PeopleSoft HCM attachment framework enables recruiters to select attachments from a predefined library of job offer attachments. On the job offer pages, these are referred to as *organizational attachments*.

See Chapter 19, "Making Job Offers," page 529.

Benefits of the Common Attachments Framework

Using the common attachment framework enables you to:

- Ensure that recruiters have access to current versions of standard documents.
- Enable recruiters to pick from a list of appropriate documents rather than having to remember what documents are available.
- Define different lists of attachments for different contexts, such as different business units, regulatory regions, or job codes.

Types of Documents in the Attachment Framework

Generally, we think of "attachments" as file attachments. However, the attachment framework supports three types of objects. Only two of these are commonly used as job offer attachments:

- File attachments.
- URLs (links).

The third object supported by the attachment framework is known as a document definition. Document definitions are *not* typically used in recruiting. They are empty placeholders that are used to collect specified types of information from self-service users. (For example, the self-service process for applying for a medical leave might include a document definition for a completed medical form, which the employee is responsible for uploading.)

If you were to create a document definition for a job offer, the recruiter (and not the applicant) could put file attachments, URLs, or text notes into the placeholder. But because the recruiter can add files attachments directly to the offer and can incorporate URLs and text notes into the offer letter, using document definitions for this functionality normally adds complexity without providing any benefit.

Note that the applicant who views the offer in Candidate Gateway can see any files, URLs, or notes that a recruiter puts into a document definition, but the applicant cannot use the document definition to add information to the system. Instead, the online job offer page provides a separate mechanism that the applicant uses to upload completed forms or send messages to the recruiter.

Establishing a Context-Sensitive Attachment Library

The *PeopleSoft HCM Application Fundamentals PeopleBook* provides complete documentation for using the common attachment framework to create an attachment library. The key steps for defining job offer attachments are as follows:

1. Go to the Define Attachments page (Set Up HRMS, Common Definitions, Attachments, Define Attachments) to create the attachment and to list the roles that have access to the attachment.

When you create the attachment, you identify it as a file attachment or a URL, and you either upload the file attachment or enter the URL.

2. Go to the Maintain Definitions page (Set Up HRMS, Common Definitions, Attachments, Maintain Definitions) and access the record for the *HRAM* (HR Applicant Manager) owner ID.

The owner ID controls which PeopleSoft HCM business process can access the attachment. The *HRAM* owner ID identifies attachments that are available for job offers.

3. Establish the contexts in which attachments are to be available, and associate specific attachments with each context.

As delivered, the *HRAM* owner ID has context keys for Business Unit, Company, Department SetID, Department, Job Code SetID, Job Code, Job Family, Position Number, Location SetID, Location Code, and Regulatory Region. The attachment framework enables you to modify the context keys to suit your business requirements.

The following illustration shows the Maintain Definitions page for the *HRAM* owner ID. In this illustration, the All Values check box is selected for all of the context keys, so the listed attachments will be available for all job openings, regardless of the business unit, company, and so forth.

Maintain Definitio	ons								
Owner ID: HRAM									
Sub Id: JOFF									
Definition						E	ind View All First	🔇 1 of 1	Last
*Effective Date:	01/01/2000	31	*St	atus:	A	ctive 💌			+ -
Context						Find Viev	/ All First 🚺 1 of 1	Last	
*Sequence Number:	1							+ -	
Context Keys				<u>Person</u>	alize Find	First 🚺	1-11 of 11 🖸 Last		
Key Field		Key Val	ue	Key Date	•	Key Number	All values		
1 Business Unit							V		
2 Company									
3 Department SetID									
4 Department									
5 Job Code SetID									
6 Job Code									
7 Job Family									
8 Position Number									
9 Location SetID							V		
10 Location Code							V		
11 Regulatory Region									
Attachments			Pers	onalize F	ind View /	All 🗖 🛗 🛛 First 🛛	🛾 1-4 of 4 🕨 Last		
*Configuration ID			*Sequence		*Group B	ох			
1 HRS_BENE_LNK		Q		1	None	•	+ -		
2 HRS_DRUGTEST_	LNK	Q		2	None	•	+ -		

Maintain Definitions page showing the context keys for job offers attachments

To add attachments that are available for just one specific business unit, you would create an additional row in the Context scroll area, deselect the All Values check box for the *Business Unit* key field, and enter the specific business unit for the context. You would then add the business unit-specific attachments to the Attachments grid.

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring Attachments.

Page Name	Definition Name	Navigation	Usage
Job Offer Attachment Setup	HRS_ATCH_SETUP	Setup HRMS, Product Related, Recruiting, Job Offer Attachment Setup, Job Offer Attachment Setup	Identify a custom application class to control which attachment framework attachments are visible to a recruiter who is adding attachments to a job offer.

Pages Used to Invoke Custom Attachment Processing

Invoking Custom Attachment Processing

Access the Job Offer Attachment Setup page (Setup HRMS, Product Related, Recruiting, Job Offer Attachment Setup).

Job Offer Attachment Setup		
Attachment Application Class		
Application Class Path:	HRS_APPLICANT_TRACKING:HRS_OFFER:UTIL	
Application Class ID:	AttachmentDD	
Method Name:	Get_Display_AttachmentLinks	

Job Offer Attachment Setup page

Application Class Path, Method Name, and Method Name	The method identified by these three fields here is called from the page activate of the Organizational Attachments page (HRS_OFF_SELATC_SEC) in the Job Offer component. It determines which job offer attachments are displayed on the Organizational Attachments page if a match is found for the context keys passed in.
	See <u>Chapter 19, "Making Job Offers," Attaching Organizational Level</u> <u>Documents, page 543.</u>
	To invoke custom processing, clone the delivered method, then modify the it according to your needs. Save the customized application class as a new application class within HRS_APPLICANT_TRACKING, then enter the

new method name on this page.

Setting Up the Data Transfer to HR

The Manage Hire Setup page enables you to select the information you want to transfer from the recruiting tables to the HR tables. To define the data to transfer, use the Data Transfer to HR (HRS_MNG_HIR_STP) and Hire Notification (HR_HIRE_NOTIF) components. When you hire an applicant, the system uses the information defined here to determine the data to transfer.

This section discusses how to define the recruiting data to transfer to HR.

See Also

Chapter 20, "Hiring Applicants," Hiring Applicants, page 564

Page Used to Set Up the Data Transfer to HR

Page Name	Definition Name	Navigation	Usage
Manage Hire Setup	HRS_MNG_HIR_STP	Set Up HRMS, Product Related, Recruiting, Data Transfer to HR, Manage Hire Setup	Define the recruiting data you want transferred to the HR database when the applicant is hired.

Defining Data to Transfer to HR

Access the Manage Hire Setup page (Set Up HRMS, Product Related, Recruiting, Data Transfer to HR, Manage Hire Setup).

Manage H	lire Setup	Manage Hire Setup				
This setup will determine what information is sent from the applicant's recruitment record to their employee record in Human Resources. Select the checkbox if the information should be sent to Human Resources.						
Type of Hire:	Hire	•				
Person P	rofile Other					
Person						
Description		Transfer To HR				
Person						
National ID						
Addresses						
Diversity						
Person Names	i					
Offer Letter						
Email Address	es					
Phones						

Manage Hire Setup page

Type of Hire

Select the type of hire you are performing. Your choices are:

- Add Concurrent Job
- Add Contingent Worker
- Hire
- Rehire
- Transfer

Transfer to HR (transfer to human resources)	Select the check box next to the information that you want transferred to the HR database for this type of hire.
	On the Person tab, available options include personal information such as name, national ID, addresses, email addresses, and phone numbers.
	There is also a check box to select if you want users to be able to send offer letters along with other applicant information. Specifically, selecting the Offer Letter check box causes the system to display a Send Offer Letter to HR check box on the Prepare for Hire page. Users must explicitly select that check box (which is deselected by default) to include the offer letter in the message to the HR system.
	Important! If you select the Offer Letter check box the system does <i>not</i> automatically send the letter. Instead, the system gives users the option of sending the offer letter when preparing specific applicants for hire.
	See Chapter 20, "Hiring Applicants," Preparing for Hire, page 570.
Ductile	

Profile

Select the Profile tab.

Person Profile Other			
Profile Types			
Description	Transfer To HR		
Areas of Study			
Competencies			
Degrees			
School Education			
E&G Special Projects			
Elements			
Geographic Preferences			
Honors and Awards			
International Preferences			
Licenses & Certifications			
Language Skills			
Current Location			
Location Preferences			
Memberships			
Responsibilities			

Manage Hire Setup page: Profile tab

The Profile tab lists profile content types that have been set up for applicants. The specific content types depend on your configuration, but examples might include competencies, licenses and certificates, and language skills.

Select the check boxes for the types of profile information that the system is to include when sending the applicant's data to the human resources system.

Other

Select the Other tab.

Person Profile Other	
Other	
Description	Transfer To HR
Eligibility/Identity	
Identification Data	
Prior Work Experience	
Accomodation	
Training	
Contract Data	
Appl/Person Assignment Chklist	
Applicant/Employment Contracts	
Bank Accounts	
Disabilities	

Manage Hire Setup page: Other tab

The Other tab lists additional types of applicant information that you can send to the human resources system, including eligibility/identity data, disability and accommodation data, checklists, employment contracts, and bank accounts.

Select the check boxes for the types of information that the system is to include when sending the applicant's data to the human resources system.

Chapter 9

Setting Up Recruiting Templates

This chapter provides an overview of recruiting templates and discusses how to:

- Set up resume templates.
- Set up job opening templates.
- Set up job opening posting templates.
- Set up screening templates.
- Set up interview evaluation templates.
- Set up recruitment templates.

Understanding Recruiting Templates

Recruiting Solutions uses various types of templates to control the layout and information on specific pages in PeopleSoft Talent Acquisition Manager and PeopleSoft Candidate Gateway.

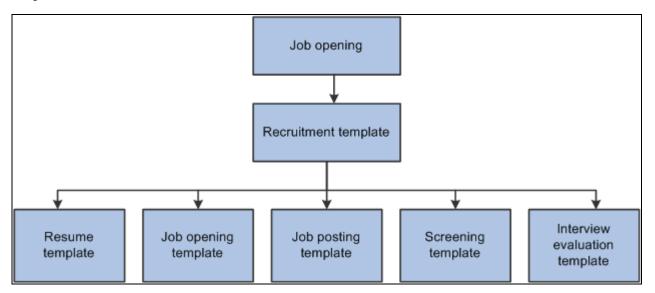
Template Types

There are five types of templates that control specific recruiting processes:

- *Resume templates* control the structure and content of the pages that applicants see when they use PeopleSoft Candidate Gateway to submit an online application.
- *Job opening templates* define the structure and content of the pages you use to create and view job openings.
- Job posting templates define the structure and content for job postings in a job opening.
- Screening templates provide default screening settings for a job opening.
- *Interview Evaluation templates* define the evaluation categories and rating scale that interviewers use when evaluating applicants.

Job openings are associated with these templates through a sixth type of template, the *recruitment template*. The recruitment template does not control a specific process. Rather, it references the other types of templates so that they, in turn, are associated with the job opening. (Recruitment templates also reference an employee referral program, which is not a template.)

The following diagram illustrates the association of templates with job openings. The job opening is associated with a recruitment template, which is in turn associated with the five types of process-specific templates.



Recruitment templates reference the other five types of templates so they can be associated with job openings.

Note. When applicants use Candidate Gateway to apply, but they do not specify a job opening, there is no recruitment template available. Therefore, you must also identify a default resume template for each site.

See Chapter 6, "Setting Up Candidate Gateway Sites," Setting Up Sites, page 91.

Recruitment Templates and Job Openings

When a recruiter creates a job opening, the system associated the job opening with a recruitment template based on a particular attributes of the job. You choose which attribute to use for this purpose by selecting a *template segmenting type* on the Recruiting Installation - General page.

Available segmenting types are:

- Business Unit.
- Company.
- Department.
- Job Code.
- Job Family.
- Job Profile.

This segmenting type provides limited profile integration. Although the system does not prevent you from using this option in addition to full profile integration, Oracle does not recommend this configuration.

See Chapter 13, "Creating Job Openings," Limited Profile Integration, page 241.

• Salary Grade.

For example, if the segmenting type is *Department*, then you can associate different recruitment templates with different departments in your organization. You also use the Recruiting Installation - General page to identify the default recruitment template for when a job opening has a department that is not explicitly associated with a recruiting template.

The Primary Job Opening Information page (where recruiters enter basic job opening information before continuing to the main job opening pages) always includes a required field that corresponds to the segmenting type. The value that the recruiter enters enables the system to apply the appropriate recruitment template before displaying the main Job Opening page.

Note. Although the system sets a job opening's recruitment template based on the segmenting data, users with administrator privileges can change the template manually on the Job Opening page. Changing the template clears certain data.

Template Modifications

Templates other than recruitment templates are not effective dated, so changes that you make to those template carry through to previously created job openings. For this reason, the best practice is not to modify templates once they have been used. Instead, create new templates.

Setting Up Resume Templates

To set up resume templates, use the Setup Resume Template (HRS_RES_TEMPLATE) component.

This section provides an overview of resume templates and discusses how to:

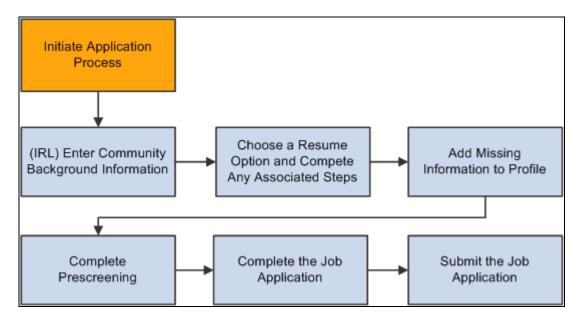
- Define basic information for resume templates.
- Define resume template pages and sections.
- (IRL) Define requirements for community background information.
- · Define prescreening settings for online applications without job openings
- Set point values for prescreening questions.

Understanding Resume Templates

Talent Acquisition Manager uses resume templates to define the structure for the online application process in Candidate Gateway.

The Online Application Process

The overall flow of the online application process is the same regardless of the settings in the resume template. This diagram describes that overall process flow:



Process flow for using Candidate Gateway to submit an application.

See *PeopleSoft Candidate Gateway 9.1 PeopleBook*, "Using Candidate Gateway," Understanding the Job Application Process.

The following table lists the ster	os and describes how the system uses	resume templates during each step:

Steps to Complete an Online Application	Resume Template Notes	
1. Initiate the application process.	The system selects one or more resume templates depending on whether the applicant applied for one job opening, many job openings, or applied without selecting a job opening. See <u>Chapter 9</u> , "Setting Up Recruiting Templates," Runtime Selection of a <u>Resume Template, page 135.</u>	
2. (IRL) Enter community background information.	This step occurs only if at least one of the selected resume templates is configured to require community background information for Ireland. See <u>Chapter 9</u> , "Setting Up Recruiting Templates," (IRL) Community Background Information, page 139.	
3. Choose a resume option and compete any associated steps.	This step occurs because all resume templates must have the Choose Resume page as the first page in their structure definition, and the page must include one or more of the four predefined resume options. Resume options are ways that the applicant can provide a resume—for example, by uploading a file or pasting resume text into a field.	
4. Add missing information to profile.	This step occurs because all resume templates must have the Contact Details page as the second page in their structure definition. This page always includes the same four sections for applicant names, phone numbers, addresses, and email addresses. If applicants have already provided the minimum required information (a first and last name), the system skips this step during the application process.	

Steps to Complete an Online Application	Resume Template Notes
 Complete prescreening. Note. An applicant who fails 	Resume templates don't list prescreening as a template page; the system automatically inserts this step at this point in the sequence of template pages.
prescreening does not continue to the next step.	If the applicant selected job openings before applying, this step occurs if any of the job openings include a screening level for prescreening.
	If the applicant applied without selecting a job opening, this step occurs only if the default resume template for the site includes prescreening settings.
	See <u>Chapter 9</u> , "Setting Up Recruiting Templates," Prescreening Settings, page 140.
6. Complete the job application.	During this step, the applicant sees the rest of the template pages from the resume template's structure definition. These are rendered as links on a Candidate Gateway page; clicking the links displays the sections that are associated with the template page. The resume template controls whether applicants can click any link at any time or whether they must go through the template pages in order.
	The Candidate Gateway page that displays the links to the template pages also includes links to the resume and profile information that were provided earlier as well as a button for submitting the application.
	See <u>Chapter 9, "Setting Up Recruiting Templates," Resume Template Pages,</u> page 136.
7. Submit the job application.	During this step, the system requires external applicants to accept your organization's employment terms before it accepts the submission. Acceptance is mandatory, and is not part of the resume template definition. (The text of the employment terms message comes from the text catalog.)
	During this step, the system also requests self-identification details from applicants who are applying for jobs in the USA, but applicants can ignore this request or explicitly decline to provide those details.

Runtime Selection of a Resume Template

When an applicant applies for a job opening online, the system uses the resume template from the recruitment template that is associated with the job opening.

If the job openings for which the applicant is applying are not associated with resume templates, or if the applicant is not applying for a specific job opening, the system uses the resume template that is associated with the site definition for the Candidate Gateway site.

If an applicant applies to multiple job openings that have different associated resume templates, the system merges the associated resume templates so that all possible sections are included in the new resume template and no sections are duplicated.

During the merge process, the system:

- 1. Determines all of the associated resume templates for all job openings to which an applicant applies for a given apply online session.
- 2. Determines the number of sections in each resume template.

- 3. Determines the resume template with the highest number of sections, and uses that resume template as the base template for the applicant's session.
- 4. Determines which sections from the remaining templates are not on pages in the base template.
- 5. Creates a new page called Additional Information and adds the sections that are not in the base template to the new page without duplicating any sections that were in the base template.

Resume Template Pages

In a resume template, a *page* is the high-level organizational element for applicant data. When you set up pages in a resume template, you specify both a page name and the sections that appear on each page.

The first two template pages in a resume template are always the same. The Resume Options page controls the choices that are presented to applicants when they are asked to provide a resume. The Contact Details page, which cannot be configured, controls the sections on the applicant's profile page.

The remaining template pages are rendered as links on the Complete Application page in Candidate Gateway. Clicking the links displays the sections that are associated with the template page.

The following illustration shows the Complete Application page. The top area of the page includes links to the relevant job openings, the applicant's resume, and the applicant's profile. The middle of the page has buttons for submitting and saving the application. The bottom part of the page is where you find the links that correspond to the resume template page definitions. In this example, the resume template has pages labelled *Preferences, Education and Work Experience,* and *Referral Information*.

Apply Now	
Complete Application	
Jobs you applied for	
Posting Title	
Sales Product Consultant - Delaware Area	
Add A	nother Job to Application
Fred Fredricks Resume 🖹	Jse a Different Resume
F	red Fredricks
Ed	<u>it Profile</u>
Previous Submit Save	Cancel <u>Careers Home</u> <u>Next</u>
Preferences Education and Work Experience	Referral Information
Use this section to tell us what you are looking for in term	s of location, working time and type of job.
Preferences	
Desired Start Date:	
Are you willing to relocate? No	•
Are you willing to travel? No	<u> </u>
Travel Percentage:	•
Regular/Temporary: Either	•
Desired Work Days	

The Complete Application page in Candidate Gateway includes links for the pages you configure in the resume template

Resume Template Sections

Each resume template page is associated with sections that correspond to specific types of information.

The sections that are available for the first two (hard-coded) pages in a resume template are different from the choice that are available for subsequent pages.

The Resume Options page (always the first page) must include at least one of these sections:

- Apply without using a resume
- Copy and paste resume text
- Upload a resume
- Use an existing resume

The Contact Details page (always the second page) is not configurable. It contains these section:

- Contact Name
- Contact Phone
- Contact Address
- Contact Email

Subsequent pages enable you to select from a broader list of sections. This list includes choices from two sources.

First, there are the profile content types that have been configured for use with Talent Acquisition Manager. Oracle delivers several such sections, including sections for competencies, language skills, degrees, and so forth. You can also configure additional content types; if you do, your custom content types are also available for selection.

Second, there are several non-profile sections that are built into the system. These are:

- Education History
- Federal Preferences
- Federal Priority Placement
- Online Questionnaire
- Personal Information
- Preferences
- References
- Referrals
- Training
- Work History

Within a recruitment template, the resume template needs to coordinate with the job opening template. Otherwise, there can be a mismatch between the information applicants enter when they apply for jobs online. For example, if a job opening template includes a section for screening questions, the resume template must also include the *Online Questionnaire* section so that applicants can answer the questions.

See Chapter 9, "Setting Up Recruiting Templates," Understanding Recruitment Templates, page 170.

Order of Resume Template Sections

At runtime, the job application pages display sections from the resume template in a predefined order, not in the order specified in the template. The only way to adjust the order is by putting sections on different pages and then putting the pages in the desired order.

This is the order in which sections appear on a page:

- 1. Preferences
- 2. Federal Preferences
- 3. Education History
- 4. Work History
- 5. Training
- 6. Federal Priority Placement
- 7. Sections for profile content types

All profile content type sections are grouped together. They appear in the order in which they are listed in the resume template.

- 8. Referenced
- 9. Personal Information
- 10. Online Questionnaire
- 11. Referrals

(IRL) Community Background Information

The Fair Employment Act 1989 requires companies in Northern Ireland with 11 or more employees to collect community background information from applicants. Applicants must enter community background information to submit applications online for job openings in Northern Ireland, because an employer in Northern Ireland cannot consider job applications that do not comply with the legislation.

If you select the Use Community Background option on the Country Specific page, an application that uses this template will include the Community Background Information page as the first page in the application process. Applicants must provide their community background information before they can continue to the next page in the application.

Note that the system does not consider the location of the job opening when determining whether to collect community background information. To prevent the system from collecting community background information for jobs openings outside of Northern Ireland, be sure that resume templates where the community background option is active are used only for job openings in Norther Ireland.

See *PeopleSoft Candidate Gateway 9.1 PeopleBook*, "Using Candidate Gateway," Understanding the Job Application Process.

When you hire an applicant, the system transfers community background information to employee data.

Recruiters can manually enter community background information for applicants in the Add New Applicant or Manage Applicant page in Talent Acquisition Manager. Community background information fields are under the Eligibility & Identity section, under the United Kingdom flag in the Personal Information group box.

See Chapter 15, "Entering Applicant Data," Adding Eligibility and Identity Information, page 385.

Prescreening Settings

The term *prescreening* refers to a screening process that automatically runs when the applicant begins the online application process. This differs from online screening, which runs after the applicant submits the online application for a job opening, and from the standard screening processes, which a recruiter runs from the Job Opening page.

See <u>Chapter 5</u>, "Setting Up Screening Processes," Understanding Prescreening and Online Screening, page 77

Setting up prescreening in a resume template serves two purposes:

- If an applicant applies without selecting a job opening, the system invokes the prescreening definition from the default resume template for the site
- The questions that you include in the resume template are automatically added to new job openings that use that template.

This is a handy data entry shortcut when you have a standard set of prescreening questions for broad categories of job openings.

Note. To actually use the questions during screening, you still need to set up the screening level criteria from within the job opening.

To set up prescreening for a resume template:

1. Configure general screening level settings such as the pass/fail criteria and the messages to present to applicants who pass or fail the prescreening process.

These settings are the same as the ones that you use to set up other screening levels on the Screening Definition page.

See Chapter 5, "Setting Up Screening Processes," Setting Up Screening Level Definitions, page 74.

2. Create the list of screening questions.

Prescreening questions must be multiple choice because the system cannot evaluate answers to openended questions.

Prerequisites

Before setting up resume templates, you must define the system's primary person type profile. The primary person profile type controls which profile content types are available for use in resume templates.

See Also

<u>Chapter 3, "Setting Up Profile Integration," Choosing the Primary Person Profile Type for Recruiting, page</u> <u>26</u>

Pages Used to Set Up Resume Templates

Page Name	Definition Name	Navigation	Usage
Template Definition	HRS_RES_TMPL1	Set Up HRMS, Product Related, Recruiting, Templates, Resume Template, Template Definition	Define basic information for resume templates.
Template Sections	HRS_RES_TMPL2	Set Up HRMS, Product Related, Recruiting, Templates, Resume Template, Template Sections	Define resume template pages and sections.
Country Specific	HRS_RES_TMPL3	Set Up HRMS, Product Related, Recruiting, Templates, Resume Template, Country Specific	(IRL) Define resume template pages and sections for community background information.
Pre Screening	HRS_RES_TMPL4	Set Up HRMS, Product Related, Recruiting, Templates, Resume Template, Pre Screening	Define prescreening settings, including processing rules and prescreening questions.
Answers to Screening Questions	HRS_RES_ANSWER_SEC	Click the View Answers link on the Pre Screening page.	Review the correct and incorrect answers to a prescreening question, and assign points to each answer.

Defining Basic Information for Resume Templates

Access the Template Definition page (Set Up HRMS, Product Related, Recruiting, Templates, Resume Template, Template Definition).

Template Definition <u>T</u> e	mplate Sections <u>C</u> o	untry Specific <u>P</u> re Screeni	ng
Template Definition			
Resume Template ID: *Description:	1000 Default	*Effective Status:	Active
*Short Description:	Default		
Status Date:	06/17/2004		

Template Definition page

Resume Template ID	Template IDs are automatically assigned when you create the template.
Effective Status and Status Date	Indicate whether the definition is <i>Active</i> or <i>Inactive</i> and the date that the status was assigned. Only active templates are available for selection in recruitment templates. The system displays a warning if you attempt to inactivate a template that is used in a recruitment template.
Description	Enter an identifying name for this template A descriptive name helps you when you reference the template from within a recruitment template or site definition.

Defining Resume Template Pages and Sections

Access the Template Sections page (Set Up HRMS, Product Related, Recruiting, Templates, Resume Template, Template Sections).

Template Definition	Template Sections	Country Specific Pre Screening	
Template Definition			
Resume Template ID:	1000		
Description:	Default		
Short Description:	Default	Enforce Linear Application	
Personal Information		Referrals	
Marital Status	Gender	Referral Source Required	
Date of Birth		Referral Subsource Required	
Template Pages		Find View All First 🚺 1	of 5 🕨 Last
Page Title	HRAM_CEPROF_PT22	2 Resume	+ -
*Page Sequence:	1		
Page Sections		Customize Find 🗖 🛗 First 🗹 1-4 of	4 🕨 Last
Resume Section Name	•		
Copy and paste result	me text		+ -
Upload a new resum	e		+ -
Use an existing resu	me		+ -
Apply without using a	resume		+ -

Template Sections page

Enforce Linear Application	Select this check box to have the system enforce the order in which an applicant completes pages when they apply for jobs online. For example, if there are four page links on the Complete Application page, only the first page link is active when the applicant first reaches that page. The user must click the Next link to access the second page.		
	If this check box is not selected, all page links on the Complete Application page are active and the applicant can access the pages in any order.		
	See <u>Chapter 9, "Setting Up Recruiting Templates," Template Pages, page</u> <u>144.</u>		

Personal Information

Use this group box to select the types of personal information that you want applicants to specify when they apply for jobs online. These fields are unavailable until you add the Personal Information section to a page in the template and save the template. Country or regional statutes or regulations determine the options that you select.

Marital Status, Date of Birth,	Select the check boxes for types of information that you want to ask
and Gender	applicants to provide.

Note. When these options are selected, the data is collected as part of the application form, not as part of the USA-specific self-identification details (gender and ethnicity) that are collected at the end of the application process for U.S. jobs. However, the field used to collect gender data is the same in both places, so if the field appears in both places during the application process, the value selected in either one automatically appears in the other one too.

Referrals

Referral Source Required	Select this check box to force applicants to specify a referral source when submitting an application using this template.
	If an applicant tries to submit an application without the required information, the system forces the applicant to either enter the missing information, save the application as a draft, or abandon the application.
	This setting applies only to applications that are submitted while the check box is selected: applications that are created when this check box is not selected will <i>not</i> require a referral source later on, even if the check box is selected after the application has been submitted.
Referral Subsource Required	d Select this check box to force applicants to specify a referral subsource when submitting an application using this template. This check box is available only when the Referral Source Required check box is selected.
	The system does not validate the existence of valid subsource data when you select this check box. However, even if this check box is selected, the system will allow an applicant to submit an application without a subsource if there are no subsources for the selected referral source.
	See <u>Chapter 11, "Setting Up Recruitment Sources," Setting Up Recruitment Sources, page 212.</u>

Template Pages

Use this group box to define the pages for the template, the sequence of the pages, and the sections on each page.

When you create a resume template, the system creates the first two pages for you and populates the page titles, page sequence numbers, and sections with default values. The first page always contains resume options. You can change the page title and sections for this page. The second page always contains contact details information. You can modify only the page title for this page.

Page Title	Select a text catalog entry to use as the page title. Only text IDs with HRAM (RS Applicant Manager) as the object owner identifier are availab for selection.	
	Page titles for all pages other than the first two appear as links on the Complete Application page. Applicants click the links to access the page and view its sections.	
	Note. The first two pages in the template are rendered as pages in the Careers component in Candidate Gateway, not as links on the Complete Application page. Therefore, the page titles that you select here does not affect what the applicant sees. To modify the actual page titles in Candidate Gateway, you need to modify the title text in the text catalog. The delivered the page titles are <i>Choose Resume</i> and <i>My Profile</i> , respectively.	
Page Sequence	Enter the sequence in which this page will appear. You cannot edit this field for pages one and two.	
Resume Section Name	Select the resume sections that you want to include on this page. PeopleSoft delivers several predefined sections in addition to the content types that you create for use in job openings and applications.	
	The system automatically populates pages one and two with default sections. You can edit the default sections for page one, but you cannot edit the default sections that appear for page two.	
	On any particular page of the resume template, the included sections appear in a predefined order, not in the order specified in the template.	
	See <u>Chapter 9, "Setting Up Recruiting Templates," Understanding Resume</u> <u>Templates, page 133.</u>	

(IRL) Defining Requirements for Community Background Information

Access the Country Specific page (Set Up HRMS, Product Related, Recruiting, Templates, Resume Template, Country Specific).

Template Definition Te	mplate Sections	Country Specific	Pre Screeni	ng
Template Definition				
Resume Template ID:	1000	Sta	atus Date:	06/17/2004
Description:	Default			
Community Background	- Northern Ireland			
Use Community Back	kground			

Country Specific page

Use Community Background Select this check box to add the Community Background Information page to the resume template. The Community Background Information page appears before any other pages in the resume template.

Note. U.S. requirements for attempting to collecting self-identification information (gender and ethnic group) are not configurable. Instead, the system is hard-coded to display the self-identification fields when the job opening's recruiting location is associated with a company location in the U.S. or, if the applicant applied without a job opening, if the applicant is in the U.S.

Defining Prescreening Settings for Applications Without Job Openings

Access the Pre Screening page (Set Up HRMS, Product Related, Recruiting, Templates, Resume Template, Pre Screening).

Template Definition Temp	late Sections	<u>C</u> ountry	Specific F	Pre Screening			
Template Definition							
Resume Template ID:	2005		Stat	us Date:	01/01/2000		
Description:	Pre Screeni	ng template					
Screening Definition							
Pass Message Text ID:	HRAM_CEC	ONLPASS_01		Pass Email F	lag		
Fail Message Text ID:	HRAM_CEC	DNLFAIL_01		Fail Email Fla	g		
Explain Text ID:	HRAM_CEC	DNLEMSG_01					
Status Definition							
Pass Status: Applied	•	Pass	Reason:		•		
Fail Status: Reject	Onl 💌	Fail R	eason:	Failed Onl	-		
Scoring Definition							
Percent Needed to Pass							
Percent Needed to Pass: 100 Use Raw Points							
Maximum Points to Assign:							
Points Assigned for Pass: Points Assigned for Fail:							
Screening Questions							
*Question	View Answers	Question Order	Use in Screening	Required	Points		
Overtime	<u>View</u> <u>Answers</u>	1	V			1	Î
Eligible to possess a fir 🔍	<u>View</u> Answers	2				1	Î
+ Add Screening Question	ons	Ma	aximum Tota	Points:	2		

Pre Screening page

Screening Definition Messages

Pass Message Text ID and Fail Message Text ID	Select the IDs for the messages that Candidate Gateway presents to applicants who pass and who fail this screening level.
	To create your own message, you can modify the delivered text catalog entries or create your own. If you create your own, you must use the following conventions to make the text catalog entries available for selection:
	• The object owner ID must be HRAM
	• The text ID for passing messages must be HRAM_%_PASS% (for example, HRAM_CUST1_PASS_PSCR01)
	• The text ID for fail messages must be HRAM_%_FAIL% (for example, HRAM_CUST1_FAIL_PSCR01)
Explain Text ID	Optionally, select a message for the system to display to an applicant before the prescreening questions appear. This message explains what the applicant is being asked to do.
	To create your own message, you can modify the delivered text catalog entries or create your own. If you create your own, you must use the following conventions to make the text catalog entries available for selection:
	• The object owner ID must be HRAM
	• The text ID for explain messages must be HRAM_%_EMSG% (for example, HRAM_CUST1_EMSG_PSCR01)
Pass Email Flag and Fail Email Flag	Select these check boxes to make the system send the pass and fail messages to applicants by email (in addition to showing the message in Candidate Gateway). Only applicants with an email address receive the email.
Status Definition	
Pass Status and Pass Reason	Select the default disposition (and, optionally, an associated reason) for the system to assign applicants who pass this screening level. Typically, you assign the <i>Screen</i> . disposition.
Fail Status and Fail Reason	Select the default disposition (and, optionally, an associated reason) for the system to assign applicants who fail this screening level. Typically, you assign the <i>Reject</i> disposition.

Scoring Definition and Percent Needed to Pass

Use this group box defines the rules for determining whether the applicant passes or fails prescreening.

Percent Needed to Pass	Enter the minimum percentage amount of the total possible points that an applicant must have to pass the screening level. If the applicant must correctly answer all prescreening questions, enter 100%.	
Use Raw Points, Maximum Points to Assign, Points	These fields are the same as those on the Screening Definition page See <u>Chapter 5, "Setting Up Screening Processes," Setting Up Screening</u>	
Assigned for Pass. and Points Assigned for Fail	Level Definitions, page 80.	
	Use these fields to assign a candidate points on successful completion of a screening level. This point assignment is relevant when the score helps you evaluate the applicant, or if the points that an applicant accumulates over multiple screening levels are considered together (for example, during the U.S. Federal screening process). However, prescreening points are not typically used after the immediate determination of whether the applicant has passed or failed. In this situation, you can leave all of these fields blank.	
Screening Questions		
Question	Select multiple-choice questions to include in the prescreening questionnaire. Prescreening questions must be multiple choice because the system cannot evaluate answers to open-ended questions.	
View Answers	Click to access the Answers to Screening Questions page, where you can review the possible answers to the question, see which answers are correct, and update the point values for the answers.	
Order Number	Enter numbers for each question to establish the order in which they appear in the questionnaire. Because this field accepts only integers, consider using non-consecutive numbers to make it easier to insert additional questions in between existing questions.	
	Note. If the Randomize Screening Questions field on the Recruiting Installation - Jobs page has a <i>Yes</i> value, then the system disregards the question order and presents questions to applicants in random order.	
Use in Screening	Select to include the question in the prescreening questionnaire. Because this page lists only the questions that you use for prescreening, you normally select this check box for all of the questions in the grid.	
Required	Select to indicate that a correct answer to the question is required in order for the applicant to pass the screening process.	
	An applicant who does not provide the correct answer for a required question fails the screening level regardless of whether the applicant has an otherwise passing score.	

Points	Displays the point value of the correct answer or, if the question has more than one correct answer, the sum of the point values for all correct answers.
	To ensure correct processing, make sure that each question has a point value. Use the View Answers link if you need to assign or update point values.
Maximum Total Points	Displays the sum of the point values for all questions in the Screening Questions grid.
Add Screening Questions	Click this link to add another row to the Screening Questions grid.

Setting Point Values for Prescreening Questions

Access the Answers to Screening Questions page (click the View Answers link on the Pre Screening page).

A	Answers to Screening Questions			
	Question ID: Are you willing to work overtime periodically ?			
	Answers			
	Answer Description	Correct Answer	Points	
	No			
	Yes		1	
	OK Cancel			

Answers to Screening Questions page

Points

Review and optionally override the point value for each possible answer to the question. Default point values come from the question definition. You can assign points for both correct and incorrect answers.

Setting Up Job Opening Templates

To set up job opening templates, use the Job Opening Template (HRS_JO_TMPL) component.

This section provides an overview of job opening templates, lists a prerequisite, and discusses how to:

- Enter identifying information for job opening templates.
- Define job opening template structure.

Understanding Job Opening Templates

Job opening templates control the content and organization of sections on the Job Opening page. The template organizes job opening data into *pages* and *sections*. The template definition includes names that you choose for the pages; the sections, however, have fixed names that you cannot change.

Job Opening Template Pages

In a job opening template, a page is the high-level organizational element for job opening data.

At runtime, the system renders template pages differently depending on whether the user is adding a new job opening or accessing an existing job opening:

- If a user is creating a new job opening, the template pages appear as tabs on the Job Opening page.
- If a user accesses an existing job opening, template pages are rendered as section links under the Job Opening Details tab.

After a job opening is created, the Job Opening page has additional tabs for managing applicants and tracking recruiting activities. Therefore, the actual job opening data is consolidated under a Job Opening Details tab, and the template pages are pushed down one level in the display hierarchy.

In the following examples, the job opening template defines five pages: Job Details, Qualifications, Screening, Job Postings, and Hiring Team. The first picture shows the Job Opening page during the job opening creation process. The second picture shows the Job Opening page after the job opening is created.

Create New Job Opening			
Job Opening			
Posting Title: Job Opening Status: Job Title: Position Number: Business Unit: Job Family:	Administrative Assistant 005 Draft Assistant-Administrative 19000018 Administrative Assistant GBIBU Global Business Institute BU KADMIN Administrative Support	Job Code:	170005
Save and Open Save as Draft Cancel Previous Step Next Step			
Job Details Qualific	cations Screening Job Postings	Hiring Team	

When users create new job openings, the pages from the template definition appear as tabs on the Job Opening page

Job Opening			
			ning
Posting Title:	Administrative Assistant	Job Opening ID:	30004
Job Opening Status:	010 Open	Job Type:	Standard
Job Title:	Assistant-Administrative	Job Code:	170005
Position Number:	19000018 Administrative Assistant		
Business Unit:	GBIBU Global Business Institute BL	J	
Job Family:			
Save Se Clone	Create New Previous Job Openin	g INext Job Opening	g I <u>Job Opening List</u>
Manage Applicants	Find Applicants Activity & Attachme	nts Job Opening	Details
Job Details Qu	<u>alifications Screening Jo</u>	<u>b Postings Hi</u> i	ring Team

When users manage existing job openings, the pages from the template definition appear as sections under the Job Opening Details tab on the Job Opening page.

Job Opening Template Sections

The first section in the first page of every template is the delivered *Job Information* section. This contains basic information about the opening (the job opening type, the date opened and the target fill date, the number of openings to be filled, and so forth) and the actual job (job code, business unit, company, department, location, and so forth)

See Chapter 13, "Creating Job Openings," Entering Basic Job Information, page 254.

The rest of the template is user-configured. You can add all sections to the first template page (after the Job Information section), or you can create additional template pages, organized according to your needs. For each template page in the template definition, you list one or more sections that appear on that page.

The choices that appear in the section drop-down list box come from two sources.

• Profile content types.

There are sections for those profile content types that are available for use in Talent Acquisition Manager. These are the content types are that are included in the system's primary person profile type (as defined on the Assign Profile Type Defaults page).

For example, the primary person profile includes content types for competencies, languages, and licenses & certifications, those all appear as section choices.

• Predefined recruiting sections.

Talent Acquisition Manager includes several predefined recruiting-specific sections. Some of these predefined sections are job-related, others relate to screening, and still others are used to identify members of the hiring team.

The following table lists the predefined sections:

Section Name	Section Contents	Reference
Education and Experience.	A matrix showing how much experience is required for candidates with differing levels of education.	See <u>Chapter 13, "Creating Job</u> <u>Openings," Adding Job</u> <u>Qualifications, page 273.</u>
Job Information. Note. This is required to be the first section on the first page in the template.	Basic information about the job opening.	See <u>Chapter 13, "Creating Job</u> <u>Openings," Opening Information,</u> <u>page 257.</u>
Job Postings.	A list of existing job postings and links for creating or modifying job postings.	See <u>Chapter 13, "Creating Job</u> <u>Openings," Creating Job Postings,</u> <u>page 307.</u>
Profile Details. Note. This option is available only if profile integrations is activated on the Recruiting Installation - General page.	A list of profiles that are associated with the job opening.	See <u>Chapter 13, "Creating Job</u> <u>Openings," Reviewing Profile Usage,</u> <u>page 274.</u>
Salary Information.	Salary information such as the salary plan, salary grade and step ranges, salary range, pay frequency, and currency.	See <u>Chapter 13, "Creating Job</u> <u>Openings," Salary Information, page</u> <u>272.</u>
Screening Options.	A list of screening levels, and fields for defining certain screening processing rules.	See <u>Chapter 13, "Creating Job</u> <u>Openings," Defining Job Opening</u> <u>Screening Levels, page 293.</u>
Screening Questions.	A list of screening questions.	See <u>Chapter 13, "Creating Job</u> <u>Openings," Adding Screening</u> <u>Questions to a Job Opening, page 279.</u>
Staffing Information.	Job information such as the full- time/part-time, regular/temporary, begin and end dates, work period and the hours worked per work period, and travel percentage.	See <u>Chapter 13, "Creating Job</u> <u>Openings," Staffing Information,</u> <u>page 270.</u>
Works Council Information.	A Works Council ID field for identifying the works council for the job opening. The Works Council section is only available for selection if you select the Optional Works Council option on the Recruiting Installation - General page.	See <u>Chapter 13</u> , "Creating Job <u>Openings," Works Council</u> <u>Information, page 263.</u>

Section Name	Section Contents	Reference
Recruiter Assignments. Hiring Manager Assignments. Interviewer Assignments.	A list of assignees or team members.	See <u>Chapter 13, "Creating Job</u> <u>Openings," Identifying Recruiting</u> <u>Team Members for a Job Opening,</u> <u>page 314.</u>
Interested Party Assignments. Screening Notification Team.		

Within a recruitment template, the resume template needs to coordinate with the job opening template. Otherwise, there can be a mismatch between the information applicants enter when they apply for jobs online. For example, if a job opening template includes a section for screening questions, the resume template must also include the *Online Questionnaire* section so that applicants can answer the questions.

See Chapter 9, "Setting Up Recruiting Templates," Understanding Recruitment Templates, page 170.

Order of Job Opening Template Sections

At runtime, the Job Opening page displays sections from the job opening template in a predefined order, not in the order specified in the template. The only way to adjust the order is by putting sections on different pages and then putting the pages in the desired order.

This is the order in which sections appear on a page:

- 1. Job Information
- 2. Works Council Information
- 3. Profile Details
- 4. A scroll area, Additional Job Specifications, containing these sections:
 - a. Staffing Information
 - b. Salary Information
 - c. Education and Experience
 - d. All profile content types.

Content types are alphabetized according to their identifier (which is not visible on the Job Opening page) rather than by their description. For example, the delivered *Current Location* content type has the identifier *LOCATION*, so it is alphabetized under *L* rather than under *C*.

- e. Screening Questions
- f. Screening Options

- 5. A group box, Assignments, containing these sections:
 - a. Recruiter Assignments
 - b. *Hiring Manager Assignments*
 - c. Interviewer Assignments
 - d. Interested Party Assignments
 - e. The Screening Notification Team section.
- 6. Job Postings

Note. The *Additional Job Specifications* scroll area can have multiple rows if the system is configured to permit more than one job code or position per job opening. The sections in this scroll area can therefore vary for the different job codes in the job opening. When the system does not permit more than one job code per job opening, the scroll area is still visible, but it never has more than a single row of data.

See Chapter 2, "Defining Installation Options for Recruiting," Defining Job-Related Settings, page 15.

Prerequisites

For the Works Council Information section to appear as an option in the job opening template, you must select the Optional Works Council option on the Recruiting Installation - General page.

See <u>Chapter 2</u>, "Defining Installation Options for Recruiting," Defining General Settings for Templates, <u>Approvals</u>, and <u>Integrations</u>, page 11.

Pages Used to Set Up Job Opening Templates

Page Name	Definition Name	Navigation	Usage
Job Opening Template	HRS_JO_TMPL_DESCR	Set Up HRMS, Product Related, Recruiting, Templates, Job Opening Template, Job Opening Template	Identify job opening templates.
Template Structure page	HRS_JO_TMPL_STRUCT	Set Up HRMS, Product Related, Recruiting, Templates, Job Opening Template, Template Structure	Define job opening template structure.

Entering Identifying Information for Job Opening Templates

Access the Job Opening Template page (Set Up HRMS, Product Related, Recruiting, Templates, Job Opening Template).

Job Opening Template <u>T</u> en	nplate Structure	
Job Opening Template		
Job Opening Template ID:	1000	
*Status:	Active	
Status Date:	01/01/1980	
*Description:	Requisition Default	
*Short Description:	Req Dflt	

Job Opening Template page

Job Opening Template ID	Template IDs are automatically assigned when you create the template.
Status and Status Date	Indicate whether the definition is <i>Active</i> or <i>Inactive</i> and the date that the status was assigned. Only active templates are available for selection in recruitment templates. The system displays a warning if you attempt to inactivate a template that is used in a recruitment template.
Description	Enter an identifying name for this template A descriptive name helps you when you reference the template from within a recruitment template.

Defining Job Opening Template Structure

Access the Template Structure page (Set Up HRMS, Product Related, Recruiting, Templates, Job Opening Template, Template Structure).

Job Opening Template	Template Structure	
leb Opening Temple	to	
Job Opening Templa	le	
Description:	Requisition Default	
Status:	Active	
Status Date:	01/01/1980	
Default Question Set:		
Job Opening Templ	ate	
*Description:	Job Details	Î
*Page Number:	1	
Job Opening Page	e Content	
*Section		
Job Information		Û
Staffing Information	n 💌	Î
Salary Information		Û
+ Add Sections		
*Description:	Qualifications	Î
	2	
*Page Number:		
Job Opening Page	e content	
*Section		
Education and Exp	erience 💌	Î
Screening Questio	n 💌	Î
Areas of Study	•	Î
Competencies	•	Î

Template Structure page

Note. This illustration shows only part of the page.

Default Question Set	Optionally, enter a question set whose questions will be automatically loaded into job openings that you create using this template. Users can still add and remove questions from the job opening, this option simply streamlines data entry when you use a standard set of questions for all job openings based on the template.
	Changes made to the question set, or the association of a different question set ID with the template, will not impact job openings that have already been created. Any changes to the template or the question set will apply to new job openings only.
	Note. When a job opening is cloned, the new job opening does not load questions from this default question set. Instead, the system copies the questions from the original job opening.
Job Opening Template	

Description	Enter a title for the template page. This title appears on the corresponding tab (when creating a job opening) or tab section (when accessing an existing job opening).
Page Number	Enter a sequence number for the template page. This controls the order in which the tabs or tab sections appear on the Job Opening page.
Add Pages	This link appears at the bottom of the Job Opening Template page, after all existing page definitions. Click to add another template page at the bottom of the Template Structure page. (There is no scroll area for the template pages; they appear in one long list.)

Job Opening Page Content

Use this grid to list the sections to be included in the template page.

Section	Select the section or sections that you want included on this page. Values in the drop-down list box include both predefined recruiting sections and profile content types that have been configured for recruiting use.	
	Note. The Job Information section is always the first section on the first template page, where it appears in a read-only grid row	
Add Sections	Click to add another section to the template page. A blank row appears in the Job Opening Page Content grid.	
	On any particular page of the resume template, the included sections appear in a predefined order, not in the order specified in the template.	
	See <u>Chapter 9, "Setting Up Recruiting Templates," Understanding Job</u> Opening Templates, page 151.	

Setting Up Job Opening Posting Templates

To set up job opening posting templates, use the Job Opening Posting (HRS_JO_PST_TMPL) component.

This section provides an overview of job opening posting templates, lists prerequisites, and discusses how to create a job opening posting template.

Understanding Job Opening Posting Templates

Job opening posting templates control which sections, or *posting description types* are available to include in a job posting.

Posting description types are categories of information that you can assemble when constructing a job posting. For example, your organization might have posting description types such as Qualifications, Responsibilities, and How to Apply.

When you define a job opening posting template, you select from the posting description types that you set up on the Posting Description Type page.

See Also

Chapter 8, "Setting Up Additional Recruiting Definitions," Defining Posting Description Types, page 108

Prerequisites

Before you can set up a job posting template, define posting description types.

See <u>Chapter 8, "Setting Up Additional Recruiting Definitions," Setting Up the Job Posting Description</u> <u>Library, page 107.</u>

Page Used to Set Up Job Opening Posting Templates

Page Name	Definition Name	Navigation	Usage
Posting Template	HRS_JO_PST_TMPL	Set Up HRMS, Product Related, Recruiting, Templates, Job Opening Posting Template, Posting Template	Create a job opening posting template.

Creating a Job Opening Posting Template

Access the Posting Template page (Set Up HRMS, Product Related, Recruiting, Templates, Job Opening Posting Template).

Posting Template			
Template Details			
Job Opening Pos Status: Status Date:	sting ID:	1000 Active 01/01/1980	
*Description:		Posting Default	
Short Description Requisition Pag		Posting	
Selected	Description		Seq Nbr
	Basis of Rati	ing	
	Closing State	ement	
	Conditions of Employment		
	Department Marketing Statement 1		1
	Equal Employment Opportunity		
	How CTAP &/or ICTAP May Apply		
	How To Apply 5		5
	How to Claim Vet Preference		
	Org Marketing Statement 4		4
	Other Information		
	Pay, Benefits & Work Schedule		
	Qualifications 2		2
	Responsibilities 3		3
	Who May Apply		

Posting Template page

Template Details

Job Opening Posting ID	Template IDs are automatically assigned when you create the template.
Status and Status Date	Indicate whether the definition is <i>Active</i> or <i>Inactive</i> and the date that the status was assigned. Only active templates are available for selection in recruitment templates. The system displays a warning if you attempt to inactivate a template that is used in a recruitment template.
Description	Enter an identifying name for this template A descriptive name helps you when you reference the template from within a recruitment template.

Requisition Pages to Include

This grid lists all active posting description types.

Selected	Select this check box for each posting description type that you want to include in the job posting.
Seq Nbr (sequence number)	Enter the order in which you want the posting description type to appear in the job posting.

Setting Up Screening Templates

To set up screening templates, use the Screening Template (HRS_SCREEN_TMPL) component.

This section provides an overview of screening templates, list a prerequisite, and discusses how to set up a screening template.

Understanding Screening Templates

Use screening templates to define default screening options that the system applies to job openings that are associated with the template. The default settings include a list of screening levels, the order in which the screening levels are processed, and whether applicants must pass the previous level in order to be processed by the next screening level.

For U.S. Federal agencies, there are also default settings related to score augmentation, veterans preferences, tie breakers, and candidate ranking. The template does not, however, include transmutation settings, which are configured in individual job openings.

Note. Screening templates do *not* include specific screening criteria. The criteria is job-specific and therefore must be configured in the Job Opening component.

Prerequisite

Before you begin to set up screening templates, define the screening levels that you want to include in the template.

See Chapter 5, "Setting Up Screening Processes," Setting Up Screening Level Definitions, page 74.

Page Used To Set Up Screening Templates

Page Name	Definition Name	Navigation	Usage
Screening Template	HRS_SCREEN_TMPL	Set Up HRMS, Product Related, Recruiting, Templates, Screening Template, Screening Template	Create a screening template.

Setting Up a Screening Template

Access the Screening Template page (Set Up HRMS, Product Related, Recruiting, Templates, Screening Template).

Screening Template	
Screening Definition	
*Status: Active Screening Template ID: 1001	
*Description: Federal Salaried Transmutation	
Short Description: Fed Sal	
Max Total Points: 0	
Must Pass Previous Levels	
Federal	
Raw Augmented Score Limit: 0 Raw Veterans Pref Score Limit: 0 Tie Break Number: 0]
Rank Candidates of Category 1 Rank Candidates of Category 2	
Rank Candidates of Category 3 Rank Candidates of Category 4	
Veteran Preferred in Tie Break	
Non-competitive	
Rank Candidates of Category 1 Rank Candidates of Category 2	
Rank Candidates of Category 3	
Veteran Preferred in Tie Break	
Screening Levels Customize Find 🖾 🛗 First 🚺 1-3 of 3 🗅 Las	st
*Sequence number Screening ID Description	
1 Basic Eligibility 🔽	-
2 Minimum Qualifications	-
3 Quality Ranking 🛨 🛨	-

Screening Template page (standard)

Note. The settings on this page are default settings that the system uses for job openings that are associated with this template. Everything that you configure here can be changed in the Job Opening component.

Screening Definition

Screening Template ID	Template IDs are automatically assigned when you create the template.
Status	Indicate whether the definition is <i>Active</i> or <i>Inactive</i> . Only active templates are available for selection in recruitment templates. The system displays a warning if you attempt to inactivate a template that is used in a recruitment template.

Description	Enter an identifying name for this template A descriptive name helps you when you reference the template from within a recruitment template.	
Max Total Points (maximum total points)	Enter the maximum points that an applicant can accumulate across all screening levels. During the applicant ranking process in U.S. federal implementations, the Rank Applicants page shows applicants' final scores both as numbers and as a percentage of the value you enter here, which is typically <i>100</i> .	
Must Pass Previous Levels	Select this check box if the applicant must pass the previous screening level before being evaluated for the next screening level.	
	This setting does not apply to:	
	• The first screening level, as indicated by the lowest sequence number.	
	• Prescreening or online screening levels.	
	Prescreening is always the first screening level anyway. Online screening can be preceded by prescreening (although the best practice is to use only one or the other in a job opening), but because failing prescreening stops the online application process, applicants cannot even reach the online screening level without passing any preliminary prescreening.	

(USF) Federal

Raw Augmented Score Limit	Enter the total number of augmentation points that can be awarded. You can configure screening to award augmentation points for certain competencies or accomplishments that are not required for the position but may be given consideration in the selection process.
Raw Veterans Pref Score Limit (raw veterans preference score limit)	Enter the maximum number of points that can be added to an applicant's final screening score for veterans preference. The number that you enter overrides veterans preference score higher than the limit.
Tie Break Number	Enter a random number to use in the tie-breaking algorithm for ranking applicants.

(USF) Competitive and Non-Competitive

The same fields appear in the Competitive and Non-Competitive group boxes so that you can separately configure ranking options for competitive and noncompetitive applicants.

Rank Candidates of Category 1, Rank Candidates of Category 2, Rank Candidates of Category 3, and Rank Candidates of Category 4	At the end of the applicant screening process, score thresholds are applied to classify the candidates as qualified, well-qualified, or best-qualified. The system then considers these qualification classifications along with the applicants's priority processing status and places applicants in these four categories:
	• Category 1: Qualified, well qualified, and best qualified applicants with <i>Must Select</i> priority placement.
	• Category 2: Well qualified and best qualified applicants with <i>Must Consider</i> priority placement.
	• Category 3: Best qualified applicants with no priority placement.
	• Category 4: Qualified and well qualified applicants with no priority placement.
	Select check boxes for each category of applicants that are to be included in the final applicant ranking that produces the Certificate of Eligibles.
	See <u>Chapter 5, "Setting Up Screening Processes," Understanding Priority</u> <u>Placement Processing, page 83.</u>
Veteran Preferred in Tie Break	Select this check box if you want applicants with veteran status to win tiebreakers during the ranking process.

Screening Levels

Use this grid to add screening levels to the template.

Sequence number	Assign each screening level an order number. This, in turn, becomes the default order of the screening levels in the job opening.
	Screening levels for prescreening and online screening always appear first (prescreening before online screening if both exist). You cannot change the order for these screening levels.
Screening ID	Select the screening level definitions that you want to include in the template

Setting Up Interview Evaluation Templates

To set up interview evaluation templates, use the Interview Evaluation Templates (HRS_INT_EVL_DFN) component.

This section provides an overview of interview evaluation templates, lists prerequisites, and discusses how to create an interview evaluation template.

Understanding Interview Evaluation Templates

Interview evaluation templates define three aspects of the form that interviewers use to enter interview evaluations:

• Evaluation categories.

These are the different aspects of an applicant that the interviewer evaluates. For example, the interviewer might evaluate the applicant's communication skills, technical skills, and work experience.

On the interview template, you review all available categories and select which ones to include in the evaluation form.

• Ratings.

Interviewers evaluate applicants using a rating scale that you configure especially for this purpose.

On the interview template, you review all available ratings and select which ones to make available in the evaluation form.

• Recommendations.

Interviewers make recommendations using statuses for the interview recruitment areas. On the interview template, you review these statuses and select which ones to make available as recommendation options. For each status, you also choose which associated reasons to make available.

See Also

Chapter 18, "Interviewing Applicants," Completing Interview Evaluations, page 507

Prerequisites

Before you to set up interview evaluation templates, you must set up:

- 1. Interview evaluation categories.
- 2. Interview evaluation ratings.

See Chapter 8, "Setting Up Additional Recruiting Definitions," Setting Up Interview Definitions, page 114.

Pages Used to Set Up Interview Evaluation Templates

Page Name	Definition Name	Navigation	Usage
Interview Evaluation Template	HRS_INT_EVL_DFN	Set Up HRMS, Product Related, Recruiting, Templates, Interview Evaluation Template, Interview Evaluation Template	Create an interview evaluation template.

Page Name	Definition Name	Navigation	Usage
Recommendation Reasons	HRS_INTEVL_RSN_SEC	Click the Reasons link on the Interview Evaluation Template page.	Select reasons (for a specific interview status) to make available to interviewers when they complete an interview evaluation.

Creating an Interview Evaluation Template

Access the Interview Evaluation Template page (Set Up HRMS, Product Related, Recruiting, Templates, Interview Evaluation Template, Interview Evaluation Template).

Interview	Evaluation	Template			
Template ID: *Description: *Status:	1000 Default Interview Active		Short Description Status Date:	08/10/2	004
Evaluation Ca			Customize View All	First C 1-4 of	4 D Last
Evaluation Cate				_	+ -
Education/Tra				-	+ =
Work Experier	ice			•	+ -
Technical Skil	ls			•	+ -
Create New C	Category				

Interview Evaluation Template page (1 of 2)

Rec	ommendation		<u>Customize</u>	View All	First 🚺 1-5 of 5 Ď Last
Use	Status Code	Description			Reason Required
•	005	005 Interview		Reasons	
	020	020 Make Offer		Reasons	
	100	100 Hold		Reasons	
	110	110 Reject		Reasons	V
	120	120 Withdrawn		Reasons	
Rati	ing Scale		<u>Customize</u>	View All	First 🚺 1-3 of 3 🖸 Last
Use	Rating			Score	
☑	Excellent			2	
	Average	Average		1	
•	Not Qualified			0	
Cr	Create New Rating				

Interview Evaluation Template page (2 of 2)

Template ID	Template IDs are automatically assigned when you create the template.
Description	Enter an identifying name for this template A descriptive name helps you when you reference the template from within a recruitment template.
Status	Indicate whether the definition is Active or Inactive.
	Only active templates are available for selection in recruitment templates. The system displays a warning if you attempt to inactivate a template that is used in a recruitment template.
Evaluation Categories	
Evaluation Category	Select an evaluation category that you want included in the interview evaluation. Evaluation categories are created on the Interview Evaluation Category page.
Create New Category	Click to access the Interview Evaluation Category page in Add New mode so that you can add additional categories to the system.

Recommendation	
Use and Status Code	Select the Use check box for a status code to make that status available as a recommendation on the interview evaluation form.
	Status codes are defined on the Status Effects page. The system automatically lists the status values that are defined for the interview recruitment area.
Reasons	Click to access the Recommendation Reasons page, where you can choose which status reasons to make available on the evaluation form that interviewers use. The page lists all reasons (if any) that exist for the associated interview status.
Reasons Required	Select this check box if you require interviewers to select an interview reason when they select the interview status value on the evaluation form. If you select this check box, confirm that there are, in fact, reasons associated with the indicated status.
	Interview reasons are defined on the Statuses and Reasons page.
Rating Scale	
Use and Rating	Select the Use check box for a rating to make that rating available as on the interview evaluation form.
	Ratings are defined on the Interview Evaluation Rating page. The system automatically lists all existing ratings.
Score	Displays the number of points that are associated with the rating.
Create New Rating	Click to access the Interview Evaluation Ratings page in Add New mode so that you can add additional ratings to the system.
See Also	

Chapter 4, "Setting Up Recruiting Statuses," Setting Up Recruiting Statuses, page 49

Chapter 18, "Interviewing Applicants," Completing Interview Evaluations, page 507

Selecting Available Status Reasons

Access the Recommendation Reasons page (click the Reasons link on the Interview Evaluation Template page).

Reco	Recommendation Reasons				
	Code: 110	Reject			
Reas	sons				
Use	Status Reason	Description			
	010	Insufficient Experience			
	☑ 020 Insufficient Skills				
0	OK Cancel				

Recommendation Reasons page

Use and Status Reason

Select the Use check box for a status reason to make that reason available as a recommendation on the interview evaluation form.

Setting Up Recruitment Templates

To set up recruitment templates, use the Recruitment Template (HRS_RCRT_TMPL) component.

This section provides an overview of recruitment templates, lists prerequisites, and discusses how to:

- Link templates to recruitment templates.
- Assign segmentation values to recruitment templates.

Understanding Recruitment Templates

Recruitment templates link all the recruiting templates together. Newly created job openings are automatically linked to a recruitment template, and all templates that are assigned to that recruitment template are then used by that job opening.

Specific sections on the job opening template need to be coordinated with the sections on the resume template. When you save the recruitment template, the system checks for these sections in the job opening template and verifies that the corresponding sections are included in the resume template.

When a mismatch occurs between the two templates, a warning message appears. You can cancel to correct the problem, or you can save the recruitment template with the mismatched information.

Cross-Template Validations

The following table identifies the sections that need to be coordinated to avoid a validation error:

Section in Job Opening Template	Corresponding Sections in Resume Template
Education and Experience	• Education History,
	Work History
	• Training
	Note. All three of these section should be in the resume template if the Education and Experience section is in the job opening template.
Screening Question	Online Questionnaire
<profile content="" types=""></profile>	All profile-based sections must match up. The section names are the same in the resume template as they are in the job opening template.
	The delivered profile configuration includes these 18 profile-based sections: Areas of Study, Competencies, Current Location, Degrees, E&G Special Projects, Elements, Geographic Preferences, Honors and Awards, International Preferences, Language Skills, Licenses & Certifications, Location Preferences, Memberships, Responsibilities, School Education, Special Projects, Tests/Examinations, and Travel Preferences.

Job Opening Template Sections That Aren't Validated Against the Resume Template

The following sections in the job opening template are *not* validated against the resume template:

• Job Information, Salary Information, and Staffing Information.

Some of the fields in these job opening sections have equivalents in the resume template's *Preferences* section, but the system does not perform any validations related to these sections.

• Profile Details.

This section shows which person and job profiles provided data for the qualifications sections in the job opening, so it is not related to any data that you would collect from applicants.

• Screening Options.

This section is for setting up the screening rules for the job opening, so it is not related to any data that you would collect from applicants.

• Job Postings.

This section is for creating and posting job descriptions, so it is not related to any data that you would collect from applicants.

• The assignment-related sections: *Hiring Manager Assignments, Interested Party Assignments, Interviewer Assignments, Recruiter Assignments, and Screening Notification Team*

This section is for identifying employees who are on the hiring team for the job opening, so it is not related to any data that you would collect from applicants.

• Works Council Information.

This section is for associating a works council with the job opening, so it is not related to any data that you would collect from applicants.

Resume Template Sections That Aren't Validated Against the Job Opening Template

The following sections in the resume template are not validated against the job opening template:

• Preferences and Federal Preferences, and Federal Priority Placement.

Some of the fields in these resume sections have equivalents in the *Job Information* section of the job opening template. The *Job Opening* section is required in all job opening templates, so no validation is necessary.

• Personal Information, References, and Referrals.

These sections contain general applicant data that is not related to any job openings data.

Prerequisites

Before you define recruitment templates:

- (Optional) Set up resume templates.
- (Optional) Set up job opening templates.
- (Optional) Set up job posting templates.
- (Optional) Set up screening templates.
- (Optional) Set up interview evaluation templates.
- (Optional) Set up employee referral programs.

See Chapter 24, "Managing Employee Referral Programs," page 699.

Pages Used to Set Up Recruitment Templates

Page Name	Definition Name	Navigation	Usage
Recruitment Template	HRS_RCRT_TMPL	Set Up HRMS, Product Related, Recruiting, Templates, Recruitment Template, Recruitment Template	Link templates to recruitment templates.
Segmentation Values	HRS_SEGMENT_SEC	Click the Segmenting Values link on the Recruitment Template page.	Assign segmentation values to recruitment templates.

Linking Templates to Recruitment Templates

Access the Recruitment Template page (Set Up HRMS, Product Related, Recruiting, Templates, Recruitment Template).

Recruitment Template	
Recruitment Template ID:	1000
Template Settings	<u>Find</u> View All First 🗖 1 of 1 🖸 Last
*Effective Date:	01/01/1980
*Effective Status:	Active
*Description:	Requisition Default
Short Description:	Req Dflt
Templates	
Standard Requisition	Continuous Job Opening
Resume Template ID:	1000 🔍 Default
Job Opening Template ID:	1000 🤍 Requisition Default
Job Opening Posting ID:	1000 Rosting
Screening Template ID:	1000 🤍 Full Screening Commercial
Employee Referral Program:	
Interview Evaluation Template:	1000 Q Default Interview
*Load Rqmts from Job Profile:	Not Used 💌
Segmenting Values	

Recruitment Template page

Templates

Standard Requisition	Select this check box to make the template available for use with job openings that are standard requisitions.
Continuous Job Posting	Select this check box to make the template available for use with job openings that are continuous job postings.
Resume Template ID	Select the resume template that you want to link to this recruitment template.
Job Opening Template ID	Select the job opening template that you want to link to this recruitment template.

Job Opening Posting ID	Select the job opening posting template that you want to link to this recruitment template.	
Screening Template ID	Select the screening template that you want to link to this recruitment template.	
Employee Referral Program	Select the employee referral program that you want to link to this recruitment template. Define employee referral programs in the Employee Referral Program (HRS_REF_PGM) component.	
	See Chapter 24, "Managing Employee Referral Programs," page 699.	
Interview Evaluation Template	Select the interview evaluation template that you want to link to this recruitment template.	
(load requirements from job	Select a source from which the system pulls profile content into a new job opening. The options are:	
profile)	• Not Used	
	• Job Code	
	• Job Family	
	Position	
	• Salary Grade	
	If you select an option other than <i>Not Used</i> , the system looks for a job profile that is associated with the indicated object. For example, if you select <i>Job Code</i> , then when a user creates a new job opening, the system looks for a job profile that is associated with the job code entered on the Primary Job Opening Information page. If one is found, the content items from that profile are imported into the new Job Opening.	
	Note. If you use full profile integration, Oracle recommends that you choose Not Used for this field. Full profile integration enables you to pull information from up to three explicitly identified profiles into job openings, and if the system attempts to pull in additional profile data based on the setting in this field, there can be errors if the total number of profiles from both sources exceeds three. Additionally, the automatic use of profiles in addition to the ones that the user explicitly identifies could be confusing to users.	
Segmenting Values	Click to display the Segmenting Values page, where you can identify specific subsets of your job openings that use this template.	

See Also

PeopleSoft HR 9.1 PeopleBook: Manage Profiles, "Getting Started with Manage Profiles"

Assigning Segmentation Values to Recruitment Templates

Access the Segmentation Values page (click the Segmenting Values link on the Recruitment Template page).

Recruitment Template			
Segmentation Values			
Recruitment Template ID:	Recruitment Template 100		
Effective Date:	07/05/2001		
Segmentation Values	Customize Find 🖾 🛗 First 🗹 1-2 of 2 🗖 Las	st	
Job Family Description			
KADMIN Administrative	Support	ì	
KCLERK 🤍 Clerical	1	Ì	
Add Job Family			

Segmentation Values page

Segmentation Values

<segmentation value=""></segmentation>	The contents of this grid, and therefore the label for the first column, depend on the how you've chosen to segment your templates (a choice you make in the Template Segmenting Type field on the Recruiting Installation - General page).
	List the segmentation values that use this recruitment template. For example, if you segment templates by job family, then list the job families that use this recruitment template. If you segment templates by department, use the grid to list the departments that use this template.
	When a user creates a job opening, the primary job data includes a field for the segmenting value. If the system finds a recruitment template with a segmentation value that matches the job opening, it applies that recruitment template to the job opening. For example, if the job opening is for the KADMIN job family, then a recruitment template that lists the KADMIN job family in the Segmentation Values grid is applied. If there are no such recruitment templates, the system applies the default recruitment template indicated on the Recruiting Installation - General page.

See <u>Chapter 2</u>, "Defining Installation Options for Recruiting," Defining General Settings for Templates, <u>Approvals</u>, and Integrations, page 11.

See Chapter 13, "Creating Job Openings," page 231.

Chapter 10

Setting Up Third Party Integrations

This chapter provides an overviews of third party integrations and discusses how to:

- Set up recruiting vendors.
- Set up autoscreening for data received from vendors.
- Set up data mapping.
- Set up resume email accounts.
- Review the integration transaction log.

See Also

Chapter 14, "Managing Job Postings," Posting Jobs to PeopleSoft Services Procurement, page 343

Understanding Third Party Integrations

This sections provides overviews of:

- The open integration framework.
- Job board setup.
- Resume extractor setup.
- Background screener setup.

The Open Integration Framework

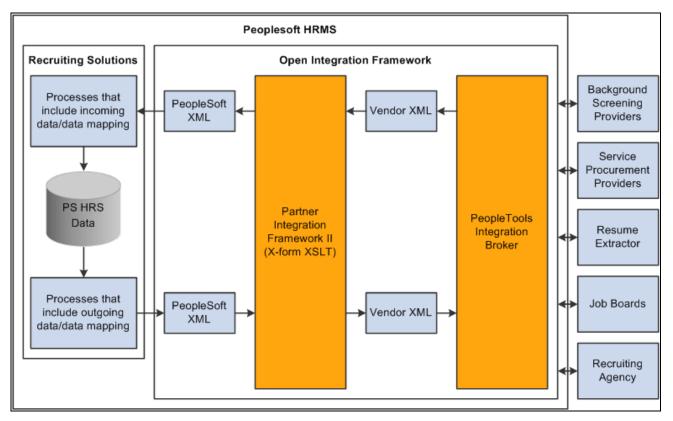
Sharing job opening and candidate information is essential to the success of the recruitment process. PeopleSoft provides an open integration framework that enables you to integrate with:

- Staffing suppliers.
- Resume extractors.
- Background screening providers.

This generic open integration framework enables customers to integrate with any third party provider that they choose. For incoming data, the process is initiated by an incoming message. Using PeopleSoft PeopleTools Integration Broker, the open integration framework process reads the XML document contained in the message and uses the standard XSLT to transform the XML according to the vendor's specifications. Finally, the open integration framework maps the transformed data to the corresponding recruiting data and processes that information.

For outgoing data, a functional process such as posting a job opening or requesting a background screening check initiates the outgoing message. The process reads from the recruiting tables and uses data mapping to create an XML document. This initial XML document may be changed into to an HR-XML document. Another change is then applied to either the initial XML document or to the subsequent HR-XML document, depending on the supplier's needs, to create a final document. The final document is then sent using PeopleSoft PeopleTools Integration Broker

This diagram illustrates how the Open Integration Framework manages the exchange of information between PeopleSoft Recruiting Solutions and external service providers:



The Open Integration Framework manages integration between PeopleSoft Recruiting Solutions and external systems

Job Board Setup

Job board vendors enable you to post job openings to vendors such as job boards, services procurement providers, and recruitment agencies. To set up job board vendors:

- 1. Set up the job board vendor in the Vendor Setup component.
- 2. Set up a recruitment source in the Recruitment Sources component, and associate it with the vendor.

3. (Optional) Set up data mapping to support the recruitment source.

Integration With PeopleSoft Service Procurement

Oracle delivers prebuilt integration points between Talent Acquisition Manager and PeopleSoft Service Procurement. The *PeopleSoft Service Procurement PeopleBook* provides detailed information about this integration and how to set it up. The integration requires those recruiting users who post jobs to Services Procurement to also be users of the Services Procurement system, with identical user IDs and passwords in both systems.

See Chapter 14, "Managing Job Postings," Posting Jobs to PeopleSoft Services Procurement, page 343.

Resume Extractor Setup

Resume extractors enable users to start with a resume in electronic form (such as HTML, PDF, DOC, and so on) and have the information from that resume extracted into more meaningful data. Applicants might embed resumes in email messages as either text or an attachment, and then the resume extractor can process as much information as it can recognize and load data into the PeopleSoft applicant related tables. Similarly, applicants can use their electronic resume to prepopulate their online job applications in PeopleSoft Candidate Gateway when they apply for jobs online. Recruiters can also use the extraction process to load data from resumes that they receive into the PeopleSoft applicant related tables. Finally, staffing providers can send resumes that require an extraction process.

To set up resume extractors:

1. Set up the resume extractor.

Follow the vendor-provided instructions.

2. Set up the resume extractor vendor.

Additional Setup Steps for Different Channels

Applicant resumes can come into the Recruiting Solutions system from one of several channels. The additional setup that you must complete to utilize resume extraction functionality varies slightly depending on the channels that the organization uses to receive resumes. For example, the additional setup that you must complete to receive resumes through email is different from the setup that you must complete to accept resumes from applicants who apply online through Candidate Gateway. However, the setup steps that you use to set up the actual resume extractor vendor are exactly the same for all channels. Therefore, you can set up a single resume extractor to use for all channels, or use a different resume extractor for each.

Step	Apply Online	Email	Open Integration Framework	Resume Load Process
1	Set up a resume	Set up a resume	Set up a resume	Set up a resume
	extractor (might be	extractor (might be	extractor (might be	extractor (might be
	optional)	optional)	optional)	optional)
2	Set up a resume	Set up a resume	Set up a resume	Set up a resume
	extractor vendor	extractor vendor	extractor vendor	extractor vendor

This table describes the setup steps for each channel:

Step	Apply Online	Email	Open Integration Framework	Resume Load Process
3	Set up a site	Set up an email server and email account to receive resumes	Set up a job board vendor	N/A
4	N/A	Set up an email node definition	N/A	N/A
5	N/A	Set up an email account	N/A	N/A
6	(Optional) Set up Marketing type recruitment sources	Set up a Vendor type recruitment source	Set up a Vendor type recruitment source	(Optional) Set up Marketing type recruitment sources
7	(Optional) Create data mapping assignment for site	(Optional) Create data mapping assignment for recruitment source	(Optional) Create data mapping assignment for recruitment source	(Optional) Create data mapping assignment for recruitment source

Note. Step one might be optional because although an organization can set up and maintain a resume extractor locally, some resume extractor providers might want to set up and maintain the resume extractor remotely. Whether the step is optional depends on the agreement between the resume extractor provider and the organization.

Background Screener Setup

Background screeners enable recruiters or managers to request formal background checks on applicants that are nearing completion of the recruitment process and are about to be hired. To set up background screeners:

- 1. Set up pre-employment vendors.
- 2. (Optional) Set up data mapping to support the pre-employment vendor.

Setting Up Recruiting Vendors

To set up recruiting vendors, use the Vendor Setup (HRS_VENDOR_SETUP) component.

This section provides an overview of how to set up recruiting vendors and discusses how to:

- Load a vendor configuration file.
- Define settings for pre-employment vendors.

Understanding How to Set Up Recruiting Vendors

Regardless of the type of recruiting vendor you are going to set up, you must complete some common tasks:

1. Set up your local gateway using PeopleTools Integration Broker.

See PeopleTools: Integration Broker PeopleBook

2. Verify security and class setup.

PeopleSoft delivers the permission list HCCPRS1010 and the role RS Technical Administrator for this purpose. To have full access to all integration components, the permission list must be linked to the menu HRS_HROI.

3. Load the vendor-provided configuration file.

Work with the vendor to obtain this file.

4. (Optional) Map competencies, accomplishments, and postal codes from the vendor to PeopleSoft Recruiting Solutions.

Although data mapping is optional, it makes integration much more effective.

Page Name	Definition Name	Navigation	Usage
Vendor Setup	HRS_VENDOR_FILE	Set Up HRMS, Product Related, Recruiting, Integration, Vendor, Vendor Setup	Load a new vendor configuration file, or view and modify details after loading a vendor configuration file.
Pre-Employment Vendor Setup	HRS_PREEMPL_VNDR	Click the Extended Setup link on the Vendor Setup page.	Define settings for pre- employment vendors.
Integration Test	HRS_VENDOR_TEST	Click the Test link for a transaction on the Vendor Setup page.	Test vendor integration.

Pages Used to Set Up Recruiting Vendors

Loading a Vendor Configuration File

Access the Vendor Setup page (Set Up HRMS, Product Related, Recruiting, Integration, Vendor, Vendor Setup).

Open Integration Framework	
Vendor Setup	
Upload	
Submit Configuration File	

Vendor Setup page in Add a New Value mode

Submit Configuration File Click to display a File Attachment dialog box, where you identify and upload the vendor's configuration file. After the system uploads the file, this button is hidden and the page instead displays page elements that you use to review and configure the vendor data.

Configuring Vendors

Access the Vendor Setup page (Set Up HRMS, Product Related, Recruiting, Integration, Vendor, Vendor Setup).

When you access an existing vendor, or after you upload the configuration file for a vendor that you are adding, the page displays vendor setup fields.

Open Integration Framework				
Vendor Se	Vendor Setup			
Transaction Gro	up: PreEm	ployment	Version:	1
Vendor Setup				
*Long Name:	HireRight, Inc		*Status:	Active
*Short Name:	HireRight			
Description:	Hire Safe. Hire S	mart. HireRight	<u>ح</u>	
Filename:	, New_HireRight.:	zin		Submit File
The function		pdates on Upload		
	Vendor Administration			
	Extended Setup			
Transactions				
Transaction		*Log Style	Node	Test
PreEmployment	Check	Log All	HROI 8	<u>Test</u>
PreEmployment	Status	Log All	HROI 9	<u>Test</u>
PreEmployment	PreEmploymentExpense Log All		HROI 10	<u>Test</u>
PreEmployment	PreEmploymentView Log All		HROI 11	<u>Test</u>
VendorAdminist	ration	Log All	HROI 12	<u>Test</u>
Transaction:				•

Vendor Setup page after loading vendor configuration file

The Vendor Setup and Transactions group boxes are automatically populated with the information that is provided in the configuration file. The transactions that appear in the Transactions group box are those that are defined on the Open Integration Framework - Transaction Group Setup page for the transaction group that is associated with the vendor configuration file.

Vendor Setup

Status

Indicate whether the vendor is Active or Inactive.

Allow Node Updates on Upload	The node definitions are set up by the process of loading the vendor configuration file. If subsequent loads of the file are necessary (perhaps a customer gets an updated configuration file from the vendor), the Allow Node Updates on Upload check box enables the user to update the node definition or keep allowing the nodes to be updated.	
Vendor Administration	Click to access the vendor's administration page. Not all vendors will support this option.	
Extended Setup	Click to access the Pre-Employment Vendor Setup page, where you can define settings for pre-employment vendors. This link appears only for vendors in the PreEmployment transaction group, based on the setup in th Extension Configuration group box on the Open Integration Framework - Transaction Group Setup page.	
Transactions		
Log Style	Defines when to log messages on the Integration Log page. Values are:	
	<i>Log All:</i> An entry is entered into the integration log every time a message is received from the vendor.	
	Never Log: An entry is never made to the integration log.	
	<i>On Error:</i> An entry is made to the integration log only when an error occurs.	
Node	Displays the node name that is associated with the vendor's transaction. These node names are dynamically created. Click a node link to access the Connectors page in PeopleTools Integration Broker.	
Test	Click to access the Integration Test page, where you can test the integration setup for outgoing messages. The Test links do not apply to incoming transactions.	

Defining Settings for Pre-Employment Vendors

Access the Pre-Employment Vendor Setup page click the Extended Setup link on the Vendor Setup page).

Open Inte	egration Framework		
Pre-Em	Pre-Employment Vendor Setup		
Preemploy	vment Vendor		
Name:	HireRight, Inc		
Status:	Active		
Options			
	Display Adjudication	Uiew Results on External Site	

Pre-Employment Vendor Setup page

Display Adjudication	Select this check box to make the adjudication status visible to managers, recruiters, and recruiting administrators on the Manage Applicants - Pre- employment Check and Pre-employment Check - Pre-employment Check Details pages. If you deselect this check box, the system displays <i>Not Displayed</i> in the Adjudication Status fields on these pages.
View Results on External Site	Select this check box to make the View Results link on the Pre-employment Check - Pre-employment Check Details page visible to managers, recruiters, and recruiting administrators. Users click the View Results link to access a detailed page of the pre-employment inquiry on the vendor site.

Testing Vendor Integration

Access the Integration Test page (click the Test link for a transaction on the Vendor Setup page).

Integration Test	
Integration Test	
Label	Value
Person ID	
Run Test Cancel	

Integration Test page

Integration TestThis grid lists the fields that require data in order for the test to be
performed. Enter values for each field.

Run Test

Click to test the integration. The system displays the Integration Log page, where you can review the results of the test.

Setting Up Autoscreening For Data Received from Vendors

To set up autoscreening for data received from vendors, use the AutoScreen Setup (HRS_AUTOSCREEN) component.

This section provides an overview of autoscreening and discusses how to set up autoscreening criteria for resumes received from vendors.

Understanding Autoscreening

Autoscreening definitions represent one or more application classes for screening applicant data that is received from a third-party vendor.

You associate an autoscreening definition with a vendor when you set up the recruitment source definition for the vendor.

See Chapter 11, "Setting Up Recruitment Sources," page 207.

Page Used To Set Up Autoscreening For Data Received from Vendors

Page Name	Definition Name	Navigation	Usage
AutoScreen Setup	HRS_AUTOSCREEN	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, AutoScreen, AutoScreen Setup	Identify an application class to automatically screen incoming applicant data. You reference autoscreening definitions from recruiting source definitions for vendors.

Setting Up Autoscreening Criteria for Vendor Recruitment Sources

Access the AutoScreen Setup page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, AutoScreen, AutoScreen Setup).

AutoScreen		
AutoScre	en Setup	
AutoScreen S	etup	
*Name:	Email Verification	
*Status:	Active	
*Description:	Email Verification	EJ
Application Cl	asses	Customize Find 🖓 🛗 First 🚺 1 of 1 🖸 Last
Application Clas	ss Name	
Verify Email		Q

AutoScreen Setup page

Setting Up Data Mapping

To set up data mapping, use the Data Mapping Assignments (HRS_DM_MAP_SETUP), Category Setup (HRS_DM_CAT_SETUP), Data Mapping (HRS_DM_MAPPING), and Postal Map (HRS_HRXML_POSTAL) components.

This section provides an overview of data mapping and discusses how to:

- Create data mapping assignments.
- Set up categories.
- View key lists.
- View value lists.
- Map unmapped data.
- Map keys.
- Map values.
- Map inbound postal information.
- Map outbound postal information.

Understanding Data Mapping

Data mapping enables you to take information coming into your system, run it through an interpreter, and then have it presented to you in a format that fits your system. Data mapping is also used for outgoing messages in a similar fashion. The types of data mapping are:

- Assignments and categories.
- Postal.
- Predefined mappings.

Assignments and Categories

Data mapping assignments define how the system translates the words or phrases coming into the system to the words or phrases used by your system. You can set up data mapping definitions based on site, recruitment source, vendor, or the default All mapping. You can also have just one data mapping definition to everything coming into your system.

Data mapping categories are data objects that are used by the assigned maps to define how data is mapped. PeopleSoft delivers 11 data mapping categories:

- Competencies.
- Honors and Awards.
- Language (accomplishment).
- Licenses and Certifications.
- Memberships.
- Degrees.
- Major.
- School.
- Country.
- State/Providence.
- Language (translate values).

These delivered data mapping categories were created to support Manage External Postings, Resume Management, and Background Screening. You can create a new data mapping category; however, some development work is necessary to define an appropriate application class.

For example, suppose a user creates a new entry in the School table for Stanford University with School ID = Stanford. This alone is not enough to map school data to or from the school ID Stanford. To begin mapping to or from this ID, the user must first run the synchronization process after creating the entry for Stanford University. To enable users to more efficiently process the synchronization for data mappings, PeopleSoft delivers a batch process that enables users to synchronize all data mapping categories at the same time. To initiate this process, navigate to PeopleTools, Process Scheduler, System Process Requests and create a new run control. Click the Run button, select a process server, select the Datamapping Sync (HRS_DM_SYNC) process, and click OK.

Postal

When postal information needs to be exchanged between an XML document and a Recruiting Solutions database, decisions of how this exchange occurs must be determined. This determination is at the country level.

Data Mapping Setup Steps

To set up data mapping:

- 1. Create data mapping assignments.
- 2. Synchronize data for each data mapping category.
- 3. (Optional) Create the Verity indexes for each category.
- 4. Establish postal mappings for each country's postal address.
- 5. Establish the necessary open integration framework vendors.

Pages Used to Set Up Data Mapping

Page Name	Definition Name	Navigation	Usage
Assigned Mapping Setup	HRS_DM_MAP_SETUP	Set Up HRMS, Product Related, Recruiting, Integration, Data Mapping Assignments, Assigned Mapping Setup	Create data mapping assignments.
Category Setup	HRS_DM_CAT_SETUP	Set Up HRMS, Product Related, Recruiting, Utilities, Data Mapping Categories, Category Setup	Set up categories.
Key List	HRS_DM_CAT_KEYLIST	Set Up HRMS, Product Related, Recruiting, Utilities, Data Mapping Categories, Key List	View key lists.
Value List	HRS_DM_CAT_VALLIST	Set Up HRMS, Product Related, Recruiting, Utilities, Data Mapping Categories, Value List	View value lists.

Page Name	Definition Name	Navigation	Usage
Unmapped Data	HRS_DM_UNMAPPED	Set Up HRMS, Product Related, Recruiting, Integration, Data Mapping, Unmapped Data	Map unmapped data.
Key Data Mapping	HRS_DM_MAPING_DICT	Set Up HRMS, Product Related, Recruiting, Integration, Data Mapping, Key Data Mapping	Map keys.
Value Data Mapping	HRS_DM_VALUE	Set Up HRMS, Product Related, Recruiting, Integration, Data Mapping, Value Data Mapping	Map values.
Inbound Map	HRS_HRXML_PSTL_IN	Set Up HRMS, Product Related, Recruiting, Integration, Postal Map, Inbound Map	Map inbound postal information.
Outbound Map	HRS_HRXML_PSTL_OUT	Set Up HRMS, Product Related, Recruiting, Integration, Postal Map, Outbound Map	Map outbound postal information.

Creating Data Mapping Assignments

Access the Assigned Mapping Setup page (Set Up HRMS, Product Related, Recruiting, Integration, Data Mapping Assignments, Assigned Mapping Setup).

Datamapping Setup	
Assigned Mapping Setup	
Assigned Map	Customize Find 🗖 🛗 First 🖬 1-2 of 2 🗖 Last
Select	Description
All	ALL + -
HireRight, Inc	HireRight -

Assigned Mapping Setup page

Assigned Map

Use this group box to specify the vendors, sites, or recruitment sources that will not use the default data map. The description is used on the Unmapped Data, Key Data Mapping, and Value Data Mapping pages.

Setting Up Categories

Access the Category Setup page (Set Up HRMS, Product Related, Recruiting, Utilities, Data Mapping Categories, Category Setup).

Category Setup	Key List Value List
Category Setup	
*Long Name:	State
*Short Name:	State *Status: Active -
*Description:	State
*AppClass:	State Run Sync Now

Category Setup page

AppClass (application class)	Select an application class category. These categories are defined on the Application Class Registry page.
Run Sync Now (run synchronization now)	Click to synchronize the data that is associated with the selected data mapping category with the data actually existing in the corresponding component. This process populates the Key List and Value List pages.

Viewing Key Lists

Access the Key List page (Set Up HRMS, Product Related, Recruiting, Utilities, Data Mapping Categories, Key List).

Category Setup	Key List	<u>V</u> alue List	
Key List			
Category: State			
Keys		Customize Find View 100 🖾 🛗 First 🗹 1-15 of 1639 🕨 Last	
SubCategory-	Keys▼	Description	
ARG	<u>BA</u>	Buenos Aires	
ARG	CF	Capital Federal	
ARG	CT	Catamarca	
ARG	<u>CH</u>	Chaco	
ARG	<u>CB</u>	Chubut	
ARG	<u>co</u>	Cordoba	
ARG	CR	Corrientes	
ARG	ER	Entre Rios	
ARG	FO	Formosa	
ARG	JU	Jujuy	
ARG	<u>LP</u>	La Pampa	
ARG	LR	La Rioja	
ARG	MZ	Mendoza	
ARG	М	Misiones	
ARG	NQ	Neuquen	

Key List page

Subcategory	Serves as a secondary key for the data mapping functionality. Not all categories use the subcategory secondary key. Subcategories themselves must also be data mappings.
Keys	Displays the primary key for the category. These keys are determined by the data in the associated data mapping category tables. Click the key link to access the Key Data Mapping page. This page displays all the values that are mapped to the given key.

Viewing Value Lists

Access the Value List page (Set Up HRMS, Product Related, Recruiting, Utilities, Data Mapping Categories, Value List).

Category Setup	Key List Value List	
Value List		
Category: Sta	ite	
Values	Customize Find View 10	00 🗖 🛗 First 🗹 1-15 of 4917 🕨 Las
SubCategory	Keys▲	Language
ARG	ARG BA	English
ARG	ARG_CB	English
ARG	ARG_CF	English
ARG	ARG CH	English
ARG	ARG_CO	English
ARG	ARG_CR	English
ARG	ARG_CT	English
ARG	ARG ER	English
ARG	ARG FO	English
ARG	ARG JU	English
ARG	ARG LP	English
ARG	ARG LR	English
ARG	ARG MI	English
ARG	ARG MZ	English
ARG	ARG NQ	English

Value List page

The Value List page lists all the values that are being mapped to a category key. Click a link in the Keys column to access the Value Data Mapping page.

Mapping Unmapped Data

Access the Unmapped Data page (Set Up HRMS, Product Related, Recruiting, Integration, Data Mapping, Unmapped Data).

Unmapped Data	Key Data Mapping Value Data Mapping
- Search	
Value:	
Assigned Map:	•
Category:	School
Language:	v
Search	

Unmapped Data page (1 of 2)

Minimum Sc	ore: Make S	uggestions				
Unmapped	Data			Custo	omize Find 🗖	First K 1-5 of 5 Las
Category	Value	Language	*Key ID	Description	*Assigned Map	*Use
School	St . Mary 's College	English	KPC32	St. Xavier's College	ALL 💌	Unmapped 🔽
School	University of California	English	KNS002 -	University of Amsterdam	ALL 💌	Unmapped 💌
School	College of San Mateo	English	KPI35 -	Symbiosis Institute of Busines	ALL 💌	Unmapped 💌
School	University of Florida	English	F00010 -	Florida State	ALL 💌	Unmapped 🔽
School	College of Palo Alto	English	KPU02	Anna University	ALL -	Unmapped -

Unmapped Data page (2 of 2)

Minimum Score	Identifies a threshold for the Make Suggestions search. Only results that ar greater than or equal to the minimum score appear in the Key ID field. The score of every suggestion found appears to the right of each key ID item in parentheses.		
Make Suggestions	Click to run a search that provides a suggested mapping based on the minimum score that you entered.		

Mapping Keys

Access the Key Data Mapping page (Set Up HRMS, Product Related, Recruiting, Integration, Data Mapping, Key Data Mapping).

Unmapped Data	Key Data Mapping Value Data Mapping
- Search	
Key:	
Value:	
Assigned Map:	
Category:	School
Language:	×
Search	

Key Data Mapping page (1 of 2)

Key Results			<u>Find</u> View A	ll First 🗹	1 of 1 🗈 Last
Key:	KPU13				
Description:	Agra Uni	versity			
Category:	School				
SubCategory:					
Values		<u>Custo</u>	mize Find 🗖 🛗 🛛 F	irst 🚺 1-3	of 3 🖸 Last
Value		Assigned Map	Language Code	*Use	Go
KPU13		ALL	English	In C 💌	Go
Agra Univers	sity	ALL	English	Bot -	Go
IND_KPU13		ALL	English	In C 💌	Go
Insert		•			

Key Data Mapping page (2 of 2)

This page displays a complete list of all the values that are mapped to a given key.

Values

This group box enables you to add other values to the key. The values must be chosen from the unmapped data values.

Value

Select the values that are associated with the key.

Assigned Map	Select the data mapping assignment that the key is associated with.
Language Code	Select the language that the value is assigned to
Use	Select to use this data mapping for incoming data, outgoing data, or both.
Insert	Click to add a row to the group box.

Mapping Values

Access the Value Data Mapping page (Set Up HRMS, Product Related, Recruiting, Integration, Data Mapping, Value Data Mapping).

Unmapped Data	Key Data Mapping Value Data Mapping
- Search	
Key:	
Value:	
Assigned Map:	•
Category:	School
Language: Search	•

Value Data Mapping page (1 of 2)

Value Results	Find	View All Firs	t 🕻 1 of 1 🖸 Las
			+
Value:	New York University		
Category:	School		
SubCategory:			
Language:	English		
Keys	Customize Find 🗖	First	1 of 1 🖸 Last
Кеу	Assigned Mapping ID	*Use	Go
F00012	ALL	Both 💌	Go
Insert			

Value Data Mapping page (2 of 2)

Displays all the keys that are mapped to the given value.

Keys

This group box displays all the keys that are mapped to the value and enables you to map more keys to the value. The keys that you add come from the unmapped data values.

Key	Select the key ID of the data mapping.		
Assigned Mapping ID	Select the data mapping assignment that the key is associated with.		
Use	Select to use this data mapping for incoming data, outgoing data, or both.		

Mapping Inbound Postal Information

Access the Inbound Map page (Set Up HRMS, Product Related, Recruiting, Integration, Postal Map, Inbound Map).

Inbound Map	Outbound	Map			
Country:	ANT Neth	erlands Antill	es		
Inbound Posta	l Mapping			<u>Cus</u>	tomize Find 🗖 🛗 First 🗹 1-9 of 9 D Last
Field Name	Edit Label Override	Include in Display?	Line Number	Position Number	HR XML Postal
ADDRESS1			1	1	
ADDRESS2			2	1	
ADDRESS3			3	1	
ADDRESS4		V	4	1	
CITY		V	5	1	_
COUNTRY					
COUNTY			6	1	
POSTAL			5	3	
STATE			5	2	
Map Default					

Inbound Map page

This page displays the field names that are associated with the Country table.

HR XML Postal	Select the XML element where you want the corresponding PeopleSoft field to be written for incoming messages.
Map Default	Click to have the system make an initial guess at what the mapping from the XML should be.

Mapping Outbound Postal Information

Access the Outbound Map page (Set Up HRMS, Product Related, Recruiting, Integration, Postal Map, Outbound Map).

Country: ANT Netherlands Antilles						
Outbound Postal Mappings Customize Find 🗷 🛗 First 🚺 1-9 of 9 🖸 Las						
Field Name	Edit Label Override	Include in Display?	Line Number	Position Number	HR XML Postal	Sequence
ADDRESS1		\checkmark	1	1	AddressLine[1]	
ADDRESS2		\checkmark	2	1	AddressLine[2]	
ADDRESS3		\checkmark	3	1	AddressLine[3]	
ADDRESS4		\checkmark	4	1	AddressLine[4]	
CITY		\checkmark	5	1	Municipality	
COUNTRY					CountryCode	
COUNTY		$\overline{\checkmark}$	6	1		
POSTAL		\checkmark	5	3	Postal Code	
STATE		V	5	2	Region[1]	

Outbound Map page

This page displays the address field names that are associated with the Country table.

HR XML Postal	Select the XML element where you want the corresponding PeopleSoft field to be written for outgoing messages.
Map Default	Click to have the system make an initial guess at what the mapping from the XML should be.
Sequence	When multiple data elements from the PeopleSoft address table are mapped to a single element in the XML document, the sequence number determines the order in which the PeopleSoft fields are mapped.

Setting Up Resume Email Accounts

To set up resume email accounts, use the (HRS_EMAIL_SETUP) component.

This section provides an overview of resume email accounts and discusses how to:

- Set up resume email accounts.
- View lists of emails.
- View email attachments and select resumes.

Understanding Resume Email Accounts

If the organization requires applicants or staffing suppliers to submit resumes using email, you must set up one or more email accounts to receive those emails. In most cases, the applicants that send resumes to an email account are external applicants.

The system can process resumes that applicants send using email as attachments and resumes that are included in the body of the email message. If no attachment is found on the email, the system assumes that the resume is in the body of the email message. The system enables recruitment administrators to select which part of the email is the resume that will be passed to the resume extractor on the View Email Message/Attachments page.

The system does not support multiple resumes per email. If the system receives an email with multiple attachments, it processes the email as a single applicant even if it contains resumes from multiple applicants. This enables an applicant to send individual cover letter, resume, and reference attachments.

Setting Up Resume Email Accounts

To receive incoming resumes by email:

- 1. Set up an email account, user name, password, and email server to receive resumes.
- 2. Set up a resume extractor vendor.

See Chapter 10, "Setting Up Third Party Integrations," Setting Up Recruiting Vendors, page 180.

3. Set up a recruitment source of type Vendor to associate with the incoming emails.

See Chapter 11, "Setting Up Recruitment Sources," Setting Up Recruitment Sources, page 212.

4. Set up an email node on the Connectors page.

PeopleSoft delivers the following standard email node: MCF_GETMAIL.

a. You must select a valid value in the Value column for the MCF_AttRoot property.

This value specifies where email attachments are temporarily stored. The MCF_AttRoot value is supplied to the Path field on the Resume Email page by default when you create a new email account.

- b. Select *True* in the Value column for the MCF_Force_Download_Attachments property.
- 5. Create an email account on the Resume Email page.

Associate the email address, user name, password, email server, resume extractor vendor, recruitment source, and email node with the email account.

6. (Optional) Set up data mappings to support applicants from the recruitment source.

Processing Emails

To process emails that you receive in the email account:

1. Run the Email Checking Process Application Engine process (HRS_HROI_EML).

When you run this process, the system checks the email account for emails, deletes the emails from the email account in box, and writes the emails to the database. Because the system deletes all emails from the email account in box, you should not use a personal email address when you create the email account. The emails that the system writes to the database appear on the Email List page. The system stores all content from the email in the database, including the HTML, text, subject line, email address, and attachments.

2. Run the Process Awaiting Email Application Engine process (HRS_PRCS_EML).

This process extracts data from the resumes for all email messages that are written to the database. The system processes all resumes that appear on the Email List page.

The recruitment source that you assign to the email account determines how the system handles incoming resumes. For example, the system uses the resume extractor, country, and language that you associate with the recruitment source to extract data from the resumes, and the system uses the screening setup parameters that you specify for the recruitment source to determine which status to assign to each resume and what notification to send to each applicant, if any, based on the assigned status.

Schedule the Email Checking Process and Process Awaiting Email processes to run by using the Process Scheduler Request page in PeopleTools. You can also manually run the Email Checking Process by clicking the Check Email button on the Email List page.

See PeopleTools: PeopleSoft Process Scheduler PeopleBook

Page Name	Definition Name	Navigation	Usage
Email Setup	HRS_EMAIL_SETUP	Set Up HRMS, Product Related, Recruiting, Integration, Resume Email, Email Setup	Set up resume email accounts where organizations or individuals will send resumes.
Email List	HRS_EMAIL_LIST	Set Up HRMS, Product Related, Recruiting, Integration, Resume Email, Email List	View a list of emails that have been retrieved from the email account.
View Email Message/Attachments	HRS_EMAIL_VIEW	Click the subject link for an email that is listed on the Email List page.	View email attachments and select resumes.

Pages Used to Define Resume Email Accounts

Setting Up Resume Email Accounts

Access the Email Setup page (Set Up HRMS, Product Related, Recruiting, Integration, Resume Email, Email Setup).

Email Setup	Email List
Email Setup	
*Status:	Active
*Email:	resume_890A@rt.peoplesoft.com
*User:	resume_890A
*Password:	•••••
*Server:	tl-mail01
*Node:	MCF_GETMAIL
*Path:	c:\temp
*Source:	Bestway Job Board
Test Settings	

Email Setup page

Status	Select a status: <i>Active</i> or <i>Inactive</i> . If you select <i>Inactive</i> , the system does not run the Email Checking Process. However, the system does run the Process Awaiting Emails process for all resumes in the Awaiting Resolution state.
Email, User, and Password	Enter the email address where you want to receive applicant emails, and the user ID and password for the email address.
Server	Enter the email server where you set up the email address.
Node	Select the node that you set up to receive emails. PeopleSoft delivers the following standard email node: MCF_GETMAIL.
Path	Enter the path where the email node stores email attachments. By default, the value that you specify for the MCF_AttRoot property on the Connectors page appears here.
Source	Select the recruitment source with which you want to associate the incoming emails. Only recruitment sources with a source type of Vendor appear in the prompt. This is not a required field; however, you should populate this field with a source to properly manage incoming resumes. Define recruitment sources by using the Source Setup (HRS_SOURCE_SETUP) component.

Test Setting

Click to test the setup. In this process, the system obtains an email count. If the system can get a count, even if the count is zero, the setup is a success. A success or fail message appears depending on whether the setup is a success or failure.

Viewing Lists of Emails

Access the Email List page (Set Up HRMS, Product Related, Recruiting, Integration, Resume Email, Email List).

Email Setup Email List	
E-mail	
0 e-mail messages have been received through this account.	
Check Email	

Email List page

Email

Use this group box to view a list of emails that have been retrieved from this email address.

Resume Attachment	Displays the filename of the attachment that the system has selected to use as the applicant's resume in the resume extraction process. The system always selects the last attachment to use as the applicant's resume. If no attachments are in the email message, the system uses the text in the email message for the applicant's resume. If you determine that the attachment that the system selects is not the applicant's resume, use the View Email Message/Attachments page to select the appropriate attachment. Click an attachment link to view the file.
Email From	Displays the email address of the sender.
Subject	Displays the text that appears as the subject for the email. Click to access the View Email Message/Attachments page, where you can view the email message text and email attachments, and select the attachment that you want the system to use as the applicant's resume in the resume extraction process.
Date From	Displays the date and time that the email was received in the email account.
Additional Page Element	
Check Email	Click to run the Email Checking Process.

Viewing Email Attachments and Selecting Resumes

Access the View Email Message/Attachments page (click the subject link for an email that is listed on the Email List page).

Use this page to view the email message text and email attachments, and select the attachment that you want the system to use as the applicant's resume in the resume extraction process.

Message	Displays the exact message text from the email message.
Attachments	
Attachments	Displays all of the attachments that the system detects in the email message. Click an attachment link to view the file. The Plain Text attachments contain the actual message text from the email message.
Set Resume	Click to set the associated attachment as the applicant's resume. This button is inactive for the attachment that the system selects as the resume.

Reviewing the Integration Transaction Log

This section discusses how to review the integration transaction log.

Pages Used to Review the Integration Transaction Log

Page Name	Definition Name	Navigation	Usage
Integration Log	HRS_HROI_LOG	Set Up HRMS, Product Related, Recruiting, Integration, Integration Log, Integration Log	Review the integration transaction log.
Integration Log Outgoing Msg (integration log outgoing message)	HRS_HROI_LOG_O_XML	Click a transaction link on the Integration Log page.	Review detailed information about outgoing messages.

Reviewing the Integration Transaction Log

Access the Integration Log page (Set Up HRMS, Product Related, Recruiting, Integration, Integration Log, Integration Log).

Open Integration Fram	iework			
Integration Log				
▼ Search Integration Log				
Status:				
Vendor:				
Transaction ID:		•		
Last Updated From:	Ħ	To:		
Search				
Search Results			Customize Find View All	🔁 🛗 First 🗹 1 of 1 🖸 Last
Transaction	Transaction Type	Vendor	Last Updated	Status
PreEmploymentCheck	OutSync	TestPreEmployment	06/08/2009 3:19PM	Connection Failure

Integration Log page

Search Results

This group box displays the messages received from vendors that match the search criteria that you enter in the Search Integration Log group box.

Reviewing Outgoing Message Details

Access the Integration Log Outgoing Msg page (Click a transaction link on the Integration Log page).

ntegration Log Outgoing Msg	
Open Integration Framework	
Outgoing Message Details	
Request	
xml version="1.0"? <soap-env:envelope xmlns:soap-<br="" xmlns:soap-enc="http://schemas.xmlsoap.org/soap/encoding/">ENV="http://schemas.xmlsoap.org/soap/envelope/" xmlns:m="http://peoplesoft.com/HCM/Schema" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"> <soap-env:body> <soap-env:body> <m:input> <values> <values> <value></value></values></values></m:input></soap-env:body></soap-env:body></soap-env:envelope>	
/endor Request xml version="1.0"? <soap-env:envelope xmlns:soap-<br="" xmlns:soap-enc="http://schemas.xmlsoap.org/soap/encoding/">ENV="http://schemas.xmlsoap.org/soap/envelope/" xmlns:m="http://peoplesoft.com/HCM/Schema" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"> <soap-env:body> <soap-env:body> <m:lnput> <values> <value> <value> <toold{tabular}< td=""><td></td></toold{tabular}<></value></value></values></m:lnput></soap-env:body></soap-env:body></soap-env:envelope>	

Integration Log Outgoing Msg page

This page includes the following fields that display detailed information about integration messages:

- Request
- Vendor Request
- Vendor Response
- Response
- Error

Chapter 11

Setting Up Recruitment Sources

This chapter provides an overview of recruitment sources, lists prerequisites, and discusses how to:

- Set up recruiting contacts.
- Set up recruitment sources.

Understanding Recruitment Sources

Recruitment sources represent avenues for finding applicants for your job openings. The system uses recruitment sources in two ways:

• Posting Destinations are places where you publish information about your job openings.

When you create job postings, you specify the destinations for each posting. In the field where you identify your posting destination, the list of available options comes from the recruitment source table.

See Chapter 13, "Creating Job Openings," Adding Job Posting Details and Destinations, page 308.

• *Referral Sources* are places where applicants learn about job openings.

Applications include a section where applicants provide information about where they learned about the job opening. This section is always visible when a recruiter views the application using Talent Acquisition Manager. You use resume templates to control whether this section appears in the online application form that an applicant uses in Candidate Gateway. In both locations, in the field where you identify your posting destination, the list of available options comes from the recruitment source table.

See Chapter 15, "Entering Applicant Data," Entering Job Applications, page 359.

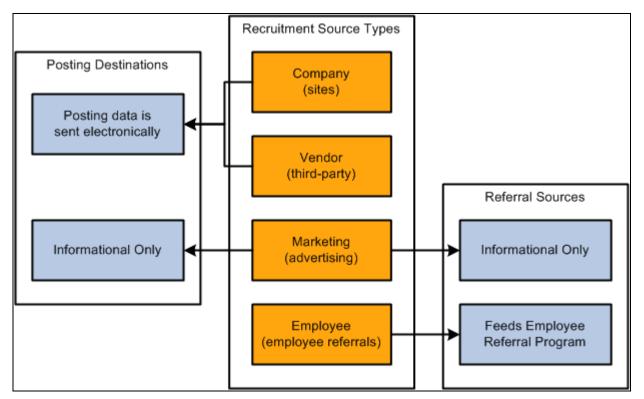
The Four Types of Recruitment Sources

PeopleSoft delivers four types of recruitment sources. All source types can include descriptions and contact information, but each type also has its own type-specific setup. The following table describes the four source types:

Source Type	Usage	Description	Type-Specific Setup
Company	Posting destination	Your organization's own Candidate Gateway job sites, as defined in the Site Definition pages.	Specify one or more Candidate Gateway sites where the job opening is posted when the source is used as a posting destination. See <u>Chapter 6, "Setting Up</u> <u>Candidate Gateway Sites,"</u> <u>Setting Up Sites, page 91.</u>
Vendor	Posting destination	Third-party vendors with whom you integrate using the open integration framework. Examples might include job boards, recruiting agencies, and service procurement providers.	Specify various integration options, including the vendor definition, autoscreening options, resume extraction settings, and notifications. See <u>Chapter 10, "Setting</u> <u>Up Third Party</u> <u>Integrations," Setting Up</u> <u>Recruiting Vendors, page</u> <u>180.</u>
Marketing	 Posting destination Referral source 	 Places where you advertise job openings. Examples might include internet or email advertisements, print advertisements, and job fairs. The system enables you to track the use of marketing sources either as posting destinations or as referral sources. This data is informational only. There is no integration with other systems, and there are no delivered reports for this data. 	Identify which Candidate Gateway sites permit applicants to select the marketing source in the referrals section of the online job application. Optionally define subsources. For example, if you have a source for magazines, you could list specific publications as subsources.

Source Type	Usage	Description	Type-Specific Setup
Employee	Referral source	Employee referrals. On the pages where recruiters and applicants identify referral sources, selecting an employee referral source causes the system to display fields for identifying the employee who made the referral. The system uses this data for processing awards under employee referral programs that you administer within the recruiting system.	Identify which Candidate Gateway sites permit applicants to select the employee source in the referrals section of the online job application.

The following diagram illustrates the uses of the four recruitment source types. In the diagram, three source types (Company, Vendor, and Marketing) can be used as posting destinations, while two source types (Marketing and Employee) can be used as referral sources:



Uses for the four types of recruitment sources

Prerequisites

Before you set up recruitment sources, set up your Candidate Gateway sites.

See Chapter 6, "Setting Up Candidate Gateway Sites," Setting Up Sites, page 91.

Additionally, for vendor recruitment sources, also set up:

1. Vendor definitions.

See Chapter 10, "Setting Up Third Party Integrations," Setting Up Recruiting Vendors, page 180.

2. Autoscreening definitions.

See <u>Chapter 10, "Setting Up Third Party Integrations," Setting Up Autoscreening For Data Received from Vendors, page 186.</u>

Setting Up Recruiting Contacts

To set up recruitment sources, use the Recruitment Contacts (HRS_CONTACT) component.

This section provides an overview of recruiting contacts and describes how to set up recruiting contacts.

Understanding Recruiting Contacts

Recruiting contacts are people who are associated with specific recruiting sources such as a third-party staffing agency. When you set up a recruiting contact, you specify name, address, phone, and email information. You do not prompt against your HR employee records to identify recruiting contacts, as recruiting contacts are typically third party representatives.

Recruiting contacts are not members of the job opening hiring team, but you can associate recruiting contact with jobs using the Recruitment Contact field in the Opening Information section of the Job Opening page.

When you associate a recruiting contact with a *Vendor* type recruitment source, you can also specify whether the contact is acting as the proxy for applicants that the vendor supplied. If you activate the proxy option, then pages that show applicant contact information also show the contact information for the proxy. When you send correspondence to an applicant who uses a proxy, the system sends the correspondence to the proxy, not the applicant.

Page Used to Set Up Recruiting Contacts

Page Name	Definition Name	Navigation	Usage
Contact Setup	HRS_CONTACT	Set Up HRMS, Recruiting, Recruitment Sources, Recruitment Contacts, Contact Setup	Define contact information (name, address, phone, and email) for recruiting sources. You reference recruiting contacts from recruiting source definitions.

Setting Up Recruiting Contacts

Access the Contacts - Contact Setup page (Set Up HRMS, Recruiting, Recruitment Sources, Recruitment Contacts, Contact Setup).

Contacts			
Contact Se	etup		
Contact			
Code:	PROC *	Contact Type: Office	
Description:	PS Services Procurement		
Short Description	n: SPro		
Name:	Tabatha Tanner		
Address			
Country:	United States	•	
Address 1:	545 Baker Avenue		
Address 2:			
Address 3:			
City:	San Jose		
State:	California	•	
Postal:	94352		
County:			

Contact Setup page (1 of 2)

Telephone			
Phone Details			
Phone Type	Country Code	Telephone	
Main 💌		408/235-8395	+ -
Email Address			
Email Address			
Email Addresses:	RecruiterAdmins	@MyGBI.com	

Contact Setup page (2 of 2)

Contact

Contact Type Select the type of contact. Values are *General,Office*, and *Source*.

Address

Enter the address for this contact.

Telephone

Enter the telephone numbers for this contact.

Email Addresses

Enter the email addresses for this contact.

Setting Up Recruitment Sources

To set up recruitment sources, use the AutoScreen Setup (HRS_AUTOSCREEN) and Source Setup (HRS_SOURCE_SETUP) components.

This section discusses how to:

- Define general information for recruitment sources.
- Define settings for company recruitment sources.
- Define settings for marketing and employee recruitment sources.
- Define settings for vendor recruitment sources.
- Define contacts for a recruitment source.

Pages Used to Set Up Recruitment Sources

Page Name	Definition Name	Navigation	Usage
Source Setup	HRS_SOURCE_BASIC	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Recruitment Sources, Source Setup	Select a recruitment source type and define basic information for a source.

Page Name	Definition Name	Navigation	Usage
Company	HRS_SOURCE_CMPNY	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Recruitment Sources, Company	Define sites for a company recruitment source.
Marketing	HRS_SOURCE_MKT	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Recruitment Sources, Marketing	 Define sites and subsources for marketing recruitment sources. Define sites for employee recruitment sources.
Vendor	HRS_SOURCE_VNDR	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Recruitment Sources, Vendor	Identify a third-party vendor and enter additional processing rules for vendor recruitment sources.
Contacts	HRS_SOURCE_CONTACT	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Recruitment Sources, Contacts	Define contacts for all types of recruitment sources.

Defining General Information for Recruitment Sources

Access the Source Setup page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Recruitment Sources, Source Setup).

Source Setup	Vendor <u>C</u> ontacts			
Source Setup		<u>Find</u> View All Fi	irst 🚺 1 of 1 D Last	
			+ -	
Source Name:	Executive Recruiters	Source Type:	Vendor	
*Effective Date:	01/01/1900 🛐	*Status:	Active 💌	
*Description:	Executive Recruiters - Requires	proxy for all applicants	<u>ر</u> ا ا	

Source Setup page

Source Name

Effective Date

Enter a source name. You cannot edit this field after you save the source.
Enter an effective date. The only page in the system where you can select a source prior to the effective date is the Job Opening - Posting Information

Chapter 11

	source prior to the effective date is the Job Opening - Posting Information page. On this page, you can select a future-dated source as long as the effective date of that source is within the posting dates for that posting.
Status	Select Active or Inactive. Inactive sources do not appear in system prompts.
Description	Enter a description. This field is used only for informational purposes.
Source Type	Select a source type: <i>Company,Employee,Marketing</i> , or <i>Vendor</i> . The source type that you select here controls the pages that appear in this component. When you select a source type, the Company, Marketing, or Vendor page appears, depending on the source type that you select.

Defining Settings for Company Recruitment Sources

Access the Company page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Recruitment Sources, Company).

Note. This page appears only for recruitment sources with the source type Company.

Source Setup	Company <u>C</u> ontacts		
Source Setup			
Source Name:	Internet		
Effective Date:	01/01/1900		
Sites		Customize Find 🔄 🛗 First 🚺 1 of 1	Last
Site			
Default Site		•	+ -

Company page

Site

Select one or more sites. When a recruiter or hiring manager creates a job opening and selects to post the job opening to this source, the system posts the job opening to all of the sites that you select here. The sites that you select here override the default security that you set up. For example, when a recruiter creates a job opening for a position in business unit A, the default security might restrict the job opening to sites that are used only to post job openings for business unit A. On this page, you can select sites that are used to post job openings for business units A, B, and C. When the recruiter selects this company source to post to, the job opening is posted to all sites regardless of the default security. Define sites on the Site - Site Setup page.

Defining Settings for Marketing and Employee Recruitment Sources

Access the Marketing page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Recruitment Sources, Marketing).

ource Setup Marketing <u>C</u> ontacts		
ource Setup		
Source Name: Magazines		
Effective Date: 01/01/1900		
Access by Site Id	Customize Find 🖾 🛗 First 🚺 1-4 of 4	Last
Site		
GBI Corprate - Internal Site		+ -
GBI Corprate - External Site		+ -
GBI Media - Internal Site	▼	+ -
GBI Media - External Site	•	+ -
Subsources	Customize Find 🗖 🛗 First 🚺 1-4 of 4	Last
Subsource Description	*Status	
The New Yorker	Active	+
The Economist	Active	+
The Wall Street Journal	Active	+
Other	Active	+

Note. This page appears only for recruitment sources with the source type *Marketing* or *Employee*.

Marketing page when the recruitment type is Marketing

Source Setup	larketing <u>C</u> ontacts		
Source Setup			
Source Name:	Employee		
Effective Date:	01/01/1900		
Access by Site lo	i	Personalize Find 🗖 🛗 First 🗹 1	-3 of 3 🕨 Last
Site			
Default Site		•	+ -
GBI Corprate - Ex	ternal Site	•	+ -
GBI Media - Exter	rnal Site	•	+ -

Marketing page when the recruitment type is Employee

Access by Site ID

Use this grid to specify which Candidate Gateway sites list this recruitment source as a valid referral source. For example, if you are defining a recruitment source for your internal employee newsletter, you would associate that source with the internal sites used by the employees who receive that newsletter.

Once a source is associated with a site, applicants who apply for jobs on that site can select that source in the How did you find out about us? field in the online application form (if the resume template includes the Referrals section).

Subsources

If the source type is *Marketing*, you can use this grid to define subsources. When a user selects a source on the online application pages in Candidate Gateway (or on the Load Resume - Prepare Load Parameters page), the user also can select a subsource from a list of values that you define here. Only active subsources appear as valid options. You cannot edit or delete the subsource description that you enter after you save the source.

Note. Although the Marketing page appears when the source type is either *Marketing* or *Employee*, the subsources grid is appears only for the *Marketing* source type, not for the *Employee* source type.

Defining Settings for Vendor Recruitment Sources

Access the Vendor page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Recruitment Sources, Vendor).

Source Setup Vendor Contacts		
Source Setup		
Source Name: Execu	tive Recruiters	
Effective Date: 01/01/	/1900	
Vendor		
Vendor:		
Site ID:	GBI Corprate - External Site	
Info URL:		
Screening		
Unresolved:		
	Email Verification	
Reject:		
Draft:	Default Status - Always Fail	
*On Extraction Failure:	Reject 💌	
	Retain Position Association	
	Notify On Screening	

Note. This page appears only for recruitment sources with the source type Vendor.

Vendor page (1 of 2)

Notifications			
Unresolved:		Q	
Rejected:			
Draft:			
Success:		٩,	
Extractor			
Default Extractor:		V	
Language:	English	V	
Country:	United States	•	

Vendor page (2 of 2)

Vendor

Vendor	Select a vendor to which organizations will post job openings or from which they will receive applicants. The only vendors that you can select from are vendors from the JobBoard transaction group.
Site ID	Select the site to which applicants will be redirected when they receive an email notification that requires them to go to an online application site to enter or review information.
Info URL (information uniform resource locator)	Enter the URL that determines where users can go to view the job postings for this source.

Screening

Unresolved, Reject, and Draft	Select the autoscreen definition that you want to associate with each status. During the autoscreen process, the system processes the statuses in this order:
	1. Reject
	2. Unresolved
	3. Draft
	The system starts with the first status (Reject) and checks the associated autoscreen definition. If the applicant does not pass the autoscreening criteria, the process stops and the system assigns the Reject status to the resume. If the applicant passes the autoscreening criteria, or if no autoscreening definition is associated with the status, the process moves on to the next status (Unresolved). If the applicant passes all three statuses, the system assigns the status Success to the resume.
	Before any autoscreening can begin, the extraction process must be successfully complete. Define autoscreening criteria on the AutoScreen Setup page.
On Extraction Failure	Select the status that you want to assign to a resume if resume extraction fails for the resume.
Retain Position Association	Select to have the system retain the job opening with which the resume is associated. This option is valid only for applicants that the system receives through open integration framework. For all other cases, no association with a job opening exists.
Notify On Screening	Select to notify applicants after the screening process is complete. If you select this option, the system uses the values that you specify in the Notifications group box to determine which notification to send.

Notifications

Use this group box to select the notification that the system sends to each applicant whose resume meets the respective status. For the system to send these notifications, you must select the Notify on Screening option in the Screening group box.

PeopleSoft delivers four templates, one for each status. When you create a new source, the system populates each of the fields with the associated notification. If you do not select a notification for a status, the system doesn't send a notification for that status.

These are the default values:

Field	Notification
Unresolved	HRS_HROI_UNRESOLVED
Rejected	HRS_HROI_REJECTED

Field	Notification
Draft	HRS_HROI_DRAFT
Success	HRS_HROI_SUCCESS

Extractor

Default Extractor	Select the default resume extractor that the system uses for non-XML resumes that come from this source. However, note that you can process resumes through another extractor by using the Manage Resumes (HRS_AL_LOG) component.
Language	Select a language in which the resumes are written. Some resume extractors require a language to begin the extraction process.
Country	Select a country. Some resume extractors require a country to begin the extraction process.

Defining Contacts for a Recruitment Source

Access the Contacts page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Recruitment Sources, Contacts).

Source Setup Vendor Contacts			
Contacts			
Source:	Executive Recruiters		
Effective	Date: 01/01/1900		
Contact	S	Customize Find View All 🗖 🛗 First 🗹 1 of 1 🗖 Last	
Proxy	Primary Contact Name	Email Addresses	
•	Heidi Howthorne	k Heidi_Howthorne@ERecruiters.co 🛨 🖃	

Contacts page

Proxy	Select to have the system create a proxy for incoming applicants from this source. This proxy functionality applies only to Vendor source types.	
	When a staffing supplier submits a resume, it is common not to contact the applicant to whom the resume belongs. Instead, all communication with the applicant, up until the interview with the applicant, is done through the staffing supplier. The person at the staffing supplier organization who handles this duty is referred to as a proxy. The proxy takes on all responsibilities of the applicant and is both responsible and expected to act in the best interest of the applicant. On system pages that show applicant contact information, the contact information for the proxy is also included. When you send correspondence to an applicant who uses a proxy, the system sends the correspondence to the proxy, not the applicant.	
Primary Contact Name and Email Addresses	Select a contact. You can select from any contact that has a contact type of general. When you select a contact, the system populates the Email Addresses field with the email address of the contact. Define contacts on the Contacts - Contacts Setup page.	

Chapter 12

Understanding Approval Delegation in Talent Acquisition Manager

This chapter provides overviews of:

- Talent Acquisition Manager delegations.
- The delegation framework.
- Delivered delegation definitions for recruiting.
- The delegation process

Talent Acquisition Manager Delegations

Talent Acquisition Manager uses delegation to authorize one person to serve as another person's representative when performing the following actions:

- Approving a job opening.
- Approving a Job offer.

There is no special approval processing when the process includes a proxy. The proxy simply replaces the delegator in the chain.

The delegation framework gives the proxy:

• Access to the Pending Approvals page and workflow notifications for pending approvals.

The Maintain Delegated Authority (HCDL_BATCH) Application Engine process grants the proxy the necessary access. Be sure to run this process regularly.

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Delegation," Processing Batch Delegation Requests.

While a delegation is active, the proxy sees the delegated transactions in the Pending Approvals component; when the delegation period ends, any pending approval requests are removed from the proxy's queue and rerouted back to the delegator.

The Maintain Delegated Authority process does not grant access to the Recruiter Alerts pagelet, but if the proxy has access to the pagelet, the delegated approval transactions are also included in the proxy's alerts during the delegation period.

• Access to the Job Opening page through links on the Pending Approvals page and in workflow notifications.

Proxies are given access to the job opening through the Pending Approvals page, but proxies who do not otherwise have direct access to the Job Opening component (for example, using the Find Job Opening page) do not get direct access by virtue of being a proxy.

• Authority to approve, deny, or push back the transaction.

When a proxy takes action, the proxy's name appears in the job opening details as the approver of the job opening or job offer.

• Authority to modify job opening or job offer details, even if not part of the hiring team.

The Delegation Framework

PeopleSoft HCM applications use a common approval and delegation framework. This overview discusses:

- Delegation terminology.
- Delegation options.
- Delegation framework pages.

Note. This overview provides only basic information about the delegation framework, which is documented in detail in *PeopleSoft HRMS Application Fundamentals PeopleBook*.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Delegation"

Delegation Terminology

The following terms are important to understanding the delegation feature:

Delegation	The act of giving one's authority to another user.	
Delegator	A person that delegates authority to another user.	
Proxy	A person granted authority to act on behalf of another user.	
Delegated Authority	The rights and privileges that are given from the delegator to the proxy.	
Delegation Request	A request from the delegator to the proxy to take on delegated authority.	
Delegation Period	The time range in which the delegated authority is in effect.	

Delegation Administrator	The system administrator who is responsible for configuring, managing, and maintaining delegated authorities.
Revoke	When a delegator withdraws delegated authority.

Delegation Options

The delegation framework supports the following types of delegation:

- Downward delegation of authority to a direct report or another person lower down in the reporting hierarchy.
- Upward delegation of authority to a manager or another person higher up in the reporting hierarchy.
- Lateral delegation of authority to a peer either within the same division or in a different division within the reporting hierarchy.

Note. To prevent situations of cascading or circular delegation chains, once the delegation framework passes delegated authority over a transaction to a proxy, the proxy cannot delegate authority over that transaction to another user. The delegation framework only passes authority over transactions from initial delegator to initial proxy.

Delegation Framework Pages

Use these pages to review and manage delegation data:

1. Review delegation transactions for workflow on the Register Workflow Transaction page.

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Delegation," Registering Workflow Transactions.

2. Review delegation permission lists and roles through PeopleTools Security components.

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Delegation," Setting Up Permission Lists and Roles for Delegation.

3. Define installation settings for delegation on the Delegation Installation Settings page.

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Delegation," Defining Delegation Installation Settings.

4. Review transactions for delegation on the Configure Delegation Transaction page.

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Delegation," Configuring Delegation Transactions.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Delegation," Navigating Delegation Components

Delivered Delegation Definitions for Recruiting

This overview discusses:

- Delivered workflow transactions.
- Delivered permission lists and roles for delegation.
- Installation Settings
- Delivered delegation transactions.

Delivered Workflow Transactions

Talent Acquisition Manager delivers these two approval transactions that are preconfigured for delegation:

Transaction Name	Transaction Type	Description
JobOpening	Approve	Job opening approval.
JobOffer	Approve	Job offer approval.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Delegation," Registering Workflow Transactions

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Approvals," Linking Workflow Transactions

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Approvals," Setting Up Approval Process Definitions

Delivered Permission Lists and Roles for Delegation

Talent Acquisition Manager delivers permission lists that are required for use of the Delegation framework. This table describes the delivered recruiting roles for the delegation framework:

Role Name	Attached Permission Lists	Description
Delegate_JobOpening_Approve	HCCPDL2021 (Approve Job Opening)	Provides access to the Pending Approvals component and to the pages needed to view job opening details.

Role Name	Attached Permission Lists	Description
Delegate_JobOffer_Approve	HCCPDL2029 (Approve Job Offer)	Provides access to the Pending Approvals component and to the pages needed to view job offer details.

Note. Generally, users who can access an existing job opening can create a new job opening using either the Create New or Clone icons at the top of the Job Opening page. However, these icons are hidden from proxies who are not recruiting users. The system determines if a proxy is a recruiting user by comparing the proxy's roles to the roles that you include on the Recruiting Roles page.

See <u>Chapter 7, "Setting Up Recruiting Roles and Security," Assigning PeopleTools Roles to Recruiting Role</u> <u>Types, page 102.</u>

The delegation framework provides additional permission lists for users and administrators of the delegation framework.

- The delegation administrator permission list, HCCPDL1000, is associated with the delivered HCM Delegation Admin role.
- The delegation user permission list, HCCPDL1100, enables delegation users (both delegators and proxies) access to the Manage Delegation home page.

When implementing delegations, make sure that all of your delegation users are associated with this permission list. As delivered, the permission list is associated with the Manager and Employee roles, but you must analyze delegation security requirements based on your organization's security configuration.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Delegation," Setting Up Permission Lists and Roles for Delegation

PeopleTools: Security Administration PeopleBook

Installation Settings

Delegation installation settings control which users can be chosen as proxies. The settings are global (that is, they apply to all applications in your HCM system).

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Delegation," Defining Delegation Installation Settings.

Delivered Delegation Transactions

This table lists the delegation transactions delivered for Talent Acquisition Manager:

Transaction Name	Transaction Type	Role
Job Openings	Approve	Delegate_JobOpening_Approve
Job Offers	Approve	Delegate_JobOffer_Approve

Note. All transactions are delivered inactive.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Delegation," Configuring Delegation Transactions

The Delegation Process

This section provides an overview of delegation through self service.

Note. This overview provides only basic information about the delegation process, which is documented in detail in *PeopleSoft HRMS Application Fundamentals PeopleBook*.

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Delegation," Working with Self-Service Delegation.

Delegator Delegates Approval Authority

A delegator follows these steps to delegate approval authority:

- 1. Navigate to the Manage Delegation component (Self Service, Manage Delegation).
- 2. Click the Create Delegation Request link.

Delegators who have multiple jobs will have to indicate the job for which they are delegating approvals.

- 3. Enter From Date and To Date for the delegation request, then click the Next button.
- 4. Select the transactions to be delegated (job opening approval, job offer approval, or both), then click the Next button.
- 5. Select a proxy.
- 6. Select the Notify Delegator check box, then click Submit.
- 7. Click OK.

The system generates a notification to the selected proxy.

Proxy Accepts Delegation Request

A proxy follows these steps to accept approval authority:

- 1. Navigate to the Manage Delegation component (Self Service, Manage Delegation).
- 2. Click the Review My Delegated Authorities link to access the My Delegated Authorities page.
- 3. Click the Accept button.

Alternatively, the proxy can click the Reject button to reject the delegation.

The Delegation Authority Ends

The delegator can manually revoke the delegation, or the delegation can end because it has reached its end date. In both cases, any pending approvals are removed from the proxy's queue and added back to the delegator's queue.

Chapter 13

Creating Job Openings

This chapter provides overviews of job openings and profile integration for job openings, then it discusses how to:

- Enter primary job opening information.
- Enter basic job opening data.
- Work with multiple job codes in a job opening.
- Add staffing and salary information.
- Add job qualifications.
- Add screening questions to a job opening.
- Set up screening for a job opening.
- Create job postings.
- Identify recruiting team members for a job opening.
- Create job openings from positions or from other job openings.
- Approve job openings.

Understanding Job Openings

This section discusses:

- Job opening data.
- Job opening creation methods.

Job Opening Data

Although the exact format of the job opening page depends on your template configuration, job opening information falls into these categories:

• Basic job opening data.

Every job opening template must include this section.

- Staffing and salary information.
- Qualifications
- Screening questions.
- Screening levels and criteria.
- Job posting information.
- Hiring team members.

Note. Other than the required section for basic job opening data, all sections on the Job Opening page are optional. They appear only when included in the relevant job opening template.

See Chapter 9, "Setting Up Recruiting Templates," Setting Up Job Opening Templates, page 150.

Basic Job Opening Data

Basic job information refers to data such as:

- How many openings are to be filled?
- Where is the job located?
- What is the job code or position number?
- Where does the job fit in the organization's structure?

See Chapter 13, "Creating Job Openings," Entering Basic Job Opening Data, page 253.

Staffing and Salary Information

Once you have provided the job code, position ID, or both, the system automatically sets default values in many of the staffing and salary information fields. Much of this information can be used later as screening criteria.

See Chapter 13, "Creating Job Openings," Adding Staffing and Salary Information, page 269.

Qualifications

This area defines what requirements are expected from someone who fills this job opening. This information can be used as screening criteria.

Other than a matrix that determines the minimum amount of work experience that is required for applicants with various levels of education, the qualification sections of a job opening are profile-based. That is, each type of qualification (say, competencies or degrees) has been defined in the Manage Profiles business process in PeopleSoft Human Resources and then further configured for use in Talent Acquisition Manager.

The system provides options for automatically entering profile-based job qualification data by copying profile data from existing person or non-person profiles, and you can optionally configure the job opening template to include a section where you can review profile usage within the job opening.

Even if you import profile data from existing profiles, you can still remove, change, and add to the default profile data that the system enters in the job opening.

See <u>Chapter 13, "Creating Job Openings," Understanding Profile Integration for Job Openings, page 234</u> and <u>Chapter 3, "Setting Up Profile Integration," page 25.</u>

See Chapter 13, "Creating Job Openings," Adding Job Qualifications, page 273.

Screening Questions

If applicants apply for a job opening using PeopleSoft Candidate Gateway, the application form includes any screening questions that are associated with a job opening and activated for screening. (However, you cannot use open-ended questions for prescreening).

Questions have their own scoring system, and during the screening process, questionnaire points are used in the determination of the applicant's overall screening results.

See Chapter 13, "Creating Job Openings," Adding Screening Questions to a Job Opening, page 279.

Screening Levels and Criteria

Screening levels are defined on the Screening Definition page. They define the screening processing rules, not the actual screening criteria.

Screening levels can be linked to screening templates, which are in turn linked to recruitment templates. When you create a job opening, the template configuration thus provides a default set of screening levels for the job opening. You can add or delete screening levels as necessary.

Screening criteria defines the specific job requirements used by the system to compare an applicant's qualifications to those of the job opening for the specified screening level. Use the Job Opening Screening Criteria page to select job opening-specific criteria for each level.

The job opening attributes that are available for use as screening criteria fall into four groups:

- *General requirements* come from fields that you populate in the Job Information and Salary Information sections of the Job Opening page.
- *Education and experience requirements* come from the Education and Experience section of the Job Opening page.
- *Screening questions* are created outside of the job opening and then added to the Screening Questions section of the Job Opening page.
- *Profile content types* are job opening attributes whose properties are configured in the Manage Profiles module in PeopleSoft Human Resources.

See Chapter 13, "Creating Job Openings," Setting Up Screening for a Job Opening, page 285.

Job Posting Information

Job posting information consists of the posting title, one or more posting description types, and one or more posting destinations.

See Chapter 13, "Creating Job Openings," Creating Job Postings, page 306.

Hiring Team Members

Identify the recruiter, hiring manager, interview team, screening team, and any interested parties for the job opening. Members of any of these groups can access both the job opening and the data for any applicant who is associated with the job opening.

See <u>Chapter 13</u>, "Creating Job Openings," Identifying Recruiting Team Members for a Job Opening, page 312

Job Opening Creation Methods

There are three methods of creating job openings:

- Use the Create a New Job Opening (HRS_JO_LAUNCH) component to enter primary job opening information, then continue to the Job Opening (HRS_JOB_OPENING) component to enter complete data for the job opening.
- Use the Create Job from Position (HRS_CRJOB) process to create job openings from open positions.
- Use the Clone Job Opening (HRS_JO_CLONE_SEC) component to create a new job opening by copying an existing one.

Note. If job opening approvals and delegations are active, and if the authority to approve job openings is delegated to a proxy, the proxy is able to access the job opening data. Generally, users who can access an existing job opening can create a new job opening using either the Create New or Clone icons at the top of the Job Opening page. However, if the proxy does not belong to a recruiting role, these icons are hidden.

See Also

Chapter 13, "Creating Job Openings," Creating Job Openings from Open Positions, page 320

Understanding Profile Integration for Job Openings

This overview discusses:

- Profile architecture.
- Profile integration options.
- Full profile integration.
- Limited profile integration.

Profile Architecture

You create and manage profiles using the Manage Profiles business process in PeopleSoft Human Resources. To understand profile integration for job openings, you must be familiar with profile architecture, including these terms:

Profile	An organized collection of data that represents attributes of a person or of a business object such as a job code.
	Profiles are widely used by organizations to describe the attributes of jobs or individuals. Typically, profiles summarize the competencies, qualifications, and skills of a job or a person.
Content Type	A category of information in a profile. Delivered content types that support recruiting processes include competencies, languages, memberships, degrees, licenses & certificates, and so forth.
Content Item	A specific attribute that is associated with a particular content type. For example, for the content type <i>Competencies</i> , content items are specific competencies such as analytical thinking or the ability to prioritize tasks.
Instance Qualifier	A value that is used to organize and filter content items. For example, competency ratings are organized according to the evaluation type (self-evaluation, manager evaluation, and so forth). This is possible because the evaluation type is being used as an instance qualifier.
Profile Type	Profile types define the structure of your profiles. A profile type includes content types, but not content items. That is, a particular profile type might include content types such as competencies and memberships, but it does not reference particular competencies or particular memberships.
	The profile type also defines whether the profile is linked to person IDs to create person profiles, or linked to business entities, such as job code or positions, to create non-person profiles.
	Four profile types are delivered as system data. Use the CLUSTER, ROLE, and JOB profile types to create non-person profiles, and the PERSON profile type to create profiles that describe your employees.

Primary Person Profile Type A specific person profile type that you select on the Assign Profile Defaults page. The system uses this profile type to identify the content types that are available for use in Talent Acquisition Manager. Although all content types in the primary person profile type are available for use, you can configure the system to use a subset of the content types on specific pages. The Content Section Configuration page controls which content types are available to use in resume templates and job opening templates. It also controls the content type properties that are available for use in screening. See Chapter 5, "Setting Up Screening Processes," Making Content Types Available for Screening, page 72. Resume templates control which the content types appear to applicants who apply online using Candidate Gateway. See Chapter 9, "Setting Up Recruiting Templates," Setting Up Resume Templates, page 133. Job opening templates control which content types appear on the Job • Opening page. See Chapter 9, "Setting Up Recruiting Templates," Setting Up Job Opening Templates, page 150. All of the content types appear on the Application Data page, where you enter profile information that might be applied to any job opening.

See Chapter 15, "Entering Applicant Data," page 349.

Profile Integration Options

When creating job openings, you can automatically populate the profile-based job qualifications with content items from selected profiles. For example, when replacing a key employee, you can copy attributes such as competencies and languages from the employee's profile into the job opening. Similarly, you can pull requirements from a job profile. You can even combine requirement sources by selecting multiple profiles from which to load requirements.

You can also update a non-person profile that is designated as the primary profile for the job opening directly from the job opening. For example, when you are creating a job opening, the hiring manager might provide updated requirements that you can then transfer back to the job profile, maintaining consistency and eliminating redundant work efforts. The updates happen only if the Update Primary Profile check box for the primary profile is selected, and only if the job opening has an open status.

The system provides two options for adding profile-based job qualification data to job openings:

• Full profile integration, which enables you to copy profile data from existing person or non-person (job) profiles that you explicitly identify.

For example, when replacing a key employee, you can copy attributes such as competencies from the employee's profile into the job opening. Similarly, you can pull requirements from a job profile.

• Limited profile integration, which automatically populates profile data using job profiles that are associated with the job code, job family, position, or salary grade for the job opening.

This option is intended for use when full profile integration is *not* active. Although the system does not prevent you from using this option in addition to full profile integration, Oracle does not recommend this configuration.

Full Profile Integration

Full profile integration enables users to explicitly select the profiles whose content items are to be copied into the job opening. Existing profile content comes from both person and non-person profiles. When you activate full profile integration on the Recruiting Installation - General page, you choose whether to use both types of profiles or only non-person profiles.

Profile Selection and Usage

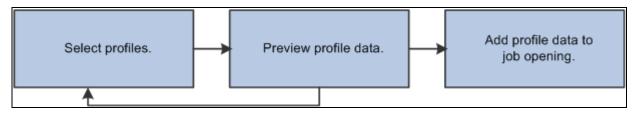
Under full profile integration, you select profiles with content that you want to copy into the job opening. You select these in the Person Profile grid and the Non-Person Profile grid on the Primary Job Opening Information page, before you access the main Job Opening page.

In addition to the profiles that you explicitly select in these grids, the system also uses JOB profiles that are associated with other job opening data that you enter on the Primary Job Opening Information page. Data elements that can be associated with profiles include job codes, position numbers, job families, and salary grades.

Also, if you segment your job openings by job profile, there is an additional Job Profile field on the page, separate from the grids where you otherwise identify profiles to use. If you segment by job profile, this is a required field, and the profile you enter is treated the same as any other profile from which the system copies data. (Note, however, that the Non-Person Profile grid accepts any non-person profile, while the separate Job Profile field accepts only JOB profiles.)

Before the system displays the job opening, it displays a preview page that shows you the profile data that will be pulled from the selected profiles. You can review the data and then decide whether to continue to the job opening or return to the previous page to change your profile selection.

This diagram illustrates the process of selecting profiles, previewing their content, and adding the content to the job opening:



Profile selection process

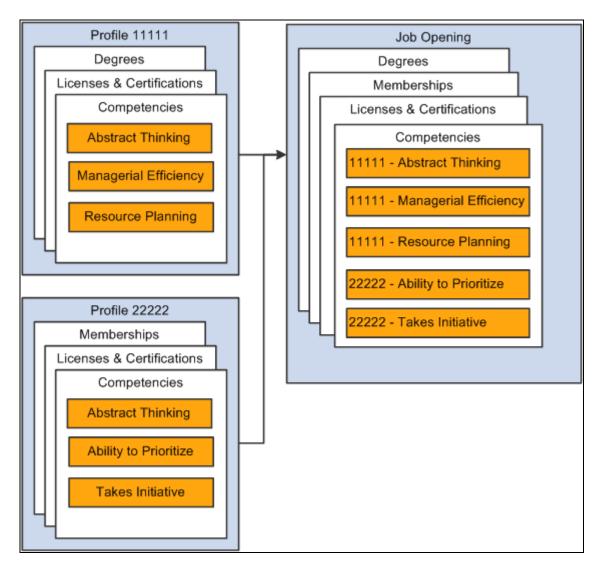
Profile Copying

When the system copies profile data, it copies only the content items for the content types that appear in the job opening. (The content types in a job opening depend on the job opening template). For example, if the job opening has sections for competencies and degrees, but not for language skills, then any language skills in the source profile are not copied to the job.

The system copies content items only if the content type structure is the same in the source profile and in the primary person profile type. Additionally, only content items with the same instance qualifier setup as the primary person profile type are copied. For example, if you select a nonperson JOB profile to copy, but its instance qualifiers for competencies are different from those of the competency content type in the primary person profile type, then any competencies associated with the ROLE profile are not copied into the job opening.

Note. When copying content items with instance qualifiers, the system copies only items with instance qualifiers that are viewable by employees. The ability for employees to view specific instance qualifiers is part of the instance qualifier setup in the Manage Profiles business process.

This diagram illustrates the flow of content items from the source profiles into the job opening. In the diagram, the system copies data from two profiles into the job opening. Competencies from both profiles are added to the job opening, and each competency in the job opening retains information about the profile from which it came.



Consolidating profile content from multiple profiles

Note. Competencies that exist in both source profiles are added to the job opening only once. If multiple profiles have the same content item (for example, an identical competency), and one profile has a version with a later effective date, then the system brings that later version and its Profile ID into the job opening.

The Primary Profile and Profile Updates

When you copy data from multiple profiles into a job opening, you must designate one of the profiles as the primary profile. Any content items that you add to the job opening are associated with the primary profile, unless there is a profile type configuration incompatibility, in which case the profile ID for the new content item is 0. (The system also assigns a profile ID of 0 when there are no profiles associated with the job opening.)

If the primary profile is a non-person profile, you have the option to update the profile based on changes you make to the job opening data; to activate this option, select the Updates Allowed check box for the primary profile.

For example, when you create a job opening, the hiring manager might provide updated requirements that you can then transfer back to the job profile, maintaining consistency and eliminating redundant work efforts.

Instance Qualifiers and Competencies

In job openings, content types represent desirable (or required) attributes for applicants. For many content types, the applicant either will or won't have the attribute. For example, for the Licenses & Certifications content type, an applicant who has a particular content item has the license and meets the requirement.

Competencies present a more complex situation because they include a rating scale and an evaluation type. The evaluation type indicates who assigned the rating. When a competency is copied from a profile into a job opening, it is important to respect settings that prevent employees from seeing the ratings associated with specific ratings types. For example, the delivered configuration for competency items does not permit employees to see peer evaluations.

Profile architecture uses the concept of an *Instance Qualifier* to organize content types according to specified data. In the case of competencies, the evaluation type is the instance qualifier. The instance qualifier setup for competencies not only lists the evaluation types, it indicates which ones employees can view (for example, employees can view manager evaluations, but not peer evaluations), and which one is the default value for employees (for competencies, *Self* is the employee default).

Talent Acquisition Manager processes job opening content items with instance qualifiers according to these rules:

• Content items are copied only if the instance qualifier configuration for the source profile's profile type matches the instance qualifier configuration for the primary person profile type.

For example, if the primary person profile type uses the evaluation type as an instance qualifier for competencies, then the system copies competency content items only from profiles that also use the evaluation type as an instance qualifier.

Note. Be sure that the Primary Person Profile Type and any non-person profile types that you use in Recruiting have the exact same instance qualifier setup, including marking the same instance qualifiers as required. If an instance qualifier is required in the Primary Person Profile Type but not in the imported profile type (for example, JOB), then the imported content item might be lacking a qualifier that is required in the job opening, and you will not be able to save the job opening.

• When the system copies content items into a new job opening, it copies only items that are visible to employees.

For example, competency ratings with the evaluation type *Peer* are not copied to the job opening.

• When the system copies content items into a new job opening, it copies only the latest effective-dated content items in the profile are copied.

For example, if an employee enters annual self-evaluations for competencies, the content item representing the most recent self-evaluation is copied into the job opening.

• When a content type is used in screening, the description of the content items shows the instance qualifier.

For example, if the Competencies grid in a job opening includes two rows for analytical thinking, one row for a self-evaluation and one row for a supervisor/manager evaluation, then when you set up screening for the job opening, the list of available screening requirements includes two rows for the analytical thinking competency, one row where the description shows that this is for a Supervisor/Manager proficiency rating, and one where the description shows that it is for a Self proficiency rating.

• When the system loads content items from a job opening into the Candidate Gateway application form (because the Content Section Configuration page is configured to prevent applicants from adding items themselves), it loads only items that are visible to employees.

For example, if a Job Opening has four competencies, and the first two have the evaluation type *Self* and the last two have the evaluation type *Official*, only the first two items appear in the Candidate Gateway online application form.

•

Note. Under the delivered configuration, competency evaluation types and ratings are included when you add a competency to a job opening, but the rating is informational only. That is, the screening process does not check if the applicant has the rating that appears in the job opening. Instead, the screening process awards applicants points based on the applicant's rating and the points scale that you establish in the screening criteria. You can, however, configure the system to screen for a specific rating (for example, to check whether the applicant has a self-evaluation proficiency of *Excellent* for a particular competency).

See Also

Chapter 2, "Defining Installation Options for Recruiting," Defining General Settings for Templates, Approvals, and Integrations, page 11

Limited Profile Integration

Limited profile integration, also known as job profile integration, automatically populates profile data using non-person JOB profiles that are associated with the job code, job family, position, or salary grade for the job opening.

Unlike full profile integration, which is configured at the system level, limited profile integration is configured in recruitment templates. To enable limited profile integration, select a value other than *Not Used* in the Load Requirements from Job Profile field. The options are *Job Code, Job Family, Position,* and *Salary Grade.*

When a user enters the specified type of data as part of the primary job opening information, the system looks for profiles with the default nonperson profile type that are associated with the specific job code, job family, position number, or salary grade. If it finds one or more such profiles, it copies content items from the profiles to the corresponding content type section in the job opening. Content types that are not part of the job opening templates are ignored.

Note. This option provides backwards compatibility with releases prior to PeopleSoft 9.1. Although the system does not prevent you from using this option in addition to full profile integration, Oracle does not recommend this configuration. Full profile integration enables you to pull information from up to three explicitly identified profiles into job openings, and if the system attempts to pull in additional profile data as well, there can be errors if the total number of profiles from both sources exceeds three. Additionally, the automatic use of profiles in addition to the ones that the user explicitly identifies could be confusing to users.

See Also

Chapter 9, "Setting Up Recruiting Templates," Setting Up Recruitment Templates, page 170

Entering Primary Job Opening Information

This section provides an overview of primary job opening information and discusses how to:

- Enter primary job opening information.
- Review profile data and choose a primary profile.

Understanding Primary Job Opening Information

When you create a job opening, you enter the information in two stages. First, you enter basic data on the Primary Job Opening Information page. Data that you enter here determines certain default content for the main job opening page. The data that you enter here also determines the recruitment template for the job opening, which in turn determines the job opening template that controls the structure and layout of the main Job Opening page.

This section discusses the information that you enter on the Primary Job Opening Information page and describes how the system uses this information on the main Job Opening page.

Job Opening Type

When you create a new job opening, you indicate the job opening type on the Primary Job Opening Information page. You cannot change the type after you move on to the Job Opening page.

There are two types of job openings.

A *standard requisition* is an opening for a specific job or position that you want to fill. You must provide specific data regarding the job or position code. Standard requisitions can represent multiple job codes if you've configured the Recruiting Installation - Jobs page to allow this.

A *continuous job opening* is an opening that represents a job for which your organization is always hiring. This type of job opening can be used as a place holder for possible candidates and can potentially remain open for an indefinite amount of time. If your company uses Performance Management, continuous job openings are not used in Time to Fill reporting.

Continuous job openings require only a job posting title. They do *not* require a job code or position number. However, if a continuous job opening doesn't have position or job code data, users will have to specify the position number or job code when making job offers and hiring applicants for the opening.

The specific data requirements depend on your position management settings:

- *Full position management:* A position number is required when making an offer or preparing an applicant for hire.
- *Partial position management:* You can submit a job offer without a position or job code, but you will not be able to prepare the applicant for hire without at least a job code.

Business Unit

You must enter a business unit on the Primary Job Opening Information page. The business unit controls the available values for various business unit-controlled or setID-controlled job opening fields such as position number, job code, location, and recruiting location.

Segmenting Values

Every job opening is associated with a recruitment template that controls the layout and content of various pages that you use during the recruiting process. The overall recruitment template that is associated with a specific job opening references five other templates that control specific pages. For example, the recruitment template references a job opening template, which controls what a recruiter sees on the main Job Opening page, and a resume template, which controls what an applicant sees when applying for that particular job opening online.

When you set up recruitment templates, you can associate them with specific values for the segmenting type that you choose in the Recruiting Installation - General page. For example, if the segmenting type is *Department*, then you can associate different recruitment templates with different departments in your organization. This enables you to vary the layout and content of the job opening pages based on the department.

A field corresponding to the selected segmenting type always appears on the Primary Job Opening Information page, and you are required to enter a value in that field. This enables the system to apply the appropriate recruitment template.

For example, if your job openings are segmented by department, then the Primary Job Opening Information page displays a required Department field. When you create a job opening, you must select a department. If there is a recruitment template associated with that department, then the system uses that template. Otherwise, the job opening uses the system's default template. You identify separate default templates for standard requisitions and for continuous job openings on the Recruiting Installation - General page.

Profile Utilization

If you use full profile integration, the Primary Job Opening Information page displays page elements that you use to select the profiles that the system uses to prepopulate qualifications sections. There is a field for choosing whether to use person profiles (if allowed), non-person profiles, both or neither. Depending on your selection, the page also displays grids for selecting profiles of each type.

Posting Title

You must enter a primary posting title on the Primary Job Opening Information page. The system uses this as the default job posting title when you create the job opening's first job posting. After you have created one or more job postings for the job opening, you set the primary posting title by selecting the posting to use for that purpose.

Page Name	Definition Name	Navigation	Usage
Enter Primary Job Opening Information	HRS_JO_LAUNCH	Recruiting, Create New Job Opening, Enter Primary Job Opening	Enter primary job opening information.
Person Profile	JPM_PROFILE_PERS	Click a View Profile link in the Person Profile grid on the Enter Primary Job Opening Information page.	Preview information for a person profile whose attributes you are bringing into a new job opening, and .
Non-person Profile	JPM_PROFILE1	Click a View Profile link in the Non-person Profile grid on the Enter Primary Job Opening Information page.	Preview information for a non-person profile whose attributes you are bringing into a new job opening.
View Combined Profile Information	HRS_JO_PRFL_PRVW	Enter profiles and then click the Continue button on the Enter Primary Job Opening Information page.	Review the profile characteristics that are being brought into the job opening from the profiles you selected.

Pages Used to Enter Primary Job Opening Information

Entering Primary Job Opening Information

Access the Enter Primary Job Opening Information page (Recruiting, Create New Job Opening, Enter Primary Job Opening).

Create New Job O	pening	
Enter Primary	Job Opening Information	
	and Job Family then add Profile IDs or any other information you require to create a ue once you have entered all required information.	
Opening Information		
Job Opening Type: Business Unit: Job Family: *Profile Utilization:	Standard Requisition GBIBU Global Business Institute BU KFIN Finance Combined Profiles	
Person Profile 🕐	Personalize Find View All 🎑 🛗 First 🚺 1 of 1 🖸 Last	
Empl ID	View Profile	
KU0007	Setty Locherty	
+ Add Person Profile	2 2	
Non-person Profile 3	Personalize Find View All 🖓 🛗 First 🚺 1 of 1 D Last	
Profile ID	View Profile	
100886	Analyst - Financial	
+ Add Non-person	Profile	
Position:	Sr Financial Analyst - 19000070	
Job Code:	Analyst-Financial Sr	
Posting Title:	Sr Financial Analyst	
Continue		-

Enter Primary Job Opening Information page

Job Opening Type	Select whether this is a Standard Requisition or a Continuous Job Opening.
Business Unit	Select the business unit associated with the job opening. The business unit defaults to the business unit of the person creating the job opening.
	The selected business unit controls which values can be entered in many other job opening fields. It does not control values for the profiles that you enter in Person Profiles grid and the Non-Person grid, however it does filter the profile identities (job codes, positions, and so forth) that the system brings from the profiles into the job opening.

Page Elements Based On Segmenting Type

The Enter Primary Job Opening Information page displays a field that corresponds to the value in the Template Segmenting Type field on the Recruiting Installation - General page. Because this page already includes Business Unit and Job Code fields, no additional fields appear when the segmenting type is *Business Unit* or *Job Code*.

For example, if you segment job openings by company, then the Company field appears, and the value you enter determines which recruiting template is used for the job opening. If there isn't a template that is associated with the specific value you enter, the default template for the job opening type (continuous job opening or standard requisition) is used.

The field that corresponds to the segmenting is required, with one exception: continuous job openings do not require a job code even if job code is the segmenting type.

Company	This field appears when the Template Segmenting Type field on the Recruiting Installation - General page is set to <i>Company</i> .
	Select the company associated with the job opening.
Department	This field appears when the Template Segmenting Type field on the Recruiting Installation - General page is set to <i>Department</i> .
	Select the department associated with this job opening.
Job Family	This field appears when the Template Segmenting Type field on the Recruiting Installation - General page is set to <i>Job Family</i> .
	Select the job family associated with this job opening.
Job Profile	This field appears when the Template Segmenting Type field on the Recruiting Installation - General page is set to <i>Job Profile</i> .
	Select the job profile that is associated with this job opening.
	Available profiles include non-person JOB profiles.
	If the recruiting template for the job opening is configured to load job requirements from the profile that you enter, then the qualifications that are associated with the selected profile are added to the job opening when you continue to the main Job Opening page.
	If both profile segmentation and profile utilization are active, the profile that you enter in this field counts toward the limit of three profiles per job opening. Although it is possible to enter the same profile here and in the Non-person Profile grid, doing so is redundant, and the system brings the profile content into the opening only once.
	These fields appear when the Template Segmenting Type field on the Recruiting Installation - General page is set to <i>Salary Grade</i> .
Grade	Select the salary administration plan and salary grade that are associated with this job opening.

This field appears only if you've configured the system to allow profile utilization by setting the Allow Profile Utilization field on the Recruiting Installation - General page to <i>Yes</i> .
Select the types of profiles that you will select in order to bring profile characteristics into this job opening.
The <i>No Profiles</i> and <i>Non-person Profiles</i> options are always available. Additionally, if you've configured the system to allow person profile utilization (the Person Profile Integration field on the Recruiting Installation - General page is set to <i>Yes</i>), then options for <i>Person Profiles</i> and <i>Combined Profiles</i> are also available.
The value you select controls whether the Person Profile and Non-person Profile grids appear on this page. Neither grid appears if you select <i>No Profiles</i> . If either of these grids disappears because you change the value of this field, any data in the grid is cleared and is no longer used for the job opening.

Person Profile

This grid appears only if the Profile Utilization is Person Profiles or Combined Profiles.

Note. You can enter a maximum of three profile IDs on this page using any combination of the Person Profile grid, the Non-person Profile grid, and the segmenting type field. For example, if you segment by job code, and you enter a job code that has a profile, then that profile counts toward the limit of three profiles per job opening. (Similarly, if you segment by Job Profile, the profile that you enter in the segmenting field counts toward the limit. However, this is not a common configuration.)

Empl ID (employee ID)	Enter the employee IDs for the people whose profile data you want to bring into the job opening. Profile security applies: administrators can select any profile, other users can select only their own profile and the profiles of their direct reports.
	See <u>Chapter 3, "Setting Up Profile Integration," Setting Up Profile</u> Integration for Job Openings, page 32.
View Profile	Displays the name of the person whose profile you entered. Click the link to access the Person Profile page so that you can preview the characteristics of the selected profile.
	See <i>PeopleSoft HR 9.1 PeopleBook: Manage Profiles</i> , "Managing Profiles," Creating and Updating Person Profiles.

Non-person Profile

This grid appears only if the Profile Utilization is Non-person Profiles or Combined Profiles.

Note. You can enter a maximum of three profile IDs on this page using any combination of the Person Profile grid, the Non-person Profile grid, and the Job Profile field that appears if you segment your job openings by job profile. Generally, if the Person Profile and Non-person Profile grids appear on this page, the Job Profile field does not. However, it is possible to configure the system so that all three page elements are present.

Profile ID	Enter the profile IDs for the non-person profiles whose data you want to bring into the job opening.
	You can select any type of non-person profile; the primary non person profile type is not relevant to this field.
View Profile	Displays the name of the profile you entered. Click the link to access the Non-person Profile page so that you can review (though not update) the characteristics of the selected profile.
	See <i>PeopleSoft HR 9.1 PeopleBook: Manage Profiles</i> , "Managing Profiles," Creating and Updating Non-Person Profiles.

Additional Page Elements

Position	Optionally select the position number for the job opening. This field appears when Position Management Option on the HRMS Options page is set to <i>Full</i> or <i>Partial</i> .
	When job openings are segmented by business unit, department, job family, or job profile, you must enter a segmenting value before entering a position, as the segmenting value (along with the business unit) controls which positions are available for selection.
	When job openings are segmented by company, job code, or salary grade, you can select a position without first entering a segmenting value.
Job Code	This field appears when the Template Segmenting Type field on the Recruiting Installation - General page is set to <i>Job Code</i> . Regardless of the segmenting type, it also appears when Position Management Option on the HRMS Options page is set to <i>None</i> or <i>Partial</i> .
	Select the job code associated with this job opening.
	For continuous job openings, this field is optional, even if job openings are segmented by job code.
	For standard requisition job openings, this field is required if the Position field is blank. If the Position field contains a value, the system derives the job code from the position number.
Posting Title	Enter an initial primary posting title. You can change this at any point using the Job Postings section on the Job Opening page.
Continue	Click this button to continue creating the job opening.
	If you entered data in the Person Profiles grid or the Non-Person Profiles grid, the system displays the View Combined Profile Information page. Otherwise, you proceed directly to the Job Opening page.

Reviewing Profile Data and Choosing the Primary Profile

Access the View Combined Profile Information page (enter profiles and then click the Continue button on the Enter Primary Job Opening Information page.)

Note. This page appears only if you use full profile integration.

Job Sbe	cification	s for Sta	andard Requisition						
profile, you the Primary	can select the Profile in Prof	e Update Pri ile Managem	y Job Code and/or Position for the J mary Profile checkbox to allow any tent. Change the posting title if req tent of the new Job Opening does	upda uired.	tes to ite View th	ems in the ne profile i	Job Op tems th	ening to flow at will be impo	through orted int
	e Job Openin	g select Cor							
Profile Co	mbination		<u>Customize</u> <u>Find</u> Vie	w Al		First	1-3	of 3 🕨 Last	
Profile ID		Descriptio	on Pri		Primary Profile		Upda Profil	odate Primary ofile	
KU0007		Person - E	Betty Locherty						
100886		Job - Anal	yst - Financial						
19000070		Job - Anal	yst-Financial Sr.						
Profile As	sociations		Cust	omize	<u>Find</u> [[]	<u>a</u> *	First K	1-3 of 3	Last
Profile ID	Description	1	Jobcode		nary Code	Position		Primary Pos	ition
19000070	000070 Analyst-Financial Sr.		140040-Analyst-Financial Sr	2		19000070-Sr Financial Analyst			
100886	Analyst - Financial		140020-Analyst-Business						
100886	86 Analyst - Financial		140035-Analyst-Financial						

View Combined Profile Information page (1 of 3)

Г

Des Gla ID	Customize Find View All 📮 🛗 First 🚺 1 of 1 🗅 Last
Profile ID	Areas of Study
KU0007	Financial Management
 Competencies 	Customize Find View All 🌌 🛗 First 🖾 1-5 of 19 🕨 Last
Profile ID	Competencies
KU0007	Abstract thinking
KU0007	Takes initiative & follows up
KU0007	Resource Planning
KU0007	Provides Direction
KU0007	Managerial Efficiency
✓ Degrees	Customize Find View All 🖓 🛗 First 🗹 1-2 of 2 🖸 Last
Profile ID	Degrees
100886	Bachelor of Science
KU0007	Master of Business Admin

View Combined Profile Information page (2 of 3)

Profile ID	Licenses & Certifications
KU0007	Assoc Chartered Certif Accntnt
▼ Language Skills	Customize Find View All 🖾 🛗 First 🚺 1-2 of 2 🕨 Lasi
Profile ID	Language Skills
KU0007	English
KU0007	Swedish
🕶 Memberships	Customize Find View All 🗖 🛗 First 🗹 1 of 1 본 Last
Profile ID	Memberships
KU0007	Alliance of Gov't Managers
➡ Tests/Examinations	Customize Find View All 🌌 🛗 First 🗖 1-2 of 2 💟 Last
Profile ID	Tests/Examinations
100886	Accounting Aptitude Test
KU0007	Business Mathematics

View Combined Profile Information page (3 of 3)

Profile Combination

This grid lists the profiles whose attributes you are bringing into the job opening. It lists both person and nonperson profiles.

Note. You cannot change your profile selection on this page. To change your profile selection, return to the Primary Job Opening Information page.

Profile ID	Displays the profile ID. When you review specific content items that system copied into the job opening, the profile ID for the content item indicates which profile supplied the data.
Description	Displays the type of profile and the profile name. For example, a person profile description follows the format <i>Person - <person name=""></person></i> .

Primary Profile	You must select one of the profiles as the primary profile for the job opening. Any content items that you add to the job opening are associated with the primary profile, unless there is a profile type configuration incompatibility, in which case the profile ID for the new content item is 0.
Update Primary Profile	If the primary profile is a non-person profile, select this check box if you want to update the profile based on the job opening profile. For example, when you are creating a job opening, the hiring manager might provide updated requirements that you can then transfer back to the job opening's primary non-person profile, maintaining consistency and eliminating redundant work efforts. Copying occurs only when the job opening has an open status.
	The system updates the profile when you save the job opening after adding new content items or after modifying or removing content items that came from the primary profile.
	Note. You cannot update person profiles from the job opening.

Profile Associations

This grid lists the job codes and positions that are associated with the profiles that you are using. If any of the profiles were derived from job code or position data that you entered on the Primary Job Opening Information page, then that job code or position necessarily appears in the grid.

Primary Job Code	Select a primary job codes and position. The system enters the selected job code into the job opening.

Note. Position information appears only under full or partial position management.

Content Types and Content Items

The page displays grids for each profile content type that is valid for the job opening. (Valid profile content types are those that are included in the job opening template.) Each grid lists the specific content items that are to be loaded into the job opening. For example, the Competencies grid lists specific competencies.

Profile IDIdentifies the profile that provided the content type. For example, if you
load Betty Locherty's person profile and the Director of Finance job profile,
the Competencies grid lists both Betty's competencies and the job
competencies; this field lets you know which profile a specific competency
came from.If multiple profiles have the same item (for example, an identical

If multiple profiles have the same item (for example, an identical competency), and one profile has a version with a later effective date, then the system brings that later version and its Profile ID in the grid for that content type.

<content item=""></content>	The second column in each grid displays the name of the specific content item that is to be loaded to the job opening. For example, in the Competencies grid, this column shows the name of the competency.
<items> were not loaded due to Profile Type configuration incompatibility.</items>	This message, with details about the number and type of items, appears when the system is unable to load content items from a profile that you selected. The system can import profile content only when the content type is compatible with the format that is used in the job opening. Specifically, the format that is used in the job opening is the one in the default person profile type for the system.

Entering Basic Job Opening Data

This section discusses how to:

- Enter basic job information.
- Add locations to job openings.
- (USF) Enter candidate name requests.

Page Name	Definition Name	Navigation	Usage
Job Opening	HRS_JOB_OPENING	 Recruiting, Create New Job Opening, Enter Primary Job Opening Information Click the Continue button on the Enter Primary Job Opening page (and, if applicable, on the View Combined Profile Information page). Recruiting, Find Job Openings, Find Job Openings, Find Job Openings Click a job opening to access the Job Opening Details tab. Recruiting, Browse Job Openings Click a job opening to access the Job Openings, Browse Job Openings, Browse Job Openings 	Enter job opening details.
Locations	HRS_JO_LOC_SEC	Click the Add Additional Locations link on the Job Opening page.	Add locations to job openings.
Candidate Name Requests	HRS_JO_NM_SEC	Click the Candidate Name Request link on the Job Opening page.	(USF) Enter candidate name requests.

Entering Basic Job Information

Access the Job Opening page (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the View Combined Profile Information page).

Access the Opening Information section.

Create New Job Opening			
Job Opening			
Posting Title: Job Opening Status: Job Title: Position Number: Business Unit: Job Family:	File Clerk 005 Draft File Clerk NF000051 File Clerk NFSBU Federal Recruiting Solut NF2000 RS Fed Clerical job fam		NF0035
Save and Open Save	as Draft Cancel	Previous Step	Next Step
Job Details Qualific	cations Screening Job Post	ings Hiring Team	
*Template ID:	1000 🤍 Requisition D)efault	
Job Opening Type:	Standard Requisition		
Created By:	KU0007 Getty Lochert	у	
Created:	06/12/2009		
*Openings to Fill:	Limited 💌		
Target Openings:	1		
Available Openings:	1		
Establishment ID:			
Business Unit:	NFSBU 🔍 Federal Rec	ruiting Solutions	
Position Number:	NF000051 🧠 File Clerk		
Job Code:	NF0035 File Clerk		

Job Opening page: Opening Information Section (1 of 3)

Company:	NF Stional Science Foundation
Department:	NF002 Corporate
Location:	
Recruiting Location:	
······	Add Additional Locations
Status Code:	005 Draft
Status Reason:	
*Status Date:	06/12/2009
Desired Start Date:	31
Encumbrance Date:	
Projected Fill Date:	31
Date Authorized:	31
Referral Program ID:	
*Recruitment Type:	
*Area of Consideration:	
Recruitment Contact:	
Draft Status:	
Country:	USA Quited States
Citizenship Status:	
Minimum Age:	
Maximum Age:	
Gender:	
	Candidate Name Requests

Job Opening page: Opening Information Section (2 of 3)

Priority Placement Considerations	Customize Find 🗖 🛗 First 🚺 1 of 1 D Last
*Program	
+ Add Priority Placement Programs	
Employees Being Replaced	Customize Find 🖾 🛗 First 🗹 1 of 1 🕨 Last
Name	Empl ID
	<u></u>
Add Employees Being Replaced	

Job Opening page: Opening Information Section (3 of 3)

Note. Certain fields in these sections appear only in U.S. federal installations.

See Chapter 9, "Setting Up Recruiting Templates," page 131.

Save Processing for New Job Openings

The available save options depend on whether approvals are required:

Save as Draft	Click to save the job opening and set the job opening status to <i>Draft</i> . This button is available regardless of whether approval is required.
Save and Open	Click this button to save the job opening and set the job opening status to <i>Open</i> . This button is available only if no approval is required.
Save and Submit	Click this button to save the job opening and set the job opening status to <i>Pending Approval</i> . This action also sends a notification to the approver.
	This button is available only if approvals are required.

Opening Information

Template ID	Select a recruitment template to associate with the job opening.
	The system determines the default value for this field based on the Template Segmenting Type entered on the Recruiting Installation - General page, the Segmentation Values entered on the Recruitment Template - Segmentation Values page, and the job data that you enter.
	This field is visible only to users with administrator privileges.
	See <u>Chapter 2, "Defining Installation Options for Recruiting," Setting Up</u> <u>Recruiting Installation Settings, page 10.</u>
	See <u>Chapter 9, "Setting Up Recruiting Templates," Assigning Segmentation</u> <u>Values to Recruitment Templates, page 175.</u>
Job Opening Type	Displays the type of job opening selected on the Enter Primary Job Opening Information page: <i>Standard Requisition</i> or <i>Continuous Job Opening</i> .
Created By	Enter the employee ID for the person you want assigned to the creator role for this job opening.
	The value defaults to the ID of the user that initiated the creation of the job opening.
Created	Enter the date on which the job opening was created. The default date is today's date.

Openings to Fill	Specify whether the openings are:
	• <i>Limited:</i> Enables the Target Openings and Available Openings fields to appear. The system closes the job opening when all openings are filled.
	• <i>Unlimited:</i> Hides the Target Openings and Available Openings fields and the job opening stays open until it is manually closed.
Target Openings	Enter the number of positions that are to be filled. This field appears only if you select <i>Limited</i> in the Openings to Fill field.
Available Openings	This field displays the number of available openings only if <i>Limited</i> was selected in the Openings to Fill field. The initial number of openings is the value entered in the Target Openings field. When you hire an applicant in this job opening, the system decreases this number by one. When all available positions are filled, the status of the job opening is set to <i>Closed</i> .
	The total <i>Available Openings</i> is always less than or equal to the <i>Target Openings</i> .
Establishment ID	Select the Establishment ID for this job opening.
	The value defaults to the establishment ID assigned to the job code or position ID.
Business Unit	Select a business unit. The default value is the value that you entered on the Enter Primary Job Opening Information page.
Position Number	Select a position number. This field defaults to the value, if any, entered on the Enter Primary Job Opening Information page.
	When you enter a position, the system brings position data (such as job code, company, department, location, and regulatory region) into the job opening. You can override this data within the job opening, but any overrides that you enter are not brought into the job data record that is created during the hire process. This is because the job data record gets its default data from the position rather than from the job opening.
	Note. This field is available when the system allows only one position number in a job opening (that is, if Allow multiple jobs/positions is not selected on the Recruiting Installation - Jobs page) .If the Recruiting Installation - Jobs page is configured to allow multiple jobs or positions in a job opening, this field is replaced by a Positions grid that appears farther down on the page

Job Code	Select a job code. The default value is the value, if any, that you entered or the Enter Primary Job Opening Information page. This field is available when the system allows only one job code in a job opening (that is, if Allow Multiple Jobs/Positions is not selected on the Recruiting Installation - Jobs page).	
	Note. If the Recruiting Installation - Jobs page is configured to allow multiple jobs or positions in a job opening, this field does not appear. Instead, a job code scroll area appears for those job opening sections where each job code has its own settings.	
Company	Select a company. The default value is the value, if any, that you entered on the Enter Primary Job Opening Information page.	
Department	Select a department. The default value is the value, if any, that you entered on the Enter Primary Job Opening Information page.	
Location	Select a location code for the physical location of this job opening.	
Recruiting Location	Select a recruiting location for the job opening.	
	When applicants use Candidate Gateway to search for job openings, geographical searches look for job openings based on their recruiting locations, not their physical location as specified in the Location field. For example, the physical location might be a specific city, while the recruiting location used for searches might be a broader area or region.	
	When you set up recruiting locations, you associate them with physical locations. In Candidate Gateway, the recruiting location and its associated physical location control whether an applicant is asked to provide USA-specific self-identification details (gender and ethnicity) during the application process.	
	These self-identification fields appear when any of a job opening's recruiting locations are associated with a physical location in the USA, and also when a job opening does not include any recruiting locations. The self-identifications fields do not appear when a recruiting location exists but doesn't reference any physical locations.	
	The Location field on the job opening is <i>not</i> used in determining whether to display the self-identification fields in Candidate Gateway.	
	See <u>Chapter 8, "Setting Up Additional Recruiting Definitions,"</u> Understanding Recruiting Locations, page 105.	
Add Additional Locations	Click to access the Job Opening - Locations page, where you can enter additional locations and recruiting locations.	
	See <u>Chapter 13, "Creating Job Openings," Adding Locations to Job</u> <u>Openings, page 263.</u>	

Status Code	Displays the current job opening status. In general, the system sets the value of this field as the job opening moves through the recruiting process and, if approvals are active, through the approval process.
	Recruiting administrators are the only users who can make direct edits to the job opening status. For all other users, the field is read-only.
	Users who have access to a job opening can update the status indirectly from either the Find Job Openings or Browse Job Openings pages. On these pages, the Select Action field provides actions that let users close a job opening, cancel it, or put it on hold.
	See <u>Chapter 4, "Setting Up Recruiting Statuses," Understanding Recruiting</u> <u>Statuses, page 35.</u>
Status Reason	Select a status reason code that is associated with the current status.
	When a recruiting administrator changes the Status Code field or updates the status by overriding the approval process, , the system clears the Status Reason.
	When the system changes a job opening's status code, the presence of identical reason codes causes the system to bring in a default reason code for the new status. For example, suppose the Draft and Pending statuses both have a reason code 100. The descriptions might be different, but the code itself is the same for both. If a job opening in Draft status has reason code 100, then when it goes into Pending status, the system assigns the Pending reason code 100. If the Pending status doesn't have a reason code 100, then when the job opening goes into Pending status, the Reason Code field will display <i>Invalid Value</i> .
Status Date	Enter the date on which the status went into effect. The default date is the current date.
Desired Started Date	Enter the date that the job begins.
	This field can be used as a parameter for screening applicants.
Encumbrance Date (encumbrance date)	If your organization uses the Commitment Accounting business process in PeopleSoft Human Resources, indicate how the system budgets for the unfilled position. Select one of these options:
	• <i>Authorization Date:</i> Start budgeting for the position from the date that it is authorized, as indicated in the Date Authorized field.
	• <i>Project Fill Date:</i> Start budgeting for the position from the date that you expect to fill the position as indicated in Projected Fill Date field.
	If you're not using commitment accounting, leave this field blank.
Projected Fill Date	If you selected <i>Project Fill Date</i> in the Encumbrance Date Indicator field, enter the date that you expect to fill the job opening.

Date Authorized	The date that the job opening was approved. If approvals are being used, this date is the date the job opening reaches final approval.	
	When you create a job posting, you can set the posting date relative to this date.	
Referral Program ID	Select an employee referral program. If there is an employee referral program associated with the recruitment template, that employee referral program appears here.	
Recruitment Contact	Select a recruitment contact. Recruitment contacts are defined on the Recruitment Contacts page and must have a recruitment type of <i>Office</i> .	
(USF) Opening Information: U.S. Federal Page Elements		
(USF) Recruitment Type	Defines whether the job opening is:	

(USF) Recruitment Type	Defines whether the job opening is:	
	• <i>Internal</i> - only current federal employees.	
	• <i>Merit Promotion</i> - current and previous federal employees.	
	• Open Competition - internal and external applicants.	
	The system uses the recruitment type to determine what type of priority to give to applicants with priority placement codes.	
	See <u>Chapter 5, "Setting Up Screening Processes," Understanding Priority</u> <u>Placement Processing, page 83.</u>	
(USF) Area of Consideration	Defines where the job opening is to be available:	
	• Agency	
	External Government	
	• Federal Government	
	• Nationwide	
	• Subagency	
	• Worldwide	
(USF) Draft Status	Select the applicant's draft status:	
	Not Applicable	
	• Not Yet Registered	
	• Registered	
(USF) Country	Select the country in which the job opening is to be filled.	

(USF) Citizenship Status	Select the applicant citizenship status. Select from the following options:		
	Alien Permanent		
	Alien Temporary		
	Canadian Citizen		
	• Employment Visa		
	• Native		
	• Naturalized		
	Not Indicated		
	• Other		
	Permanent Resident		
	This field can be used as a parameter for screening applicants.		
(USF) Minimum Age	Enter the minimum age restriction that might apply to this job opening. This field can be used as a parameter for screening applicants.		
(USF) Maximum Age	Enter the maximum age restriction that might apply to this job opening.		
	This field can be used as a parameter for screening applicants.		
(USF) Gender	Enter any gender restriction that might apply to this job opening.		
	This field can be used as a parameter for screening applicants.		
(USF) Candidate Name Requests	Click to access the Candidate Name Requests page, where you can enter candidates that you highly recommend for the job opening. This information can be used in resolving ties when screening applicants.		

(USF) Priority Placement Considerations

Program	Select a priority placement program to associate with this job opening.
	The Priority Placement process uses this information, along with salary grade and level for the job opening, to identify any applicants that have an entitlement to priority placement consideration.
Add Priority Placement Programs	Click to add another row to the Priority Placement Considerations grid.

Employees Being Replaced

Add Employees Being	Click to add another row to the Employees Being Replaced grid.
Replaced	

Positions

This grid appears only if the Recruiting Installation - Jobs page is configured to allow multiple jobs or positions in a job opening. If this grid appears, there is no Position Number field in the Opening Information group box.

Descr (description)	Identify a position that is associated with this job opening.
Primary Position	Select this check box to identify the primary position when there are multiple job positions associated with a job opening. You must identify one and only one primary position.
	When you enter a position, the system brings position data (such as job code, company, department, location, and regulatory region) into the job opening. You can override this data within the job opening, but any overrides that you enter are not brought into the job data record that is created during the hire process. This is because the job data record gets its default data from the position rather than from the job opening.

Works Council Information

Use this group box to select a works council ID. This group box only appears on the page if the Works Council Information section is included on the associated job opening template.

Works Council ID	Select a works council ID. Only works council IDs with the same setID as the user appear as values.
	See <i>PeopleSoft HR 9.1 PeopleBook: Manage Labor Administration</i> , "Setting Up Works Councils."

Adding Locations to Job Openings

Access the Job Opening - Locations page (click the Add Additional Locations link on the Job Opening page).

Job Opening				
Locations				
Locations	<u>Custor</u>	<u>mize Find</u> 🗖 🛗	First 🚺 1 of 1 🚺 l	ast
*Location		Primary Location		
Swish Fnd. North Cal Fed Rec	Q			Î
+ Add Locations				
Recruiting Locations	<u>Customiz</u>	<u>ze Find 🗖 🛗</u> Fir	rst 🚺 1-2 of 2 🚺 I	.ast
*Location	Primary Recr	ruiting Area	Target Openings	
Swish Fnd. North Cal Fed Rec			1	Î
Swish Found. Rec Sol West Reg			1	Î
Add Recruiting Locations				
Save Cancel				

Job Opening - Locations page

Locations

Location	Select an HR location that identifies where the job opening is physically located.
Primary Location	If there is more the one location associated with the job opening, indicate which location is primary.
Add Locations	Click to add another row to the Locations grid.
Recruiting Locations	
Location	Select the recruiting location that appear to applicants when they search for a job.
Primary Recruiting Area	If there is more the one recruiting location associated with the job opening, indicate which recruiting location is primary.
Target Openings	Enter the number of target openings for each recruiting location.
Add Recruiting Locations	Click to add another row to the Recruiting Locations grid.

(USF) Entering Candidate Name Requests

Access the Candidate Name Requests page (click the Candidate Name Request link on the Job Opening page).

Candidate Name Requests	Customize Find 🗖 🛗	First K 1 of 1 L	ast
*Name			
		9	Î
+ Add Candidate Names			
OK Cancel			

Candidate Name Requests page

Name

Select the name of a person who you would like to target for this position. This field can be used as a tie breaker in screening.

Working With Multiple Job Codes in a Job Opening

Job openings can have multiple job codes if you use the Recruiting Installation - Jobs page to enable this capability.

This section provides an overview of copying qualifications to non-primary job codes and discusses how to:

- Add additional job codes to a job opening.
- Copy job qualifications to non-primary job codes.

Understanding Copying Qualifications To Non-Primary Job Codes

To expedite data entry in job openings with multiple job codes, the system enables you to copy job qualifications from the primary job code to all other job codes.

The Copy Process

Copy functionality is available for both standard requisitions and continuous job openings.

The copy process copies data to existing non-primary job codes. Any data that already exists for the non-primary job codes is not affected.

For example, if the primary job code includes competencies A, B, and C, and a non-primary job code includes competency X, then after the copy process, the non-primary job code will have four competencies: A, B, C, and X.

If you add additional job codes after copying, the system automatically copies the primary job code qualifications to the newly added job code. In this situation, the system copies the primary job code qualifications as they are at the time the new job code is created, which may be different than the qualifications that were copied at the time of the original copying process.

Copyable Data

The data that is copied includes:

- Work Experience and Education.
- Screening Questions.

The copy process copies the answers (for multiple-choice questions) and evaluators (for open-ended questions) along with the questions themselves.

• Content items from profile-based qualifications.

Examples of profile-based qualifications include competencies, degrees, and languages.

Note. There are other data sections (staffing information, salary information, and screening information) that have separate rows for each job code in the job opening, but the copy process does *not* copy data in these sections, and the Copy Qualifications from Primary Job Code button does not appear unless the page shows copyable sections as well.

Adding Additional Job Codes to a Job Opening

Access the Job Opening page (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the View Combined Profile Information page).

If Allow Multiple Jobs/Positions is selected on the Recruiting Installation - Jobs page, a job code scroll area appears for those job opening sections where each job code has its own settings.

Additional Job Specifica	ations	Find View All First 🚺 1 of 1 🚺 Last
Job Code:	170005 🔍	Primary Job Code
Staffing Information		
Region:	USA	
Schedule Type:	Full-Time	
Regular/Temporary:	Regular	•

Scroll area for multiple job codes

These additional page elements appear when multiple job or positions are enabled.

Job Code	When you first create a job opening, the job code (if any) that you entered on the Enter Primary Job Opening Information page appears in this field by default. As you create additional rows for additional job codes, use this field to enter the job codes.
	When a job opening has multiple job codes, each job code has its own staffing information, salary information, qualifications, and screening configuration.
	Job postings in Candidate Gateway show only the posting information for the primary job code; applicants cannot tell that there are additional job codes in the job opening.
Primary Job Code	Select this check box to identify the primary job code when there are multiple job codes associated with a job opening. You must identify one and only one primary job code.
Add Job Codes	Click to add another job code to the job opening.
Delete Job Code	Click to delete a job code from the job opening.

Copying Job Qualifications to Non-Primary Job Codes

Access the Job Opening page (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the View Combined Profile Information page).

Access a section that includes copyable qualifications.

Tests/Examinations		Find \	view All 🗖 🏪	First 🚺 1-3 of 3	🕨 Last
ofile ID	Tests/Examinations				
0888	Mechanical Concepts Tes	ţ			Î
0885	General Secretarial Skills		Î		
00885	General Clerical Skills		Î		
om Question Sets hyperl	Questions hyperlink to add one link to add a question set contai	ning on	e or more questio	ns to the Job Openin	g.
-	question from the prompt or ch To delete a question, select the	_			
question from the prompt. Screening Questions		_			
question from the prompt. Screening Questions Question		_	e icon against the Question	question you wish to	
question from the prompt. Screening Questions Question Confidential Mail	To delete a question, select the	delete	Question Order	question you wish to Action	delete.
question from the prompt. Screening Questions Question Confidential Mail Employee Input and De	To delete a question, select the		Question Order	question you wish to Action <u>View Answers</u>	delete.
question from the prompt. Screening Questions Question Confidential Mail Employee Input and De ssue Resolution	To delete a question, select the	delete	Question Order 1 2	Action View Answers View Answers	delete.
-	To delete a question, select the	delete	Question Order 1 2 3	Action View Answers View Answers View Answers	delete.

The Copy Qualifications from Primary Job Code button appears only if there are copyable sections on the page

Copy Qualifications from Primary Job Code	Click this button to copy job opening qualifications from the primary job code to all other job codes. Copied information includes work experience and education, screening questions, and any profile-based qualifications.
	The copied information is added to any existing data in the other job codes—it does not overwrite or delete anything.
	This button appears only on page sections that include copyable data. If there is only one job code in the job opening, the button is visible but not active.

Adding Staffing and Salary Information

This section discusses how to:

- Enter staffing information.
- Enter salary information.

Page Used to Add Salary and Staffing Information

Page Name	Definition Name	Navigation	Usage
Job Opening	HRS_JOB_OPENING	 Recruiting, Create New Job Opening Click the Continue button on the Enter Primary Job Opening page and, if necessary, on the View Combined Profile Information page. Recruiting, Find Job Openings Click the link for a job opening in the search results, then click the Job Details tab. Click the link that corresponds to the type of job opening data you want to access. 	Enter job opening data, including salary and staffing information.

Entering Staffing Information

Access the Job Opening page (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the Reviewing Profile Data page).

Locate the Staffing Information section.

Staffing Information	
Region:	USA
Schedule Type:	Full-Time
Regular/Temporary:	Regular
Not To Exceed Date:	1
Not-to-Exceed Days:	
Summer Appointment:	
Shift:	Not Applicable
Hours:	40.00
Work Period:	Weekly
Travel Percentage:	None
Supervisor Level:	
FLSA Status:	
LEO/Fire Position:	
Sensitivity Code:	
Type of Appointment:	

Job Opening page: Staffing Information Section

Staffing Information

Region	Select the region in which the job opening is located. Regions are defined on the Regulatory Region page.
	See PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Working with Regulatory Regions."
Schedule Type	Select whether this a Full-time or Part-Time position.
	This field can be used as a parameter for screening applicants.
Regular/Temporary	Select whether this is a Regular or Temporary position.
	This field can be used as a parameter for screening applicants.
Begin Date	Enter the date on which the job is to begin.
End Date	Enter the date on which the job is scheduled to end. This field is for temporary job openings.
(USF) Not To Exceed Date	If this is a temporary position, enter the date on which it will end.
(USF) Not To Exceed Days	If this is a temporary position, enter the maximum number of days after the Not To Exceed Date by which the job can extend.

(USF) Summer Appointment	Select this check box if this position is a summer appointment. This information is sent as part of the vacancy information for the USA Jobs program. When there are multiple job codes, the primary job code value for summer appointment is used.
Shift	Select the shift for this job opening.
	This field can be used as a parameter for screening applicants.
Hours	Enter the default number of hours in a normal workweek for this job. The field defaults to the number associated with the job code.
	This field can be used as a parameter for screening applicants. It is compared to the Desired Hours Per Week field on the Application Details page.
Work Period	Select the time period in which employees must complete the standard hours. These values are created by using the Frequency table.
Travel Percentage	Enter the percent of travel required by this job.
	This field can be used as a parameter for screening applicants. It is compared to the Travel Percentage field on the Application Details page.
(USF) Supervisor Level	Enter the supervisor level. The default value is the level assigned on the job code.
(USF) FLSA Status (fair labor standards act status)	Displays the FLSA status associated with the job code.
(USF) LEO/Fire Position (law enforcement officer/fire position)	Displays the LEO/Fire position code associated with the job code.
(USF) Sensitivity Code	Select a sensitivity code. The default value is the value assigned to the job code.
(USF) Type of Appointment	Select the type of administrative post.

Entering Salary Information

Access the Job Opening page (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the Reviewing Profile Data page).

Locate the Salary Information section.

Salary Information					
Pay Plan:	GS				
From Grade:	03	<u> </u>			
From Step:		Q			
To Grade:		<u> </u>			
To Step:		<u> </u>			
Salary Range From:		21,517.000000	(Default From Job C	ode)	
Salary Range To:		27,970.000000	(Default From Job C	ode)	
Pay Frequency:	Year		-		
Currency:	US Dollar		•		
Occupational Series:	0305 Mail :	and file			
PATCOB Code:	Clerical				
Job Details Qualif	ications	Screening	Job Postings	Hiring Team	
Save and Open Save a	s Draft Ca	ancel	Previous	Step <u>Next Step</u>	

Job Opening page: Salary Information Section

Salary Information

Salary Admin Plan	Displays the salary plan associated with the position. You can change the salary plan by selecting another from the list of available options.
(USF) Pay Plan	Displays the pay plan associated with the position. You can change the pay plan by selecting another from the list of available options.
From Grade	The pay grade for the job opening, or, if there is a range of pay grades, the low end of the range. The default value is the pay grade that is associated with the position.
From Step	The step for the job opening, or, if there is a range of steps, the low end of the range. The default value is the step that is associated with the position.
To Grade	If the job opening has a range of pay grades, enter the high grade.
To Step	If the job opening has a range of steps, enter the high step.
Salary Range From	The system supplies the salary range from the Job Code table. You can override these values.

Salary Range To	The system supplies the salary range from the Job Code table. You can override these values.
Pay Frequency	Select the pay frequency in which this job is paid.
Currency	Select the currency in which this job is paid.
(USF) Occupational Series	Displays the occupational series that is associated with this occupational series for this position.
	Displays the PATCOB code that is associated with occupational series for this position. These codes are occupational categories established by the U.S. Equal Employment Opportunity Commission.
Collar code)	PATCOB Code is not a search field for job openings. If you want applicants to be able to search for job openings based on the PATCOB code, you can set up your job families (which are searchable in PeopleSoft Candidate Gateway) to match the PATCOB codes.

Adding Job Qualifications

This section discuses how to:

- Review profile usage.
- Define education and work experience requirements.
- Define profile-based job qualifications.
- Add details for profile content items.

Page Name	Definition Name	Navigation	Usage
Job Opening	HRS_JOB_OPENING	 Recruiting, Create New Job Opening Click the Continue button on the Enter Primary Job Opening page and, if necessary, on the View Combined Profile Information page. Recruiting, Find Job Openings Click the link for a job opening in the search results, then click the Job Details tab. Click the link that corresponds to the type of job opening data you want to access. 	Enter job opening data, including job qualifications such as education and experience, screening questions, and qualifications that have been configured as profile content types.
Add <profile type=""></profile>	HRS_PROF_DETAIL	Click the Add <qualification type=""> link that is associated with a qualification content type.</qualification>	Enter detailed information about the qualification. The specific page elements that appear depend on the content type.

Pages Used to Define Job Qualifications

Reviewing Profile Usage

Access the Job Opening page (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the Reviewing Profile Data page).

Note. The template for the job opening controls whether this section appears and, if so, where it appears. This section is only available for inclusion in the job opening template if the system is configured for full profile integration.

Select Add a Profile to add a row to the Profile Combination grid. Select a profile type for the profile you wish to add then choose a Profile ID from the prompt. Once you have selected a profile, items associated to the profile will be imported into the Job Opening. The Update Primary Profile checkbox will be editable for Non-person profiles only. To delete a profile and all items associated to it from the Job Opening, select the delete icon next to the profile you wish to delete.					
Profile Combinati	on	Customize Find	View All 🗖 🛗	First 🚺 1-2 of 2 🚺	Last
*Profile Type	Profile ID	Description	Primary Profile	Update Primary Profile	
Person Profi	KU0007	Betty Locherty		Γ	Î
Non-person 💌	100886	<u> Analyst - Financial</u>			Î
+ Add a Profile	2				

Job Opening page: Profile Combination Section

This section displays the profiles whose content items were copied into the job opening. If you remove a profile from this grid, the system removes all items related to that Profile ID from the job opening. If you add an additional profile, the system copies the additional items from that profile into the job opening.

The Description column includes a link that you click to access the profile details; the link is disabled for person profiles when you do not have security access to view that person's profile.

Note. Approvers cannot modify profile data for a job opening. Approvers can change, add, or delete individual content items as necessary, but they may not change, add, or delete profile IDs.

Defining Education and Work Experience Requirements.

Access the Job Opening page (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the Reviewing Profile Data page).

Note. The template for the job opening controls whether this section appears and, if so, where it appears.

Indicate the education level and work experience, if any, that are required for this Job Opening. To add Work Experience and Education select the Add Work Experience and Education link.			
Work Experience & Education	Customize Find 🗖 🛗 First 🗖 1-2 of 2 🗖 Last		
*Highest Education Level	Years of Work Experience		
Bachelor's Degree	4.0		
Master's Degree	2.0		
+ Add Work Experience and Education			

Job Opening page: Work Experience and Education section

Work Experience & Education

Use this grid to set up a matrix showing how many years of experience are required for applicants with different education levels.

Highest Education Level	Select an education level so that you can then enter the amount of experience required by applicants who have selected the same value as their highest level of education.
	Education levels are defined on the Education Level Achieved Table page.
	Note. When you use Education & Experience requirements as screening criteria, applicants with a higher education level than the one you selected are <i>not</i> considered to have met the requirement. To prevent the system from penalizing applicants with more education than you require, create additional rows for every degree above the minimum requirement.
Years of Work Experience	Enter the years of work experience required for this job opening. Leave this field blank to indicate that there are no experience requirements for applicants who have attained the given education level.
	Note. When the screening process evaluates whether an applicant meets particular education & experience requirements, it fails applications where there are no work experience entries with start dates, even if there are zero years of work experience required.
Add Work Experience & Education	Click to add another row to the Work Experience & Education grid.

Defining Profile-Based Job Qualifications

Access the Job Opening page (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the Reviewing Profile Data page).

Note. The template for the job opening controls which profile-based section appear on the Job Opening page and where they appear.

There are no items for the Areas of Study section. Please add one if required. • Add Areas of Study To add Competencies, select the Add Competencies hyperlink below. To change information for Competencies, select the hyperlink under the Competencies field. Select the delete icon to remove					
Competenc Competer	ies information. encies	Find	View All 🗖 🛗 Firs	+ 🚺 4 5 of 7 🕨	Last
Profile ID	Competencies	Evaluation Type	Proficiency	1-3017	
KU0026	<u>Ability to prioritize</u> t <u>asks</u>	Approved/Official	3-Good	•	Î
KU0026	Organize people and goal tasks	Approved/Official	3-Good	•	Î
KU0026	Resource Planning	Approved/Official	3-Good	•	Î
KU0026	Persuasive	Approved/Official	3-Good	•	Î
KU0026	Business Planning	Approved/Official	3-Good	•	Î
Add Competencies To add Degrees to the Job Opening, select the Add Degrees hyperlink below. ✓ Degrees Eind View All □ ■ First 1 of 1 □ Last					
Profile ID	De	grees			
0	Ba	chelor of Arts			Î

Job Opening page: profile-related sections

<Profile Content Type>

The Job Opening page includes a separate grid for each profile content type in the associated job opening template.

Note. The exact configuration of these grids depends on the settings on the Content Section configuration page.

See Chapter 3, "Setting Up Profile Integration," page 25.

Profile ID	Identifies the profile that provided the content type. For example, if you load Betty Locherty's person profile and the Director of Finance job profile, the Competencies grid can list both Betty's competencies and the job competencies; this field lets you know which profile a specific competency came from.
	Note. For person profiles, this field is blank if you do not have security access to see the person's profile data.
	If multiple profiles have the same item (for example, an identical competency), and one profile has a version with a later effective date, then the system brings that later version and its Profile ID in the grid for that content type.
	If multiple profiles use the latest effective-dated row for the duplicate item, the system populates the Profile ID field with the ID of one of the profiles, though not necessarily the primary profile for the job opening.
	Any content items that you add to the job opening are associated with the primary profile, unless there is a profile type configuration incompatibility, in which case the profile ID for the new content item is <i>0</i> .
<content item="" name=""></content>	Displays the name of the specific content item. For example, in the Competencies grid, this column (labeled <i>Competencies</i>) displays names of specific competencies such as <i>Analytical Thinking</i> or <i>Ability to Prioritize Tasks</i> .
	To modify information about a content item that you have already added to the grid, click the content item name to access the corresponding detail page.
<additional column="" names=""></additional>	The columns that appear in each grid depend on the settings in the Content Section Configuration page for the content type. Specifically, fields for which you select the Summary check box on the Content Section Configuration page appear as grid columns.
Add <content item=""></content>	Click this link to access the content item detail page, where you enter specific content items (such as <i>Analytical Thinking</i> . The fields on the detail page depend on the content type definition within the Manage Profiles business process.
	Save the data on the detail page to add the content item to the grid.

Proficiency Ratings

When content types such as competencies are associated with ratings scales, the content type grid displays a rating. This data is informational only.

When you screen applicants based on competency ratings, the system does not evaluate whether the employee has received the specified rating. Instead, the screening process awards points based on the rating scale that you set up when you define your screening criteria.

Adding Content Item Details

Access the Add <Profile Type> page (click the Add link that is associated with a qualification content type) or the Update <Profile Type> page (click a content item in any content type grid on the Job Opening page)

Add Compete	encies
Details	Find View All First 🗹 8 of 8 🕨 Last
Profile ID of the new Con *Competency: *Evaluation Type: *Rating Model: *Proficiency:	mpetencies item will be set to zero due to Profile Type Configuration Incompatibility
ОК	Cancel Apply and Add Another

Add Competencies page

Note. The page name and the fields on the page vary depending on the content type.

Details

The Details group box is a scroll area than you can use to view details for all content items (for the specified content type) that have already been added to the job opening. When you access this page using the Add <Content Type> link, the system displays a new blank row of for you to complete.

ОК	Click to save changes to all rows and return to the Job Opening page.
Cancel	Click to return to the Job Opening page without saving any changes to the current row.
Apply and Add Another	Click to save all changes to all rows and add another blank row to the Details scroll area.

Adding Screening Questions to a Job Opening

This section discuses how to:

- Add screening questions to a job opening.
- View answers to multiple-choice screening questions.
- Assign evaluators to open-ended screening questions.

• Load screening questions from question sets.

Pages Used to Add Screening Questions to a Job Opening

Page Name	Definition Name	Navigation	Usage
Job Opening page: Screening Questions section	HRS_JOB_OPENING	 Recruiting, Create New Job Opening Click the Continue button on the Enter Primary Job Opening page and, if necessary, on the View Combined Profile Information page. Recruiting, Find Job Openings Click the link for a job opening in the search results, then click the Job Details tab. 	Enter screening questions for a job opening.
Answers to Screening Questions	HRS_JO_ANSWER_SEC	Click the View Answers link for a multiple-choice screening question in the Screening Questions section of the Job Opening page.	Review the correct and incorrect answers to a multiple-choice screening question, and review the points that are awarded for each answer.
Assign Evaluators	HRS_OE_EVAL_SEC	Click the Enter Evaluators link for an open-ended screening question in the Screening Questions section of the Job Opening page.	Review the full text of an open-ended question, and assign evaluators who will give scores to applicants' answers to that question.
Select Question Sets	HRS_QSET_ADD_SEC	Click the Load from Question Sets link in the Screening Questions section of the Job Opening page.	Choose a question set so that the system can add all included questions to the job.

Adding Screening Questions to a Job Opening

Access the Job Opening page: Screening Questions section (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the Reviewing Profile Data page).

Note. The template for the job opening controls whether this section appears and, if so, where it appears.

Select the Add Screening Questions hyperlink to add from Question Sets hyperlink to add a question set c Alternatively select a new question from the prompt question from the prompt. To delete a question, sele Screening Questions	ontaining or chang) one or more que je an existing que	estions to the Job Opening. estion by selecting a diferent	
*Question		Question Order	Action	
21 Yrs		1	View Answers	Î
Eligible to possess a firearm?		2	View Answers	Î
Overtime	_	3	View Answers	Î
disclose pre-background check			Enter Evaluators	Î
+ Add Screening Questions Load from Question Sets				

Job Opening page: Screening Questions section

Default Screening Questions from the Job Opening Template

If there is a default question set in the job opening template, the system adds those questions to the Screening Questions grid when you first create the job opening. If you change the template association, the questions are not removed, though additional questions may be added.

The system continues to reload questions from the job opening template until the job opening is in Open status. The means that any manually deleted questions are added back while the job opening is in Draft or Pending status. Also, if new questions are associated with the job opening template, the system adds those to the job opening too. (Other template changes, however, do not carry over to existing job openings.)

After the job opening goes into Open status, the system no longer refreshes the question list.

Default Screening Questions from the Resume Opening Template

If there are prescreening questions in the resume template for the job opening, the system adds those questions to the Screening Questions grid when you first create the job opening. These questions, unlike the questions from the job opening template, do not normally get reloaded after the initial job creation, regardless of the job opening status. However, if you change the template association, additional questions may be added.

Screening Questions

Question	Select a screening question. Screening questions are defined on the Question Definition page.
	Questions that you enter here are available to be used by any of the screening levels that you run for this job opening (except that you can't use open-ended questions for prescreening or online screening). Applicant's answers are collected during the online application process in Candidate Gateway.

Question Order	Enter numbers to control the order that the questions appear in the online application. If you load questions from a question set that specified order numbers, then those order numbers are the default values in the job opening. Review any default values carefully. Default values might not be unique, depending on the order numbers that were assigned in the question set definitions, and it is up to you to specify an unambiguous question order. Because this field accepts only integers, consider using non-consecutive
	numbers to make it easier to insert additional questions between existing questions. Regardless of the order numbers you assign, open-ended questions always appear at the end of the questionnaire, after all multiple-choice questions.
	Note. If the Randomize Screening Questions field on the Recruiting Installation - Jobs page has a <i>Yes</i> value, then the system disregards the question order and presents questions to applicants in random order. Openended questions still appear after multiple-choice questions.
Action	For multiple-choice questions, a View Answers link appears. Click this link to access the Answers to Screening Questions page, where you can review the answer choices and their default point values. When you set up screening criteria for the job opening, you can override the default values.
	For open-ended questions, an Enter Evaluators link appears. Click this link to access the Assign Evaluators page, where you identify the users who will evaluate and award points to applicants' answers. An evaluator can be any person in the PeopleSoft Human Resources system who has appropriate security access. It is possible to assign yourself as an evaluator.
	When evaluating open-ended questions, evaluators see only the question and the answer; no applicant information is visible.
	Note. Always assign evaluators to open-ended questions. Only the assigned evaluators can award an applicant points for the question, so questions without evaluators are never awarded any points during screening
	See <u>Chapter 17, "Screening and Routing Applicants," Evaluating Answers</u> to Open-Ended Screening Questions, page 436.
Add Screening Questions	Click to add another row to the Screening Questions grid.
Load from Question Sets	Click to access the Select Question Sets page, where you can select one or more question sets whose questions will all be added to the list of screening questions.

See Also

Chapter 5, "Setting Up Screening Processes," Setting Up Screening Questions, page 63

Viewing Answers to Multiple-Choice Screening Questions

Access the Answers to Screening Questions page (click the View Answers link for a multiple-choice screening question in the Screening Questions section of the Job Opening page).

Answers to Screening Questions		
Question: Are you 21 years of age or older?		
Answers		
Answer Description	Default Points	Correct Answer
Yes	10	
No	0	
Return		

Answers to Screening Questions page

Use this page to review answer information, including default point values for each answer.

To change the list of answers, the default points for an answer, or whether an answer is considered correct, use the Question Definition page.

To change the point values for answers for a particular job opening, use the screening pages in the job opening.

See Chapter 13, "Creating Job Openings," Defining Screening Points, page 306.

Assigning Evaluators to Open-Ended Screening Questions

Access the Assign Evaluators page (click the Enter Evaluators link for an open-ended screening question in the Screening Questions section of the Job Opening page).

Assign Evaluators			
	of the way in which an organization can leverage efficient administration p cial responsibility? Please answer in paragraph format using no more th		
Evaluators for Open I	Ended Questions		
Empl ID	Name		
KU0001	Douglas Lewis	+	Î
KU0003	Jean Parsons	+	Î
OK Cancel			

Assign Evaluators page

EmplID	Enter the Employee ID of the users who you want to evaluate applicants' responses to this open-ended question.
Delete	If you remove an evaluator from this page, the evaluator's completed evaluations are <i>not</i> affected. Only pending evaluations (which appear in the Recruiter Alerts pagelet) are removed.

Loading Screening Questions from Question Sets

Access the Select Question Sets page (click the Load from Question Sets link in the Screening Questions section of the Job Opening page).

Select Question Sets		
Question	Set	<u>Customize Find</u> 🌌 🛗 First 🚺 1-15 of 15 Ď Last
Select	Question Set ID	Description
	1008	Variety of questions
	1009	3 General Knowledge Questions
	1011	Seasons
	1012	Basic Eligibility - 0025
	1013	Customer Focus
	1014	Overtime
	1015	Bedding
	1016	Cooking techniques
	1017	Customer Response
	1018	Food Question Set
	1019	Fed eRecruit Personnel Questns
	1020	General SCR with Open Ended Q
	1021	Ethics And Integrity
	1022	Quick Personality Review
	1023	Health Self Certification
ОК	Cancel	

Select Question Sets page

The Question Set grid lists all questions sets in the system. Select one or more whose questions you want to add to the job opening, then click the OK button.

Setting Up Screening for a Job Opening

This section provides overviews of screening settings in the job opening and of U.S. federal screening setup, and discusses how to:

- Define job opening screening levels.
- Choose screening levels to add.
- Define screening level rules and criteria.
- Define screening points.

Understanding Screening Settings in the Job Opening

Screening is the process used by recruiters to evaluate a list of potential candidates and narrow the list to a few qualified applicants that can be interviewed or hired. A job opening can have multiple screening processes, or screening *levels*, and each screening level can evaluate different criteria and use different processing rules.

Screening Level Selection

The Screening Options section on the Job Opening page includes a grid containing an ordered list of screening levels for the job. This section also includes a check box that you use to indicate whether applicants must pass the previous screening level before being included in subsequent screening levels.

If you include a screening level for prescreening, it is always the first screening level. If you include a screening level for online screening, it always goes before any other screening levels except the prescreening screening level.

See <u>Chapter 5</u>, "Setting Up Screening Processes," Understanding Prescreening and Online Screening, page 77

Screening Criteria Selection

The screening level definitions that you reference from the job opening include default processing rules, but they do not include any actual screening criteria. Use the Job Opening Screening Criteria page to select job opening-specific criteria for each level.

When you access the Job Opening Screening Criteria page for a screening level, the grid where you select screening criteria is automatically populated with certain attributes of the job opening. You then select which of the available items to use in the screening level that you are configuring.

The job opening attributes that are available for use as screening criteria fall into four groups:

• *General requirements* come from fields that you populate in the Job Information and Salary Information sections of the Job Opening page.

Fields where you do not enter data do not appear in the list of available screening criteria.

General requirements come from these job opening attributes: regular/temporary, full-time/part-time, start date, standard hours, shift, travel percent, minimum and maximum age, sex, citizenship status, recruiting location, minimum salary, and minimum grade.

Education and experience requirements come from the Education and Experience section of the Job Opening page.

These requirements indicate the number of years of experience required for applicants with various levels of education. Each set of values—a degree and the years of experience required of applicants with that degree—is processed separately. To prevent the system from penalizing someone with the correct amount of experience but a higher degree, the job opening should include rows for every degree above the minimum requirement. To indicate that any amount of experience is acceptable for applicants with a given degree, enter 0 as the experience requirement for that degree.

Note. When the screening process evaluates whether an applicant meets particular education & experience requirements, it fails applications where there are no work experience entries with start dates, even if there are zero years of work experience required.

• *Screening questions* are created outside of the job opening and then added to the Screening Questions section of the Job Opening page.

Screening questions enable you to ask multiple-choice or open-ended questions to applicants who apply online. Open-ended questions must be associated with one or more evaluators who can judge the applicant's answer and award points.

Note. Unlike the other types of screening criteria, screening questions are useful only if applicants can submit applications online. It is not possible to enter answers to screening questions in the Application Details page.

• *Profile content types* are job opening attributes whose properties are configured in the Manage Profiles module in PeopleSoft Human Resources and then configured for use in Talent Acquisition Manager.

For example, Oracle delivers content types for competencies and language skills. If a job opening includes sections for these content types (which depends on the job opening template that is associated with the job opening), then any values that a recruiter enters in these sections (specific competencies and specific language skills) are included in the criteria list on the Job Opening Screening Criteria page.

Profile content types must be explicitly configured for use in screening.

See Chapter 3, "Setting Up Profile Integration," Configuring Profiles for Recruiting, page 28.

The following table lists general requirements that can be used for screening and shows the corresponding applicant data fields:

Job Opening Field	Applicant Field
Citizenship Status	Are you a U.S. Citizen?
Gender	Gender
Maximum Age	Date of Birth
Minimum Age	Date of Birth
Minimum Salary	Minimum Pay
(USF) Minimum Pay Grade	(USF) Minimum Acceptable Pay Grade

Job Opening Field	Applicant Field
Full/Part Time	Full/Part Time
Shift	Desired Shift
Regular/Temporary	Regular/Temporary
RS Location	First Choice
	Second Choice
Start Date	Desired Start Date
Standard Hours/Week	Desired Hour Per Week
Travel Percentage	Willing to Travel

Screening Criteria Point Values

When you define the job-specific criteria for a screening level, you must also provide a point value for each item that you select. The criteria grid includes a points field that displays the maximum point value for each item. Points can be positive or negative.

You assign point values differently depending on the type of criteria:

• For criteria that is either met or not met, the points field is editable so you can directly enter a point value.

Use this method of assigning point values for all general requirements, all education and experience requirements, and certain content types such as licenses that an applicant either has or does not have.

For example, if there is a general requirement that the applicant be at least 18 years old, the applicant either does or doesn't meet the requirement. Therefore, you can enter the point value for this requirement directly on the Job Opening Screening Criteria page.

• For content types that are associated with rating scales (such as competencies), click a link to access a page that lists the possible ratings, and enter the point value for each rating.

Default point values come from the content type definition, but you can override these defaults.

Applicant receive the points that correspond to their rating (as long as the rating type for the applicant's rating matches the required rating type). Unrated applicants receive no points, so it is important that applicants be rated before you run a screening level that evaluates a competency or other qualification with a rating scale.

• For multiple-choice screening questions, click a link to access a page that lists the possible answers, and enter the point value for each answer.

Default point values come from the question definition. You can assign point values to both correct and incorrect questions. If there multiple correct answers, the total value of the question is the sum of the point values of all correct answers.

Applicants receive the points that correspond to the answer or answers that they provided. They receive no points for unanswered questions.

• For open-ended screening questions, click a link to access a page where you enter the maximum point value.

The default maximum point value comes from the question definition.

Applicants receive the average score from all evaluators. If some, but not all, evaluators have entered points for the answer, only the completed evaluations are considered. Applicants receive no points for unevaluated questions.

Screening Level Processing Rules

The Job Opening Screening Criteria page also includes fields that you use to:

- Indicate the percent of the total available points that an applicant needs to earn to pass the screening level.
- Assign dispositions to screened applicants.
- Assign overall screening level scores to screened applicants.
- Send letters to rejected applicants.

Letters can either be sent through email when the rejected disposition is applied, or letters can be generated and printed in batch.

These settings are all identical to the corresponding fields in the screening level definition, and, in fact, are populated based on the default values in the screening level definition. You can override these defaults as needed.

See Chapter 5, "Setting Up Screening Processes," Understanding Screening Levels, page 74.

(USF) Understanding U.S. Federal Screening Setup

This overview discusses the U.S. federal screening process and the screening configuration options that Talent Acquisition Manager provides to support this process.

Important! Oracle provides options that you can use to achieve compliance, but you are responsible for configuring the system to comply with applicable regulations.

Federal Screening and Ranking

U.S. government agencies follow a defined screening and ranking process to produce a ranked list of eligible candidates for a job opening. Applicants are ranked according to the manual classification of screening scores as qualified, well qualified, or best qualified along with factors such a veteran's preference and the use of tie breaker functionality.

Applicants typically earn points in three stages:

1. An initial screening level that you configure to be worth a fixed amount of points to applicants who pass.

2. A second screening level that you set up to use a process known as *transmutation*, which converts the raw score based on a transmutation portion that you define.

For example, if you configure the first screening level to be worth 70 points, and you need the total for both screening levels to be on a scale that goes to 100, then you would use 30 as your transmutation portion. The system would then convert the applicant's raw points for the transmuted screening level to a scale that goes up to 30.

There is a configuration option that you use to determine whether to use an hourly or salaried transmutation process for a particular screening level in a job opening.

3. Veterans preference points that are added to the final screening score.

See Chapter 5, "Setting Up Screening Processes," (USF) Setting Up Veterans Preference Codes, page 87.

Salaried Transmutation Calculation

The salaried transmutation process calculates the percentage of the total possible raw points that the applicant received for the screening level and then applies that percentage to the total possible points (the transmutation segment that you specify) to calculate the applicant's score for the screening level.

For example, Brian Waters is being screened using salaried transmutation and a transmutation segment of 30. His raw score is 15 out of a possible 20 points, or 75% of the possible points for the screening level. He therefore receives 75% of 30, or 22.5 as his score for this screening level. Because scores are always whole numbers, Brian's total is rounded up to 23 points.

Hourly Transmutation Calculation

The hourly transmutation process calculates the score somewhat differently because of a requirement that the applicant receive at least half of the available points. It is typically used when the criteria in the first and second screening levels are identical, and the first screening level is configured to award points if the applicant achieves half of the total possible points. That is, if an applicant achieved 18 points out of a possible 20 points to pass the first screening level, then there are 18 - 10, or 8 points left to be transmuted in the second level.

The hourly transmutation calculation determines what percent of the transmutation segment to award using the ratio of (the applicants points above the 50% threshold) to (the total available points above the 50% threshold).

For example, Mary Stone is being screened using hourly transmutation and a transmutation segment of 30. Her raw score is 15 out of a possible 20 points.

Rather than determining the ratio of 15 (earned) to 20 (possible) points, the system first subtracts half of the available points, or 10, from both numbers — those ten points should have been accounted for in the preceding screening level. The result is that the system performs the transmutation based on these adjusted numbers: 5 earned points and 10 possible points.

Because Mary's adjusted earned points are half of the adjusted available points, her final score for the screening level is half of 30, or 15.

Rules for Ranking Applicants

At the end of the applicant screening process, applicants' cumulative screening scores are adjusted for veterans preference to produce a final score. Next, you qualify the applications by manually entering score thresholds and applying those thresholds to classify applicants as qualified, well-qualified, or best-qualified based on their scores.

Note. Applicants cannot be ranked unless the manual process of qualifying them has been completed.

The system then considers these qualification classifications along with the applicants's priority processing status and places applicants in these four categories:

- Category 1: Qualified, well qualified, and best qualified applicants with Must Select priority placement.
- Category 2: Well qualified and best qualified applicants with Must Consider priority placement.
- Category 3: Best qualified applicants with no priority placement.
- Category 4: Qualified and well qualified applicants with no priority placement.

Rules that you configure for each job opening control which categories of applicants are included in the final ranking. The rules enable you to include different categories for competitive applicants and noncompetitive applicants.

You can also choose whether veterans receive preference in tie-breakers.

Prerequisites

Before you configure screening for a job opening, you must set up the screening level definitions that you will use, and you must enter data in all of the job opening fields that you intend to use as screening criteria.

If you want the system to place a default set of screening levels in newly created job openings, you can associate screening levels to screening template and screening templates to recruitment templates. However, this task is optional.

Pages Used to Set Up Screening for a Job Opening

Page Name	Definition Name	Navigation	Usage
Job Opening page: Screening section	HRS_JOB_OPENING	Recruiting, Create New Job Opening	Enter screening options for a job opening.
		Click the Continue button on the Enter Primary Job Opening page and, if necessary, on the View Combined Profile Information page.	
		• Recruiting, Find Job Openings	
		Click the link for a job opening in the search results, then click the Job Details tab.	
		Click the link that corresponds to the type of job opening data you want to access.	
Add Screening Levels	HRS_SCR_ADD_SEC	Click the Add Screening Options link on the Job Opening page.	Add screening levels to the job opening.
Job Opening Screening Criteria	HRS_JO_SCR_DTL	Click the screening level link in the Applicant Screening grid on the Job Opening page.	Add screening criteria to screening levels.
View Text ID Text Message	HRS_JO_SCR_VW_SEC	Click any of the View <type of> Message links on the Job Opening Screening Criteria page.</type 	View the complete text of a message that you selected to use as an explanatory message, a pass message, or a fail message for prescreening or online screening.
Define Screening Points	HRS_JO_SCR_RTG_SEC	In the Screening Requirements group box in the Job Opening Screening Criteria page, click the Edit Details link for an item that is associated with a rating scale.	Review and override points for ratings on a rating scale or answers to a multiple- choice question. Review and override the maximum point value of open-ended questions.

Defining Job Opening Screening Levels

Access the Job Opening page (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the Reviewing Profile Data page).

Note. The template for the job opening controls whether this section appears and, if so, where it appears.

Select the Add Screening Options hyperlink to add screening levels to this Job Opening. Select the hyperlink for a particular screening level to further refine that level's screening requirements. Applicant Screening		
Job Code: NF0031 Supervisory Personnel Manageme Max Total Points: 100		
Applicant Sc	reening	
Sequence	Screening Levels	
1	Pre Screening	Î
2	Online Screening	Î
3	Preliminary	Î
4	Final	Î
+ Add Screening Options		

Job Opening page: Screening tab

The following illustration shows how the screening section looks in a federal implementation:

	d Screening Options hyperlink to add screen r screening level to further refine that level's creening			perlink
Job Code: Max Total P	oints: 100	Sr	Must Pass Previous Levels	
👻 Federal				
	nented Score Limit: 0		Tie Break Number: 0	
Raw Veter	ans Pref Score Limit: 0			
Competiti	ve			
Rank	Candidates of Category 1		Rank Candidates of Category 2	
	Candidates of Category 3		Rank Candidates of Category 4	
	an Preferred in Tie Break		, ·	
Non-com	petitive			
Rank	Rank Candidates of Category 1 Rank Candidates of Category 2			
Rank	Rank Candidates of Category 3			
Veter	Veteran Preferred in Tie Break			
Applicant S	creening			
Sequence	Screening Levels		Transmutation USF	
1	Minimum Qualifications			Î
2	Quality Ranking			Î
+ Add Scre	eening Options			

Screening section in a U.S. federal implementation

Note. In the screening section on the Job Opening page, all fields except for the Transmutation USF check box (visible only in U.S. federal implementations) have default values that come from the screening template.

Max Total PointsEnter the maximum points that an applicant can accumulate across all
screening levels. During the applicant ranking process in U.S. federal
implementations, the Rank Applicants page shows applicants' final scores
both as numbers and as a percentage of the value you enter here, which is
typically 100.

Must Pass Previous Levels	Select this check box if the applicant must pass the previous screening level
	before being evaluated for the next screening level. This does not apply to:

- The first screening level, as indicated by the lowest sequence number.
- Prescreening or online screening levels.

Prescreening is always the first screening level anyway. Online screening can be preceded by prescreening (although the best practice is to use only one or the other in a job opening), but because failing prescreening stops the online application process, applicants cannot even reach the online screening phase without passing any preliminary prescreening.

(USF) Federal

These fields are identical to the corresponding fields in the screening template.

Raw Augmented Score Limit	Enter the total number of augmentation points that can be awarded. You can configure screening to award augmentation points for certain competencies or accomplishments that are not required for the position but may be given consideration in the selection process.
Raw Veterans Pref Score Limit (raw veterans preference score limit)	Enter the maximum number of points that can be added to an applicant's final screening score for veterans preference. The number that you enter overrides veterans preference score higher than the limit.
Tie Break Number	Enter a random number to use in the tie-breaking algorithm for ranking applicants.

(USF) Competitive and Non-Competitive

These fields are identical to the corresponding fields in the screening template.

The same fields appear in the Competitive and Non-Competitive group boxes so that you can separately configure ranking options for competitive and noncompetitive applicants.

Rank Candidates of Category 1, Rank Candidates of Category 2, Rank Candidates of Category 3, and Rank Candidates of Category 4	to classify the candidates as qualified, well-qualified, or best-qualified. The
	• Category 1: Qualified, well qualified, and best qualified applicants with <i>Must Select</i> priority placement.
	• Category 2: Well qualified and best qualified applicants with <i>Must Consider</i> priority placement.
	• Category 3: Best qualified applicants with no priority placement.
	• Category 4: Qualified and well qualified applicants with no priority placement.
	Select check boxes for each category of applicants that are to be included in the final applicant ranking that produces the Certificate of Eligibles.
	See <u>Chapter 5, "Setting Up Screening Processes," Understanding Priority</u> <u>Placement Processing, page 83.</u>
Veteran Preferred in Tie Break	Select this check box if you want applicants with veteran status to win tiebreakers during the ranking process.

Applicant Screening

This grid lists the screening levels for the job opening.

SequenceThe sequence determines the order in which you run the listed screening
levels. The screening template that provides the default list of screening
levels also sets their default sequence.

You cannot change the sequence directly. However, screening levels that you add to the list are automatically put at the end of the sequence. So to change the order of the default screening levels, you can remove screening levels from the list and re-add them in the desired order.

Regardless of how screening levels are added to the list, the sequences starts with the prescreening level (if any), followed by the online screening level (if any), followed by all other screening levels.

Screening Levels	Displays the name of the screening level.				
	Standard screening levels can appear in the list multiple times. However, the list can include a maximum of one prescreening level and one online screening level.				
	Click the link to access the Job Opening Screening Criteria page so that you can choose screening criteria and, if necessary, override default processing rules.				
	Note. After you click a screening level, the system saves the job opening before displaying the Job Opening Screening Criteria page.				
Transmutation USF	Select this check box for the screening level where transmutation is applied during U.S. federal screening. This is the second of the two levels whose scores are combined to produce a cumulative score of up to 100 points.				
	When you select this check box, the system validates that the preceding screening level does not use transmutation, but you must verify that all screening levels are set up correctly.				
	Note. A transmutation screening level is always preceded by a non-transmutation screening level.				
	When you select this check box, you must enter additional transmutation information in the Job Opening Screening Criteria page.				
	See <u>Chapter 13, "Creating Job Openings," (USF) Understanding U.S.</u> Federal Screening Setup, page 289.				

Choosing Screening Levels to Add

Access the Add Screening Levels page (click the Add Screening Options link in the screening options section on the Job Opening page).

Add Screening Levels				
Add Screening Options				
Select	Screening ID	Description		
	3	Basic		
	4	Min Quals		
	6	Ranking		
	1000	Basic Screening		
	1001	Basic Eligibility		
	1002	Minimum Qualifications		
	1003	Quality Ranking		
	1004	Preliminary		
	1005	Final		
	1012	Pre Screening		
	1013	Online Screening		
ОК	Cancel			

Add Screening Levels page

The page lists the screening levels that your organization has defined. Select the check box next to the screening levels that you want to add, then click the OK button.

Note. A job opening can have only one prescreening level and only one online screening level.

Defining Screening Level Rules and Criteria

Access the Job Opening Screening Criteria page (click the screening level link in the Applicant Screening group box on the Job Opening page).

Job Opening					
Job Openir	ng Screeni	ng Criteria			
			🖨 <u>Print Job Open</u> i	ing	
Posting Title:	Supervi	sory Personnel Manageme	Job Opening ID:	900001	
Job Opening Statu	s: 010 Op	en	Job Type:	Standard	
Position Number:					
Business Unit:	NFSBU	Federal Recruiting Solutions			
Job Family: Screening Optio	n Description				
-	Final	1005			
	Screen 🔽				
Pass Reason:	•				
Fail Status:	Reject 💌				
Fail Reason:	-				
Letter:		•	🗖 Hourly Transmutat	tion	
Ī	Send Letter a	s Email When Results Are Appli	ed		
Scoring Definit	ion				
Assign Points					
Percent Neede	ed to Pass:	100 Use Raw P	oints		
Maximum Points to Assign: Transmutation Segment:					
Points Assign	ed for Pass:	0 Points Assigne	d for Fail: 0		
C Manually A	ssign Status				

Job Opening Screening Criteria page (1 of 3)

Screening Requirements									
Description	Item	Description	Edit Details	Use in Screening	Required	Augment	Selective	Points	
General Requirement	Regular / Temp : Regular							1	^
General Requirement	Full / Part Time : Full- Time							1	
General Requirement	Desired Start Date : 2009-08-25							0	
General Requirement	Travel Percent : None							0	
General Requirement	Minimum Salary : 4000 - Month							0	
General Requirement	RS Location : 22							0	
Education & Experience	Education: Bachelor's Degree, 4 Years of			L				3	
Screening Question	Question: Employee Input and Development		<u>Edit</u> Details	V				2	2
Screening Question	Question: Open Ended - General		Open Ended					4	

Job Opening Screening Criteria page (2 of 3)

Competencies	Accountability for decisions	Approved/Official - Proficiency	<u>Edit</u> Details				5
Competencies	Communication Skills	Self - Proficiency	<u>Edit</u> Details				0
Degrees	Bachelor of Arts	Degree		•			0
Language Skills	English	Able To Translate	<u>Edit</u> Details				0
Language Skills	English	Reading Proficiency	<u>Edit</u> Details				0
Language Skills	English	Speaking Proficiency	<u>Edit</u> Details				0
Language Skills	English	Writing Proficiency	<u>Edit</u> Details				3
Language Skills	English	Native Language	<u>Edit</u> Details				0
Language Skills	English	Language					0
Language Skills	English	Able To Teach	<u>Edit</u> Details				0
Licenses & Certifications	Personnel Management Associatn	License		V			1
Total Screening Points: 20							

Job Opening Screening Criteria page (3 of 3)

Screening Option Description: Page Elements for All Screening Levels

Use the fields in this group box to define the rules for processing applicant statuses and rejection letters or email after screening results are applied. The default value come from the screening level definition.

Pass Status and Pass Reason	Select the disposition (and, optionally, an associated reason) for the system to assign applicants who pass this screening level. Typically, you assign the <i>Screen</i> . disposition.
Fail Status and Fail Reason	Select the disposition (and, optionally, an associated reason) for the system to assign applicants who fail this screening level. Typically, you assign the <i>Reject</i> disposition.

Screening Option Description: Page Elements for Standard Screening Levels

These page elements appear only for standard screening levels (levels that are not for prescreening or online screening).

Letter	Select a letter to send to applicants who fail this screening level. The letter is added to the queue for the Generate Recruitment Letter (HRSLETTER) process after screening results are applied. The drop-down list box includes all of the letters in the HRS_APP_LET report definition, which includes letters for various purposes. Take care to select the appropriate letter. The sample rejection letter that Oracle delivers is HRS_APP_LETTER_IR.	
	See Chapter 22, "Managing Applicants," Generating Batch Recruitment Letters, page 647.	
Send Letter as Email When Results are Applied	Select this check box to have the system send rejected applicants an email with the text of the selected rejection letter. The system sends the email (and creates a contact note) after the results for the screening level are applied. If you choose to send the letter as email, the letter is not added to (or is removed from) the queue for the Generate Recruitment Letter process.	
	Only applicants who have provided an email address can receive their rejection letter through email.	
(USF) Hourly Transmutation	If the screening level uses transmutation to calculate applicants' scores (that is, if you selected the Transmutation USF check box in the grid that lists all screening levels for the job opening), select this check box to use hourly transmutation rules. Leave the check box deselected to use salaried transmutation rules.	
	See <u>Chapter 13, "Creating Job Openings," Salaried Transmutation</u> <u>Calculation, page 290</u> and <u>Chapter 13, "Creating Job Openings," Hourly</u> <u>Transmutation Calculation, page 290.</u>	

Screening Option Description: Page Elements for Prescreening and Online Screening

These page elements appear only for screening levels for prescreening and online screening.

Screening Opt	ion Description			
Name:	Pre Screening		1012	
Pass Status:	_	Explain Text ID:		View Explanatory Message
Pass Reason:	_	Pass Text ID:		View Pass Message
Fail Status:	•	Fail Text ID:		View Fail Message
Fail Reason:	•	🗌 Pass Email Flag	🗖 Fail Email Flag	
			Hourly Transmutation	

Screening Option Description section for online screening and prescreening

Explain Text ID	Select the ID for the message that Candidate Gateway presents to applicants when they reach the point where this screening level is to be processed. Use this message to give the applicant instructions or other relevant information.
	Explanatory text is required for prescreening and optional for online screening. The screening level definition does not include a field for a default explanatory message, so you must enter this information on each job opening that requires an explanatory message.
Pass Text ID and Fail Text ID	Select the IDs for the messages that Candidate Gateway presents to applicants who pass and who fail this screening level.
	Messages are required for prescreening and optional for online screening. Default values come from the screening level definition.
View Explanatory Message, View Pass Message, and View Fail Message	Click these links to access the View Text ID Text Message page, where you can review the complete test of the selected message.
Pass Email Flag and Fail Email Flag	Select these check boxes to make the system send screening applicants an email containing the pass message or fail message, depending on the screening results. The system sends the email in addition to displaying the message online.

Scoring Definition and Assign Points

Use the fields in this group box to define the rules for how screening levels will be scored. The default values come from the screening level definition.

See Chapter 5, "Setting Up Screening Processes," Setting Up Screening Level Definitions, page 80.

Percent Needed to Pass	Enter the minimum percentage amount of the total possible points that an applicant must have to pass the screening level. If you leave this field blank, the pass threshold is 0%, and all applicants will pass.	
	Note. Because an applicant can have only one highest level of education, applicants can receive points for only one of the Education & Experience rows. If you screen based on more than one row of Education & Experience criteria, applicants will never be able to earn 100% of the points that can be awarded for the screening level.	
	For U.S. Federal salaried screening, the first screening level typically requires applicants to achieve 100% to pass.	
	For U.S. Federal hourly screening, the first screening level typically requires applicants to achieve 50% to pass.	
	For both types of U.S. Federal screening, you can leave these fields blank for the second screening level, which uses transmutation to calculate a score.	
Use Raw Points	Select this check box if you want scores for the screening level to be the sum of the actual points that the applicant earned for the screening level. When this check box is selected, transmutation is not available.	
	If you select this check box, do not enter values in the Maximum Points to Assign, Points Assigned for Pass, or Points Assigned for Fail fields.	
Maximum Points to Assign	Use this field to optionally enter a maximum number of points to assign.	
Points Assigned for Pass and Points Assigned for Fail	Enter scores to assign to all applicants who pass or fail this screening level. If you leave this field blank, the system enters 0. You can enter negative points.	
Manually Assign Status	Select this check box to allow recruiters to manually override an applicant's pass/fail status for a screening level.	
	When this check box is selected, the rest of the scoring-related page elements become read-only. To modify the read-only fields, first deselect the Manually Assign Status check box, then make the changes before selecting the check box again.	

Screening Requirements

This grid displays all available screening criteria so that you can select which items to use in the screening level.

See <u>Chapter 13, "Creating Job Openings," Understanding Screening Settings in the Job Opening, page 286</u> and <u>Chapter 5, "Setting Up Screening Processes," Making Content Types Available for Screening, page 72.</u>

Description (first column)	Displays the type of screening criteria. <i>General Requirements</i> items appear first, then <i>Education & Experience</i> items, then <i>Screening Question</i> items.
	The remaining items in the grid are job opening attributes based on profile content types. This includes job qualifications such as <i>Competencies, Degrees,</i> and <i>Language Skills.</i> The content type definition provides the descriptive text that appears in this column.
Item and Description	Displays the specific job requirement that is available for screening.
	For general requirements, screening questions, and education & experience requirements, text in the Item column concatenates the name of the requirement (for example, Full/Part Time) and the value to be matched (for example, Full-Time). The adjacent Description column is blank.
	For content type items, the text in the Item column is simply the name of the content item as defined in the Manage Profiles content catalog. For example, if the content type is <i>Memberships</i> , the Item column identifies the membership. The next column displays the specific property, such as <i>Membership</i> , that is evaluated during screening.
	Note. Settings on the Content Section Configuration page control the profile data that is available for screening.
	See <u>Chapter 5, "Setting Up Screening Processes," Making Content Types</u> <u>Available for Screening, page 72.</u>
	If the content types uses instance qualifiers to organize content items, the instance qualifier also appears in the Description column. In particular, competencies use the evaluation type (Self, Supervisor/Manager, Peer, and so forth) as instance qualifiers, and therefore the evaluation type appears next to the property name (Proficiency) in the Description column.
	When setting up screening criteria, you might need rows for more than one evaluation type. For example, external applicants can be screened based on their self-determined proficiency ratings, while internal applicants might be screened based on official competency ratings.
	See <u>Chapter 13, "Creating Job Openings," Instance Qualifiers and</u> <u>Competencies, page 240.</u>
Edit Details	Displays a link that varies depending on context:
	The link text is <i>Edit Details</i> for content types such as competencies that provide a rating scale and for multiple-choice questions. Click the link to access the Define Screening Points page, where you can assign different scores to different ratings or question answers.
	The link text is <i>Open Ended</i> for open-ended questions. Clicking this link also opens the Define Screening Points page, but in this mode, the page displays the text of the open-ended question and enables you to override the default maximum point value for the question.
	This column is blank for other types of qualifications.
Use in Screening	Select this check box if you want the screening process to evaluate whether applicants meet the criteria for this item.

Required	Select this check box if the applicant must have this criteria to pass the screening level. If the system determines that the applicant does not have this criteria (or incorrectly answers this question), the applicant fails the screening level even if the overall point total meets the passing threshold.
	Online screening, including prescreening, applies this requirement instantly; there is no opportunity for a human to review screening results before applying them. For these screening levels, then, selecting this check box for a question makes it into an immediate disqualification question.
(USF) Augment	Select this check box if the points for this criteria are considered augmentation points. The points associated with the screening requirement are shown in the Augmentation Points category on the Screening Details page
	For example, if you award 10 points for full time, 10 points for regular, and you mark the Augment check box for the full time, an applicant who meets both the full time and regular criteria is awarded 10 points for regular, no points for full time, and 10 augmentation points.
(USF) Selective	Select this check box if the points for this criteria are considered selective factors. The points associated with the screening requirement are shown in the Selective Factor Points category on the Screening Details page.
Points	Enter the number of points the applicant receives if they meet the requirement.
	For certain types of qualifications, this column is read-only and displays the maximum possible point value as shown on the Define Screening Points page. These qualifications include:
	• Multiple-choice questions: each answer can be associated with a different number of points, and those points can be added together when there is more than one correct answer.
	• Open-ended questions: the question is associated with a maximum value, but evaluators rate the applicants' answers using any number of points up to the maximum.
	• Content types such as competencies that provide a rating scale: each rating can be associated with a different number of points, and the applicant is awarded the points for the rating that applies.
	Note. All qualifications that you use during screening should be associated with points. The system ignores any selected items which do not have points, and if you leave the page and come back, you will see that the Use in Screening check box has been deselected for any criteria that does not have points.
Total Screening Points	Displays the maximum possible points for the screening level based on the entered scores, including points for all correct answers to questions, and the highest possible score for rated qualifications.

Defining Screening Points

Access the Define Screening Points page (click the Edit Details link or the Open-Ended link in the Screening Requirements group box in the Job Opening Screening Criteria page).

Define Screening Points	
Competencies	
Competency: Ability to manag	e own time
Description: Approved/Official	
Define Points	- Toliciency
Rating	Points
0-None	0
1-Little	1
2-Fair	2
3-Good	3
4-Very Good	4
5-Expert	5
OK Cancel	

Define Screening Points page

For content types that use rating scales, review and optionally override the default points that are awarded for specific ratings.

For multiple-choice questions, review and optionally override the default point value for both correct and incorrect answers.

For open-ended questions, review and optionally override the maximum point value for the question.

Creating Job Postings

This section discusses how to:

- Create job postings.
- Add job posting details.

See Also

<u>Chapter 8, "Setting Up Additional Recruiting Definitions," Setting Up the Job Posting Description Library, page 107</u>

Chapter 14, "Managing Job Postings," page 331

Pages Used to Create Job Postings

Page Name	Definition Name	Navigation	Usage
Job Opening	HRS_JOB_OPENING	 Recruiting, Create New Job Opening Click the Continue button on the Enter Primary Job Opening page and, if necessary, on the View Combined Profile Information page. Recruiting, Find Job Openings Click the link for a job opening in the search results, then click the Job Details tab. Click the link that corresponds to the type of job opening data you want to access. 	Enter job opening data, including job postings.
Posting Information	HRS_JO_PST_DTL_SEC	Click the job posting title link in the Job Postings group box on the Job Opening - Job Opening Details page.	Add job posting details.
Job Description	HRS_JOB_DTL_PRVW	Click the Preview button on the Posting Information page.	Preview a formatted job posting in its entirely.

Creating Job Postings

Access the Job Opening page (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the Reviewing Profile Data page).

Note. The template for the job opening controls whether this section appears and, if so, where it appears.

Select Add Job Postings to add a new posting. To delete an existing posting select the delete icon against the posting you wish to delete. Job Postings			
Postings	Vacancy Announcement Number	Primary Posting Title	
<u>Sr Financial Analyst</u>			Î
+ Add Job Postings			

Job Opening page: Job Postings section

Job Postings

Postings	Click the posting link to display the Posting Information page, where you can edit the posting information.
Primary Posting Title	Click to indicate that this is the primary posting title. The system uses the primary posting title to identify the job opening on various pages throughout the system.
Add Postings	Click to Add Job Posting link to display the Posting Information page, where you can add posting information.
	Generally you create multiple postings if you want to post different information to different destinations. It is possible for multiple postings to have the same destination; in this case, there will be duplicate postings (although the posting titles may be different).

Adding Job Posting Details and Destinations

Access the Posting Information page (click the job posting title link in the Job Postings group box on the Job Opening - Job Opening Details page).

Job Opening				
Posting Information	Posting Information			
Job Postings				
Posting Title: Manager-HR Systems				
✓ Federal Information				
VA Number:	Cleared Date:			
Type of Examining:	Vacancy Fill Method:			
Extend Date:	Early Conside Date:			
Date Re-Opened:	Last Submit Date:			

Posting Information page (1 of 3)

Job Descriptions	<u>Find</u> First 🚺 1 of	1 🗈 Last
*Visible:	Internal and External	Ô
*Description Type:	How To Apply	
Description ID:	All positions filled through Merit Promotion proce	
Description:	$ \boxed{\mathbf{A}} \stackrel{\bullet}{\Rightarrow} \boxed{\mathbf{B}} \stackrel{\bullet}{\Rightarrow} \stackrel{\bullet}{\Rightarrow} \boxed{\mathbf{B}} \stackrel{\bullet}{\Rightarrow} \stackrel{\bullet}{\Rightarrow} \boxed{\mathbf{B}} \stackrel{\bullet}{\Rightarrow} \boxed{\mathbf{B}} \stackrel{\bullet}{\Rightarrow} \boxed{\mathbf{C}} $ $ \overrightarrow{\mathbf{Format}} \stackrel{Normal}{\bullet} \stackrel{\bullet}{Font} \stackrel{\bullet}{\bullet} \overrightarrow{\mathbf{Size}} \stackrel{\bullet}{\bullet} \stackrel{B}{I} \stackrel{U}{=} \stackrel{\bullet}{\Rightarrow} \underbrace{I} \stackrel{\bullet}{=} \underbrace{I} $	•
	 All positions filled through merit promotion procedures by the West Civilian Personnel Operations Center are filled under RESUMIX, an automated ranking and referral system. Only one resume and supplemental data sheet is required for ALL occupational series and locations (up to a combination of 20) for which you indicate interest. West CPOC Resumix application procedures must be followed to receive consideration. Application procedures can be obtained on the West Region Web site at: http://www.cpoc.army.mil, then click on Employment Opportunities. 	
	You will be instructed to: 1. Prepare a maximum 2 page resume using the Resumix format. 2. Complete the Supplemental Data Sheet. 3. Submit the resume by email or regular mail.	•
	body p span strong em	
+ Add Posting Descript	verions	

Posting Information page (2 of 3)

Job Posting Destin	ations				Customize Find	🔠 First 🗹 1 of 1 🖸	Last
*Destination		*Posting Typ	e Relative Open Date	Post Date	Remove Date	Posting Duration (Days)	
Intranet	•	Internal	 Seven days 	08/16/2009	31		Î
+ Add Posting Des	<u>tinations</u>						
ОК Са	ncel	Preview					

Posting Information page (2 of 3)

Job Postings

Posting Title

Displays the title entered on the Job Opening page, but can be modified.

(USF) Federal Information

Use the fields in this group box to meet the posting requirements for U.S. federal job openings if third-party integration has been set up.

Job Descriptions

Visible	Specify whether this posting description is visible to <i>Internal, External</i> , or <i>Internal and External</i> applicants.
Description Type	Select a description type. The choices available to you are defined on the job posting template that is linked to the recruitment template assigned to the job opening.
Description ID	Select a description from the Posting Description Library page. The system automatically populates the Description field with the text from the library posting.
Description	Displays the content of the selected Description ID. Use this field to modify and format the posting text in each section of the job posting.
Add Posting Descriptions	Click to add another section to the job posting.

See <u>Chapter 8, "Setting Up Additional Recruiting Definitions," Setting Up the Job Posting Description</u> <u>Library, page 107.</u>

Destination	Select the recruitment source where you are sending this posting. Three types of recruitment sources are available for selection:
	• <i>Company</i> recruitment sources represent your organization's own job sites. The job posting appears on the sites that are associated with the recruitment source.
	• <i>Vendor</i> recruitment sources represent third-parties such as job boards or service procurement providers. A posting that includes a vendor recruitment source is available to be sent to the vendor using the Open Integration Framework. The system does not send the posting automatically, however. Instead, the posting appears on the Manage External Postings page, where users can post, unpost, and update specific job openings.
	• <i>Marketing</i> recruitment sources are places where you advertise job openings Examples might include internet or email advertisements, print advertisements, and job fairs. There is no integration with marketing sources, so including a marketing source as a posting destination is informational only.
	See <u>Chapter 11</u> , "Setting Up Recruitment Sources," page 207; Chapter 6, "Setting Up Candidate Gateway Sites," Setting Up Sites, page 91 and Chapter 14, "Managing Job Postings," Managing External Job Postings, page 339.
Posting Type	Select the type of posting.
	To make postings available on Candidate Gateway sites, you must select one of these values:
	• External
	In PeopleSoft Candidate Gateway, these are the only job postings that external applicants can see.
	• Internal
	In PeopleSoft Candidate Gateway, these are the only job postings that internal applicants can see.
	The remaining values are informational only. Use them for postings to third-party job boards or for non-electronic posting destinations. These values are:
	• Contingent
	• Office
	• Recruitment

Relative Open Date	Choose how far in the future you want the job posting posted to this destination. If you select a value in this field, the system calculates the posting date and displays it in the Post Date field, which becomes unavailable for entry. For example, if the date the job opening reaches the status of <i>Open</i> is September 5, 2009 and you select <i>Ten Days</i> as the relative open date, the Post Date will be September 15, 2009.
Post Date	Enter the date on which you want the job posting posted to this destination.
Remove Date and Posting Duration (Days)	Either enter a specific date on which you want to remove the posting from this destination, or enter the number of days that the posting is to remain active. If you enter a posting duration, the system calculates the removal date and displays it in the Remove Date field, which becomes unavailable for entry.
Preview	
Preview	Click this button to access the Job Description page, where you can review the complete formatted job posting.

Identifying Recruiting Team Members for a Job Opening

This section provides an overview of recruiting teams discusses how to:

- Set up recruiting teams.
- Identify recruiting team members for a job opening.

Understanding Recruiting Teams

When you create a job opening, you identify the recruiters, hiring managers, interviewers, interested parties, and screening team members for the job opening.

You can set up predefined teams whose members can be added to the job opening all at once. If groups of people typically work together on the same job openings, creating teams can save you the time of individually entering each one.

When a team is added to the job opening, the system does not add the actual team ID to the job opening. Instead, users who currently belong to the team are added individually to the job opening. Administrators can remove an individual from a job opening at any time and that individual no longer has access to the job opening.

Only active teams can be added to a job opening.

There is no limit to the number of teams you create, nor to the number of teams to which an employee can belong.

Pages Used to Identify Recruiting Team Members for a Job Opening

Page Name	Definition Name	Navigation	Usage
Teams	HRS_TEAM	Recruiting, Administration, Teams, Teams	Create and maintain teams that can be added to job openings.
Job Opening	HRS_JOB_OPENING	 Recruiting, Create New Job Opening Click the Continue button on the Enter Primary Job Opening page and, if necessary, on the View Combined Profile Information page. Recruiting, Find Job Openings Click the link for a job opening in the search results, then click the Job Details tab. Click the link that corresponds to the type of job opening data you want to access. 	Enter job opening data, including members of the hiring team.
Add Team	HRS_TEAM_ADD_SEC	Click the Add <team type=""> Team link in any of the hiring team section on the Job Opening page.</team>	Identify a team whose members are to be added to the job opening hiring team.

Setting Up Recruiting Teams

Access the Teams page (Recruiting, Administration, Teams, Teams).

Teams					
Teams					
Team ID:	1000				
*Status:	Active	•			
*Description:	Recruiters				
Short Description:	Rec				
Members	<u>(</u>	Customize Find 🗖 🕌	First 🚺 1-3 of 3	D L	.ast
*Empl ID	Name				
KU0105	Vicky Adler		Q.	+	-
KU0106	Kevin Chae		Q	+	-
KU0108	Joyce Hayden		Q	+	-

Teams page

Team ID	Displays the ID assigned to the team.		
Status	Specify whether this team is Active or Inactive.		
EmplID	Select the employee IDs for the members of this team.		

Identifying Recruiting Team Members for a Job Opening

Access the Job Opening page (select Recruiting, Create New Job Opening, then click the Continue button on the Enter Primary Job Opening page and, if applicable, on the Reviewing Profile Data page).

Note. The template for the job opening controls which of these sections appear and where they appear.

Assignments 📀			
To assign a Recruiter to the Job Opening select the Add Recruitering one or more recruiters, to the Job Opening select to Recruiters (?)			n,
*Name	Recruiter ID	Primary	
Vicky Adler	KU0105	V	Î
	uiter Team		
Add Recruiters To assign a Hiring Manager to the Job Opening select the Ad Manager Team containing one or more hiring managers to the Team hyperlink. Hiring Managers P	d Hiring Managers hyper		-
To assign a Hiring Manager to the Job Opening select the Ad Manager Team containing one or more hiring managers to the Team hyperlink. Hiring Managers (?)	d Hiring Managers hyper		-
To assign a Hiring Manager to the Job Opening select the Ad Manager Team containing one or more hiring managers to the Team hyperlink.	d Hiring Managers hyper Job Opening select the	Add Hiring Mana	-

Job Opening page: Hiring Team tab (1 of 2)

Interviewers select the Add Interview Interviewers ?	ver Team hyperlink			
Name			Interviewer ID	
Betty Locherty		Q	KU0007	Î
Charles Baran		Q	KU0002	Î
Carmichael Espinosa		Q	KU0015	Î
James Fung		Q	KU0035	Î
Add Interviewers Add an interested party to the Job interested parties select the Add Inte Interested Darty 2	Opening select the		-	id a group
To add an interested party to the Job	Opening select the	e Add Interested P	-	id a group
To add an interested party to the Job interested parties select the Add Inte Interested Party (?) No Interested Parties have been	Opening select the erested Parties Tea added to this Jo	e Add Interested F m hyperlink. b Opening	- arties hyperlink. To ac	dd a group
To add an interested party to the Job interested parties select the Add Inte Interested Party ?	Opening select the erested Parties Tea added to this Jo	e Add Interested P m hyperlink.	- arties hyperlink. To ac	dd a group
To add an interested party to the Job interested parties select the Add Inter Interested Party (?) No Interested Parties have been Add Interested Parties To add a Screening Notification memb hyperlink. To add a Screening Notific Team hyperlink.	o Opening select the erested Parties Tea added to this Jol	e Add Interested P m hyperlink. b Opening <u>nterested Partie</u> ing select the Add	- larties hyperlink. To ac <u>s Team</u> I Screening Notificatior	n Member
To add an interested party to the Job interested parties select the Add Inter Interested Party ? No Interested Parties have been Add Interested Parties To add a Screening Notification memb hyperlink. To add a Screening Notific	o Opening select the erested Parties Tea added to this Jol	e Add Interested P m hyperlink. b Opening <u>nterested Partie</u> ing select the Add	- larties hyperlink. To ac <u>s Team</u> I Screening Notificatior	n Member
To add an interested party to the Job interested parties select the Add Inter Interested Party (?) No Interested Parties have been Add Interested Parties To add a Screening Notification memb hyperlink. To add a Screening Notific Team hyperlink.	Opening select the erested Parties Tea added to this Joi <u>+ Add I</u> Add I ber to the Job Open cation Team to the J	e Add Interested P m hyperlink. b Opening <u>nterested Partie</u> ing select the Add ob Opening select	- larties hyperlink. To ac <u>s Team</u> I Screening Notification the Add Screening No	n Member

Job Opening page: Hiring Team tab (2 of 2)

Common Elements

Name	Enter the name of the person that you want to add to one of the hiring team groups. The system displays the person's employee ID in the adjacent field.
	All members of the hiring team have access to the job opening, regardless of the person's specific role on the hiring team.
Add <grid name=""></grid>	Click to add another row to the grid.
Add <grid name=""> Team</grid>	Click to access the Add Team page, where you select a team whose members are all added to the grid when you click OK.

Recruiters

Use this group box to identify recruiters for this job opening. Only users who are associated with a recruiting role type can be added to the hiring team as recruiters. Users can be associated with any recruiting role type; it is not necessary to be associated with the *Recruiter* recruiting role type.

See Chapter 7, "Setting Up Recruiting Roles and Security," Understanding Recruiting Role Types, page 100.

Primary	Exactly one recruiter must be identified as the primary recruiter. Select this check box to identify the primary recruiter for this job opening.
	When searching for job openings based on your association with the job, you are considered to be "assigned to" the job opening if you are the primary recruiter; non-primary recruiters are considered to be "associated with" the job opening.
	The primary recruiter receives any offer-related notifications that an applicant submits through Candidate Gateway.
	If job opening approvals are active, the system uses the primary recruiter person as the second approver of the job opening,
	See <u>Chapter 13, "Creating Job Openings," Understanding Job Opening</u> <u>Approvals, page 322.</u>

Hiring Managers

Use this group box to identify hiring managers for this job opening. Only users who are associated with the *Hiring Manager* recruiting role type can be added to the hiring team as hiring managers.

See Chapter 7, "Setting Up Recruiting Roles and Security," Understanding Recruiting Role Types, page 100.

PrimarySelect the primary hiring manager for this job opening.When searching for job openings based on your association with the job,
you are considered to be "assigned to" the job opening if you are the
primary hiring manager; non-primary hiring managers are considered to be
"associated with" the job opening.If job opening approvals are active, the system uses the primary hiring
manager's supervisor as the first approver for this job opening.See Chapter 13, "Creating Job Openings," Understanding Job Opening
Approvals, page 322.

Interviewers

Use this group box to identify interviewers for this job opening.

The system uses this list of interviewers to provide default interviewers when you set up an interview schedule for this job opening. Additionally, the interviewers listed in this grid have security access to the job opening. You can add additional interviewers to the interview schedule, but doing so does not enable those interviewers to access the job opening using the Find Job Openings search page.

See Chapter 18, "Interviewing Applicants," page 479.

Interested Party

Use this group box to identify interested parties for this job opening. Other than having access to the job opening, interested parties have no specific privileges, nor do they receive any notifications.

Screening Team

Use this group box to identify members of the screening team for this job opening. Other than having access to the job opening, screening team members have no specific privileges, nor do they receive any notifications.

Cloning Job Openings

This section provides an overview job opening cloning and discusses how to clone a job opening.

Understanding Job Opening Cloning

When creating a job opening that is similar to an existing one, you can avoid tedious data entry by cloning the existing one. You can clone existing job openings that have any status except *Draft*.

To clone a job opening, find the job opening that you want to clone and click the Clone Job Opening icon or link. The initial status of the newly created job opening depends on whether approvals are active:

• If approvals are active, the status is *Draft*.

This gives the creator an opportunity to review and modify the new job opening before manually submitting it.

• If approvals are not active, the status is Open.

Although the job opening is open, posting information (Relative Open Date, Post Date, and Remove Date) is not copied, so the job is not posted.

When you clone a job opening most of the data is copied from the existing job opening to the new one. However, some data will be left blank or adjusted, as detailed in this table:

Original Job Opening	New Job Opening
Created By	The person who created the new job opening using the cloning process.
Status	<i>Open</i> if approvals is not selected on the Installation table. <i>Draft</i> if approvals are associated with the job opening.
Status Reason	New Authorization
Open Date	Current Date
Status Date	Current Date
Desired Start Date/Projected Fill Date	Set according to the dates in the Open Date field. The system uses the interval between the original job opening's open date and its desired start date or projected fill date to determine the dates for the cloned job opening.
All other dates	Blank
Applicant and interview schedule data	Not copied
Approval process, if one exists	Copied
Primary Recruiter/Hiring Manager Teams	Active teams copied
Additional recruiters, hiring managers, and teams	Active teams copied
Posting dates	Not copied.

Note. When you clone a job opening, the salary range data is copies from the original job opening into the newly created clone. The system does not fetch current salary ranges from the job code table.

Page Name	Definition Name	Navigation	Usage
Clone Job Opening	HRS_JO_CLONE_SEC	Recruiting, Find Job Openings.	Clone a job opening.
		Click a job opening to access the Job Opening page.	
		Click the Clone Job Opening icon or the Clone link on the Job Opening page.	

Page Used to Clone Job Openings

Cloning a Job Opening

Access the Clone Job Opening page (click the Clone Job Opening icon or the Clone link on the Job Opening page).

Job Opening			
Clone Job Opening			
Enter Details			
Job Opening ID:	503712		
Number of New Job Openings:	1		
Clone Job Opening Cancel			

Clone Job Opening page

Job Opening ID	Displays the job opening ID for the job opening that you want to clone.
Number of New Job Openings	Enter the number of job openings that you want to create.
Clone Job Opening	Click to clone the job opening. The system displays a confirmation message.

Creating Job Openings from Open Positions

This section provides an overview of the create Job from Position process discusses how to create job openings from open positions.

Understanding the Create Job from Position Process

To create job openings from open positions, run the Create Job from Position Application Engine process (HRS_CRJOB).

Note. This feature is available only to organizations that use partial or full position management.

During the Create Job from Position process, the system:

1. Determines all current open positions in the company.

To determine whether a position is open, the system uses the PS_POSN_VACANT view on the Position Data table (PS_POSITION_DATA).

- 2. Identifies the maximum head count allowed for each open position.
- 3. Determines the current head count for each open position (how many incumbents, or current employees, fill any or all of the head count).
- 4. Creates one standard requisition job opening for each position number that has openings and sets the status of each new job opening to Draft.

When the system creates a new job opening, it populates the job opening data with data from the position or the derived job code—for example, the business unit, job code, company, department, location, and staffing and salary information. The system also populates the Target Openings field on the Job Opening page with the number of openings (maximum head count minus current head count) for that position number.

If you select the Allow Duplicates check box on the Create Job Openings from Positions page, the system creates a job opening for all open positions, regardless of whether a job opening for a position already exists.

If you deselect the Allow Duplicates check box on the Create Job Openings from Positions page, the system checks to see if a job opening already exists for each position number. If a job opening already exists for a position number, the system creates a new job opening only if the number of open positions (maximum head count minus current head count) is greater than the number of target openings on the Job Opening page for the existing job opening. For example, if a position has five openings and a job opening already exists for that position with a target opening value of two, the system creates one new job opening with three as the target opening value.

The system uses the position data along with the segmenting type that is specified in the Template Segmenting Type field on the Recruiting Installation - General page to select a recruitment template for each job opening. Because position data can be different for each position, the system could potentially use a different recruitment template for each job opening that it creates.

When you run the process, you must specify an originator. The originator appears in the Created By field on the Job Opening page, and will have access to the job openings after the system creates them. After the process completes, the originator will be able to access the new job openings through existing recruiting components, complete the necessary data entry—for example, screening, posting, and approval information—and submit the job opening for approval or save as normal, depending on whether the system requires approval for standard requisitions job openings.

Note. The user must also have the HCCPRS0000 permission list to access the page where you run the Create Job from Position process.

See Appendix B, "Delivered Permission Lists and Roles for Talent Acquisition Manager," page 759.

Page Used to Create Job Openings from Positions

Page Name	Definition Name	Navigation	Usage
Create Job Openings from Positions	HRS_RUN_CR_JOB	Recruiting, Administration, Create Openings from Positions, Create Job Openings from Positions	Create job openings from open positions.

Creating Job Openings from Open Positions

Access the Create Job Openings from Positions page (Recruiting, Administration, Create Openings from Positions, Create Job Openings from Positions).

Create Job Openings from Positions				
Run Control ID: PS		<u>Report Manager</u>	Process Monitor	Run
Run Options				
Allow Duplicates				
Originator: KU0007	Betty Locherty			

Create Job Openings from Positions page

Allow Duplicates Select to have the system create job openings for all position openings, regardless of whether a job opening already exists for a position. Deselect this option if you do not want the system to create duplicate job openings. By default, this option is deselected.

OriginatorSelect the ID of the person that you want to be the originator of the new job
openings. The originator appears in the Created By field on the Job
Opening page, and will have access to the job openings after the system
creates them. By default, the system populates this field with the current
user's ID.RunClick to access the Process Scheduler Request page, where you initiate the
process.

Approving Job Openings

This section provides an overview of job opening approvals and discusses how to:

- View pending approvals.
- Approve a job opening.
- Add another approver or reviewer.

Understanding Job Opening Approvals

Recruiting Solutions uses the *JobOpening* approval process definition, created in the Approval component (PTAF_TXN), to manage approval processing for job openings.

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Approvals," Setting Up Approval Process Definitions.

Approval Activation

To activate approval processing for job openings, use the check boxes in the Approvals Required group box on the Recruiting Installation - General page. There are separate check boxes for standard requisitions and continuous job openings; select the check boxes for the types of job openings that require approval.

Approval Statuses

This section refers to specific job opening statuses that are applied during approval processing. These references assume that you are using the delivered status configuration for job openings.

If you have changed this configuration, the system uses the statuses that you have defined for each stage of the approval process.

See Chapter 4, "Setting Up Recruiting Statuses," Recruiting Status Setup, page 36.

Approver Actions

When a recruiter creates and submits a job opening, the system checks whether approval is required for that job opening type. If approval is required, the system initiates the approval process.

Approvers can take action on the request in the Pending Approvals component or on the Approvals tab of the Job Opening page. The notification that the system sends to approvers includes a direct link to the Job Opening page.

Additionally, when a user searches for Pending Approval job openings on either the Find Job Openings and Browse Job Openings, approvers or recruiting administrators can select one or more pending job openings from the search results and act on the approval request using the Select Action field.

Important! If a user other than the assigned approver, that approver's proxy, or a recruiting administrator initiates an approval-related action on the Find Job Openings page or the Browse Job Openings page, the action will *not* update the job opening.

Approvers can also add additional approvers or reviewers to an individual job offer by clicking on the Insert Approver icon on the Manage Applicants - Disposition Details page and entering information for the additional approver or reviewer on the Insert additional approver or reviewer page.

Approvers have the option of either:

• Approving the job opening.

The system records the approval and notifies the next approver, if any. When the final approver approves the job opening, the system sets the job opening status to *Open*.

• Denying the job opening.

The system sets the job opening status to *Denied*, stops the progress of the job opening, and notifies the hiring manager. However, the originator of the job opening can later resubmit the job opening.

• Pushing back the job opening.

The system notifies the previous approver that the job opening has been pushed back and needs his or her attention.

Pushing back a job opening takes a currently pending step out of pending status and requeues the previous step to its approvers. The purpose of push back is to question the prior step's approval and request clarification. Because push back only makes sense if there is a previous approver, the first approver cannot push back.

Note. The job opening approval process does not support self-approval. The system always treats the primary hiring manager as the requester, regardless of who actually creates the job opening. Therefore, if the primary hiring manager's supervisor (the first approver) creates the job opening, the system does not recognize that the requester is also the approver.

The Delivered Two-Step Job Opening Approval Process

The delivered approval process for job openings requires two approvers:

1. The first approver is the supervisor of the person or persons entered as the primary hiring manager on the Job Opening page.

To identify the supervisor, the system uses the Target Information page.

2. The second approver is the recruiter or recruiters entered as the recruiter for the job opening.

This is how the delivered two-step job opening approval process works:

1. A recruiter, also known as the originator, creates a job opening and submits it.

The system sets the job opening status to *Pending Approval*. The system also identifies the first and second approvers and displays the Job Opening - Approval page that summarizes who is in the two-step approval process.

2. The system notifies the first approver.

The first approver is the supervisor of the person entered as the primary hiring manager on the Job Opening page. If there is more than one hiring manager and none is marked as primary, or if there is no hiring manager, then the first approval step is skipped. To identify the supervisor of the hiring manager, the system uses the Target Information page.

Note. If the supervisor of the primary hiring manager is inactive, the system checks the level up to find the supervisor of the inactive employee.

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Self-Service Transactions," Setting Up Access to Direct Reports Data.

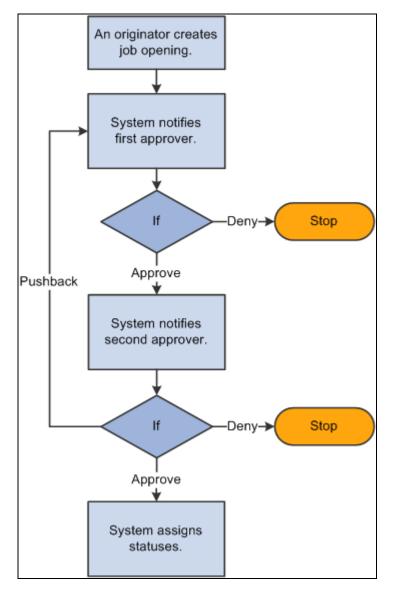
3. If the first approver approves the job offer, the system notifies the second approver.

The second approver is the primary recruiter for the job opening.

If there is no primary recruiter, the system routes the approval request to the Recruiting Solutions Approval Administrator.

4. If the second approver approves the job opening, the system updates the status of the job opening to Open and ends the approval process.

This diagram shows the delivered two-step approval process during which two approvers sequentially approve or deny a job opening.



Delivered two-step approval process for job openings

Changes to Job Opening Data During Approval Processing

While the job opening is in the approval process, information on the job opening can be changed. However, changing the data in specific fields before the job opening has reached final approval causes the system to start the approval process over. A notification is sent to the first approver and the approval process begins again.

Note. Changes to an approved and posted job opening do not have to be approved again.

The fields that can cause a trigger to occur are:

- Target Openings.
- Job Code.
- Position Number.

- Salary Administration Plan.
- From Salary Grade.
- To Salary Grade.
- Full-time/Part-time.
- Regular/Temporary.
- Standard Hours.
- (USF) Recruitment Type.
- (USF) Area of Consideration.
- (USF) Salary Range From.
- (USF) Salary Range To.
- (USF) Pay Frequency.
- (USF) Citizenship Status.

Approval Delegation

If you enable delegation for job opening approval, approvers can delegate approval authority to proxies for specified amounts of time. The system gives the proxy access to the Pending Approvals component, which displays the job openings for which approval has been delegated.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Self-Service Transactions," Setting Up Access to Direct Reports Data

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Approvals"

Chapter 12, "Understanding Approval Delegation in Talent Acquisition Manager," page 223

Pages Used to Approve Job Openings

Page Name	Definition Name	Navigation	Usage
Pending Approvals	HRS_RECRUIT_CONSOL	Recruiting, Pending Approvals, Pending Approvals	View pending approvals and approve job openings.
Job Opening page: Approvals tab	HRS_JOB_OPENING	Click the subject link on the Pending Approvals page.	Approve a job opening or add approvers or reviewers to the approval process.

Page Name	Definition Name	Navigation	Usage
Insert additional approver or reviewer	NA	 Click the Insert Approver icon on the Job Approvals page. Click the Insert Approver icon on the Disposition Details page. 	Add approvers or reviewers to the approval process.

Viewing Pending Approvals

Access the Pending Approvals page (Recruiting, Pending Approvals, Pending Approvals).

Pe	Pending Approvals				
Pe	ending App	rovals		Customize View All 🖪 First 🚺 1-3 of 3 🕨 Last	
	ID Nbr	Sender	Received	Subject	
	300162	Ponciano Batalang	05/20/2009	Job Approval:Guest Manager	
	500410	Ponciano Batalang	06/12/2009	Job Approval:Operator-Computer	
	10261	Betty Locherty	05/20/2009	Offer Approval:Elfrieda Penner	
Se	Select All Deselect All Select Go				

Pending Approvals page

To approve or deny multiple pending approvals, select the check box for the job openings and job offers that you want to approve or deny, select *Approve* or *Deny* from the Select field and click Go. The system approves or denies the selected pending approvals and removes them from the page.

SubjectClick a job approval link to access the Job Opening page, where you can
view details for and approve the job opening.

Click an offer approval link to access the Manage Applicant - Disposition Details page, where you can view details for and approve a job offer.

Approving Job Openings

Access the Job Opening page: Approvals tab (click the subject link for a job approval on the Pending Approvals page).

Find Job Opening
Job Opening
Posting Title:Administrative AssistantJob Opening ID:503718Job Opening Status:006 Pending ApprovalJob Type:StandardJob Title:Assistant-AdministrativeJob Code:170005Position Number:1900018 Administrative AssistantStandardBusiness Unit:GBIBU Global Business Institute BUStandardJob Family:KADMIN Administrative SupportStandard
Save Clone Create New Previous Job Opening Next Job Opening Job Opening List Job Details Qualifications Screening Job Postings Hiring Team Approvals
Supervisor/Recruiter Grp Aprv Job Opening:Pending Request Information
Route to Supervisor/Recruiter Approved Test User: HCQAN-MSPVR Hiring Manager Posn Supervisor 01/16/12 - 1:00 PM Pending Test User: HCQAN-R Recruiter Group
Approve Pushback Deny Comments Text:

Job Opening page: Approvals tab

Note. The Approvals tab appears on the Job Opening page only after the job is submitted for approval.

Job Opening: <Approval Status>

This group box displays a graphical representation of the approval process. There is a box for each approver. The box title shows the approver's status, while the box contents include the approver's name, the approver's role in the approval process (for example, the hiring manager's supervisor), and the date, if any, when the approver took action on the approval request.

Additional graphical elements in this group box include color-coding the approver boxes according to the approver's status, and status icons next to the approver's user ID.

<approver id="" user=""></approver>	Click the approver's user ID to display additional information about the approver.
÷	Click to add another approver or reviewer. A secondary page appears, where you select a user ID and indicate whether you are adding an <i>Approver</i> or <i>Reviewer</i> .

Approval Controls for Assigned Approvers

The following buttons are visible only to the current approver.

Approve	Click to approve the job opening. When final approval is reached the system changes the job opening status from <i>Pending Approval</i> to <i>Open</i> .
Pushback	This is available only to approvers other than the first approver. Click to send a notification to the previous approver telling them the job opening needs to be changed.
Deny	Click to reject the job opening and set the job opening status to Denied.

Approval Control for Administrators

StatusWhen an administrator views the approval chain, the buttons that the
assigned approvers use are not visible. Instead, there is a Status drop-down
list box that the approver can use to override the approval process. The
administrator can select either All Approved or Denied. The override takes
effect when the administrator saves the job opening.After an administrator overrides the approval process, the approval process
status is Terminated, regardless of whether the administrator approved or
denied the job opening.

Adding Another Approver or Reviewer

Access the Insert additional approver or reviewer page (click the Insert Approver icon on the Job Approvals page or on the Disposition Details page).

Insert additional approver or reviewer			
Choose ar	approver or reviewer to insert		
User ID:	Q		
Insert as:	• Approver		
	C Reviewer		
Insert	Cancel		

Insert additional approver or reviewer page

User ID	Select the user ID of the person that you want to add.			
Insert as	Specify whether this user is added as an approver or reviewer.			

Chapter 14

Managing Job Postings

This chapter discusses how to:

- Build the job posting collections.
- Search for job postings.
- Manage external job postings.
- Post job opening to PeopleSoft Services Procurement

Building the Job Posting Collections

This section provides an overview of the job posting collections and discusses how to build them.

Understanding the Job Posting Collections

Run the Verity Job Posting Index Build (HRS_JSCH_IDX) Application Engine process to build the search collections that applicants and recruiting users use to search for job postings. Because job openings and job postings are always being added to the system, you must continually build the collections to keep them up to date.

The Verity Job Posting Index Build process creates two collections:

- The job posting collection.
- The job opening profile collection.

The Job Posting Collection

The job posting collection includes job opening and posting data, and it contains job profile items as text (for example *CIRM Integrated Resource Management* within the content section *LIC* (licenses).

The job posting collection is used by searches on these pages:

• The Job Search page in Candidate Gateway, where applicants search for job postings that interest them.

Applicants can use either a basic search (a simple keyword search) or an advanced search that enables them to add specific search criteria such as their desired pay.

See *PeopleSoft Candidate Gateway 9.1 PeopleBook*, "Using Candidate Gateway," Reviewing and Searching for Job Postings.

 The Search Postings – Basic Search page, which Talent Acquisition Manager users use to manage job postings.

See Chapter 14, "Managing Job Postings," Searching for Job Postings, page 334.

The Job Opening Profile Collection

The job opening profile collection contains job opening profile data (such as competencies). It contains codes within a dynamically generated nested structure representing different profile attributes: for example, N within the item property JPM_YN_2 within the content item *ITEM_CIRM* within the content section *SECTION_LIC*.

The system uses this collection when performing searches that compare profiles. Profile match searching is available on these pages:

• Internal applicants use the Job Openings That Match Your Profiles page in Candidate Gateway to search for job openings that match one of the employees' own person, job, or interest profiles.

Profile searching is not available to external applicants.

See *PeopleSoft Candidate Gateway 9.1 PeopleBook*, "Using Candidate Gateway," Performing a Profile Search.

• Recruiters use the Recruitment Profile Match page to match profiles of various types, including job opening profiles.

For example, recruiters can search for employees or applicants with profiles that match a job opening profile, or they can search for job postings that match a particular applicant or employee profile.

See Chapter 16, "Searching for Applicants," Performing Profile Searches, page 416.

Note. The Verity Job Posting Index Build process creates this collection only if profile utilization is active (on the Recruiting Installation - General page, the Allow Profile Utilization field value is *Yes.*)

Job Openings That Are Indexed

Although the data in these collections comes from the entire job opening rather than from just the job posting, these collections are called the job posting collections because they include only data from posted job openings.

The job posting collections includes only job openings that:

- Have an open status.
- Have been posted internally or externally to a destination that is a Company recruitment source type.

If the posting includes a posting date, it is considered to be posted only on or after that date.

See <u>Chapter 11, "Setting Up Recruitment Sources," Setting Up Recruitment Sources, page 212</u> and <u>Chapter 13, "Creating Job Openings," Creating Job Postings, page 306.</u>

Page Name	Definition Name	Navigation	Usage
Build Job Index	HRS_JSRCH_RUN_PROC	Recruiting, Administration, Build Job Index, Build Job Index	Build the job posting collection and the job opening profile collection by running the Verity Job Posting Index Build (HRS_JSCH_IDX) Application Engine process. Note. The job opening profile collection is created only if profile utilization is active.

Page Used to Build the Job Posting Collections

Building the Job Posting Collections

Access the Build Job Index page (Recruiting, Administration, Build Job Index, Build Job Index).

Build Job Index				
Run Control ID: PS		Report Manager	Process Monitor	Run
Job Posting Search Collection				
 Create New Collection Update Existing Collection 	Open Date From:	31		
Return to Search				

Build Job Index page

Create NewSelect this option to build new collections. The new collections includes job
openings that have been opened or since the date that you enter in the Open
Date From field.Update ExistingSelect this option to add, update, and delete entries in the existing
collections.

Open Date FromWhen the system builds or updates the job posting collections, it includes
job openings that were opened on or since the date you enter in this field. If
you leave this field blank, the collection includes all job openings that:• Have an open status.• Have been posted internally or externally to a destination that is a
Company recruitment source type.

If the posting includes a posting date, it is considered to be posted only on or after that date.

Searching for Job Postings

This section provides an overview job posting searches and discusses how to:

- Perform basic job posting searches.
- Perform advanced keyword searches.

Note. This section does not discuss profile match searches (searching for job opening profiles that match other types of profiles) or the additional collections that you need to build to perform these searches. Profile match searches are part of the Find Applicants component.

See Chapter 16, "Searching for Applicants," Performing Profile Searches, page 416.

Understanding Job Posting Searches

To search for job postings, use the Search Postings - Basic Search or the Advanced Keyword Search pages. Use these pages to find open job postings whose job posting titles or descriptions match the criteria you entered.

Job posting searches are only as current as the data in the search collections. Since job openings are continually being added to the database, you must frequently build the job collections to keep them current.

Prerequisites

Before you can search for job posting, build the job posting collections.

See Chapter 14, "Managing Job Postings," Building the Job Posting Collections, page 331.

Page Name	Definition Name	Navigation	Usage
Search Postings - Basic Search	HRS_REC_SCHJOB	Recruiting, Postings, Search Postings, Basic Search	Define basic criteria for job posting searches.
Advanced Keyword Search	HRS_REC_SCHJOB	Click the Advanced Search link on the Search Postings - Basic Search page.	Define additional criteria for job posting searches.
View Job Posting	HRS_REC_JBPST	Click the posting title link in the Search Results group box on the Search Postings - Basic Search page.	View job posting details.

Pages Used to Search for Job Postings

Performing Basic Job Posting Searches

Access the Search Postings - Basic Search page (Recruiting, Postings, Search Postings, Basic Search).

Basic Search				
 View Basic Search criter 	ia			
Search For: Customer	Representative)	Posted Within:	
Search Advanced Sear	rch Search Tip:	<u>s</u>		
3 Results Found				
Search Results				
Result		Cus	stomize Find View A	All 🖾 First 🗹 1-3 of 3 🖸 Last
Posting Title	Job ID	Туре	Location	Hiring Manager
Customer Representative	<u>30016</u>	E	Oklahoma	Patrick Seto
Customer Representative	<u>30016</u>	I	Oklahoma	Patrick Seto
Customer Representative	<u>503730</u>	E	Oklahoma	
<u>Manage Job Postings</u>				

Search Postings - Basic Search page

Keyword Search

Search For

Enter the words that you want to search for in the job postings. These words are compared to the job posting title and description.

Posted Within	Select the time period to search. Only job postings that were posted during the specified time period are included in your search results.		
	Options are:		
	• Anytime		
	Last Week		
	Last Month		
	Last Three Months		
	• Last Year		
Search Results			
Posting Title	Click link to access the View Job Posting Details page.		
Job Opening ID	Click link to access the Job Opening page.		

Defining Advanced Keyword Searches

Access the Advanced Keyword Search page (on the Search Postings - Basic Search page, click the Advanced Search link).

Advanced Keyword Search
Enter Advanced Search Criteria
Search Reset Search Basic Search Search Tips
Enter Keywords: Customer Representative
Job Family:
Posted Within:
Recruiting Location:
Country:
Full/Part Time:
Regular/Temporary:
Desired Annual Pay:
Search Reset Search Basic Search Search Tips
Manage Job Postings

Advanced Keyword Search page

Enter Keywords	Enter the words that you want to search for in the job posting. These words are compared to the job posting title and description.		
Job Family	Select a job family.		
Posted Within	Select the time period to search. Only job postings that were posted during the specified time period are included in your search results.		
	Options are:		
	Anytime		
	• Last Week		
	Last Month		
	Last Three Months		
	• Last Year		

Recruiting Location	Select a recruiting location. The system compares this to the Recruiting Location on the job opening.
Country	Select a country. The system compares this to the Country field on the job opening.
Full/Part Time	Select either full-time or part-time. The system compares this to the Full/Part Time field on the job opening.
Regular/Temporary	Select either regular or temporary. The system compares this to the Regular/Temporary field on the job opening.
Desired Annual Pay	Enter an amount and select a currency code.

Managing External Job Postings

This section provides an overview of external job postings and discusses how to:

- Post, update, and unpost external job postings.
- Review external job posting transaction history.
- Review the integration log.

Understanding External Job Postings

The Manage External Postings (HRS_EXTPOST) component enables you to post, update, or unpost job postings from job boards, recruitment agencies, or service procurement providers.

Pages Used to Manage External Job Postings

Page Name	Definition Name	Navigation	Usage
Manage External Postings	HRS_EP_STATUS	Recruiting, Postings, Manage External Postings, Manage External Postings	Post, update, and unpost external job postings. Also, review history of postings.
External Posting History	HRS_EP_HISTORY	Select <i>History</i> from the Action column in the Search Results group box on the Manage External Postings page.	Review external job posting transactions history.

Page Name	Definition Name	Navigation	Usage
Open Integration Framework - Integration Log	HRS_HROI_LOG	Set Up HRMS, Product Specific, Recruiting, Integration, Integration Log, Open Integration Framework - Integration Log	Review the transactions.

Posting, Updating, and Unposting External Job Postings

Access the Manage External Postings page (Recruiting, Postings, Manage External Postings, Manage External Postings).

Job Bo	Job Boards							
Mana	Manage External Postings							
🔻 Searc	h							
Job Ope	ening:	Q						
Status:		•						
Source:	Services Procurement	•						
Date Typ	pe:	•						
Start Da	te:							
End Date	e: 31							
	Data changed since last update	ite						
Sear	ch							
Search	Results				Customize	Find 🗖	First 🚺 1-3 of	f 3 🕨 Last
Select	Job Opening	Source	Status	Post Date	Remove Date	Changed	Action	
	Analyst-Business-30005	Services Procurement	New	05/12/2004		Yes	•	Go
	Contingent Analyst-Business-30005	Services Procurement	New	07/01/2004		Yes	•	Go
	Administrator-120010-503711	Services Procurement	New	08/19/2009		Yes		Go
Group Ac	Group Action: Go							

Manage External Postings page

Search Results

Posting Title

Click the posting title link to access the Job Opening page.

Action	Select the action that you want to send to the destination source and then click Go. Options are:
	• <i>History:</i> Select to access the External Posting History page, where you can review the transactions history for the external job posting.
	• <i>Post:</i> Sends the post request message. The status of the corresponding job is updated to Unconfirmed Post until the destination responds.
	• <i>Update:</i> As time goes by, the information associated to posted job openings may change. For example, perhaps the number of openings has increased or decreased. The job board where these jobs are posted are not automatically updated. The update action sends the update request message that will update the job board with the latest posting information. The status of the corresponding posting is not changed.
	• <i>Unpost:</i> Sends the unpost request message. The status of the corresponding posting is changed to <i>Unconfirmed Unpost</i> until the job board responds.

Reviewing External Job Posting Transaction History

Access the page External Posting History page (on the Manage External Postings page, select *History* from the Action column in the Search Results group box).

Job Boards	Job Boards				
External Po	sting Histo	ry			
Job Opening ID:	503710				
Posting Title:	JOB - 170030				
Source:	MOIN TAM_SPro	Integration			
Status:	Unconfirmed Pos	st			
Post Date:	08/18/2009				
Remove Date:					
Transactions			Customize Find 🗖	First 🗹 1-4 of 4 🖸 Last	
Transaction Name	Result	Description	Last Updated	Integration Log	
JobBoardPost	Redirected		08/19/2009 12:21PM	Integration Log	
JobBoardPost	Redirected		08/19/2009 4:20PM	Integration Log	
JobBoardPost	Redirected		08/19/2009 4:21PM	Integration Log	
JobBoardPost	Redirected		08/19/2009 4:27PM	Integration Log	
Action:	Go				
Return					

External Posting History page

Transactions

Transaction Name	Displays the incoming or outgoing message.
Action	Displays the results of the message.
Description	Displays a description of the action.
Last Updated	Displays the date and time when the outgoing and incoming messages were sent and received.
Integration Log	Click this link to access the Open Integration Framework - Integration Log page, where you can view detailed information about the transaction

Reviewing the Integration Log

Access the Open Integration Framework - Integration Log page (Set Up HRMS, Product Specific, Recruiting, Integration, Integration Log, Open Integration Framework - Integration Log).

Open Integratio	on Framework			
Integration	Log			
👻 Search Integrati	on Log			
Status:		¥		
Vendor:		•		
Transaction ID:		•		
Last Updated From	m: 🛐	To:		
Search				
Search Results			Customize Find View All 🔄	First 🚺 1 of 1 🚺 Last
Transaction	Transaction Type	Vendor	Last Updated	Status
JobBoardPost	OutSync	MOIN - TAM_SPro Integration	08/19/2009 12:21PM	Succeeded
Return				

Open Integration Framework - Integration Log page

The system displays a list of all open integration framework transactions. In the search results, a link in the Transaction column enables you to view the actual XML that is generated by the transaction.

Posting Jobs to PeopleSoft Services Procurement

This section provides an overview of integration with PeopleSoft Services Procurement and discusses how to post jobs to PeopleSoft Services Procurement.

Note. The *PeopleSoft Services Procurement PeopleBook* provides the technical details of the integration between Talent Acquisition Manager and PeopleSoft Services Procurement. This section focuses on the business process flow for using PeopleSoft Services Procurement to fill job openings.

Understanding Integration With PeopleSoft Services Procurement

Oracle delivers prebuilt integration points that enable you to:

• Use PeopleSoft Services Procurement to search for contingent workers to fill job openings in Talent Acquisition Manager.

• Use PeopleSoft Human Recourses as your system of record for contingent workers who are brought in to fill PeopleSoft Services Procurement requisitions.

Note. The use of PeopleSoft Human Resources as your system of record for PeopleSoft Services Procurement contingent workers is available regardless of whether you use PeopleSoft Services Procurement to fill Talent Acquisition Manager job openings. This section, however, discusses the integration that occurs when you use all three systems.

Integration Process Flow

When you integrate with PeopleSoft Services Procurement, you set up Services Procurement as a posting destination for job openings. Posting a job to Services Procurement initiates this sequence:

- 1. Talent Acquisition Manager sends the posting data to Services Procurement.
- 2. Services Procurement uses this data to create a corresponding requisition.
- 3. When Services Procurement identifies a candidate for the requisition, the candidate information is sent to Talent Acquisition Manager.
- 4. Talent Acquisition Manager creates an applicant record.

Note. If PeopleSoft Services Procurement previously sent the same candidate to Talent Acquisition Manager, then Talent Acquisition Manager is able to match the candidate information to the existing applicant record. Talent Acquisition Manger does not, however, attempt to match new candidate data to existing applicant records.

5. Talent Acquisition Manager links the candidate's applicant record to the job opening.

The initial disposition for the newly linked applicant is *Offer Accepted*, however, there is no actual offer associated with the applicant. This default disposition ensures that the applicant is ready for hire processing.

When the applicant is linked to a job opening, Talent Acquisition Manger also notifies the recruiter of the newly linked applicant. This notification is in addition to any status change notifications that are active in the system.

6. If the Services Procurement candidate is selected, the recruiters initiates the prepare for hire process in Talent Acquisition Manager.

If a different applicant is hired, the Services Procurement candidate's disposition changes according to the status change rules (for example, to *Reject - Another Applicant Was Hired*), and the system sends a message to Services Procurement cancelling the work order.

7. PeopleSoft Human Resources receives a hire request from Talent Acquisition Manager, and the HR user completes the hiring process.

If the applicant is withdrawn from hire (using the *Withdraw from Hire* action in Talent Acquisition Manager), Talent Acquisition Manager sends a Services Procurement indicating that the candidate has been withdrawn and that Services Procurement can cancel the work order.

8. When the hire process is complete, PeopleSoft Human Resources sends employee data (such as the employee ID and record number) back to Talent Acquisition Manger.

9. Talent Acquisition Manager, in turn, sends the employee data to Services Procurement.

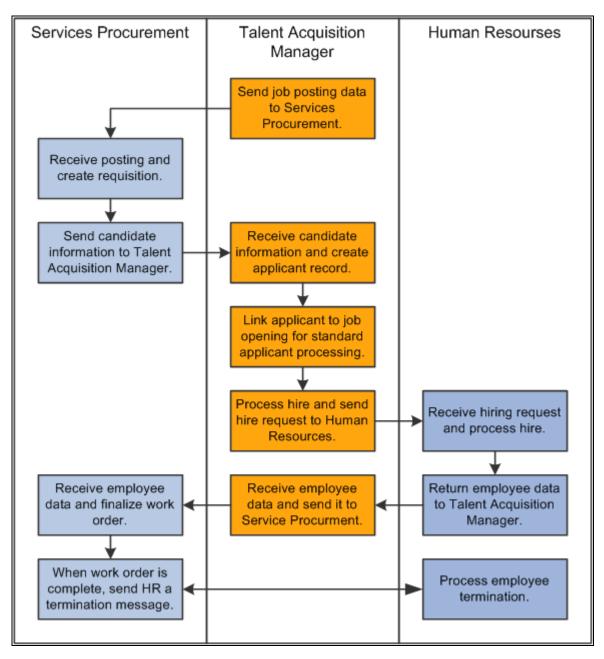
Note. When Services Procurement receives the employee data, it sends a request to Human Resources to create a user profile for the new candidate, and Human Resources processes the request and creates the user profile. This occurs because the Human Resources system is considered the master in this integration, and all user profiles must be created in Human Resources and synched to Services Procurement, which requires applicants to have a user profile so that they can sign into Services Procurement to enter time sheets.

10. Services Procurement uses this information to update the work order and to associate the HR employee data with the Service Procurement candidate record.

Having the HR employee data enables Services Procurement to communicate directly with Human Resources when it's time to terminate the employee.

11. When the service provider has completed the project and the work order is closed, terminated, or cancelled, Services Procurement sends a terminate message directly to PeopleSoft Human Resources

The following diagram illustrates these steps:



Process flow for integration with PeopleSoft Services Procurement

Data Sent to Services Procurement

When you post a job to PeopleSoft Services Procurement, the message that Talent Acquisition Manager sends to Services Procurement includes (but is not limited to) these data elements:

• A job posting ID that is used as the unique identifier.

In the Services Procurement system, this ID goes into a field whose name suggests that this is the job opening ID, but it is not the job opening ID.

- The beginning date and ending date of the posting.
- The job family, which is equivalent to the *service type* in PeopleSoft Services Procurement.

- The job code, which is equivalent to the *service* in PeopleSoft Services Procurement.
- The pay frequency for the job openings, which is equivalent to the *unit of measure* in PeopleSoft Services Procurement.

Although this is not a required field in Talent Acquisition Manager, it is required for jobs that are posted to PeopleSoft Services Procurement. If the pay frequency is missing when a user attempts to post the job, the system displays an error.

- The subset of job qualifications (such as competencies and experience) for which there are data mappings to the Services Procurement system.
- The user ID of the person who posted the job.

This user ID *must* also exist in PeopleSoft Services Procurement. This user ID is used to create and immediately display the Services Procurement work order when a job is posted.

Posting Jobs to PeopleSoft Services Procurement.

To post a job to PeopleSoft Services Procurement:

1. On the Job Opening page: Job Details tab: Job Postings section, create a job posting and select *Services Procurement* as the posting destination.

See Chapter 13, "Creating Job Openings," Adding Job Posting Details and Destinations, page 308.

2. On the Manage External Job Postings page, select the *Post* action for the posting, then click the Go button to send the posting message.

The system processes the message and immediately opens the Create Requisition page in PeopleSoft Services Procurement.

See Chapter 14, "Managing Job Postings," Managing External Job Postings, page 339.

3. Review and, if necessary, modify the requisition then submit it.

The recruiting user is responsible for submitting the Services Procurement requisition and therefore must be a user of both systems.

Once the requisition is submitted, the PeopleSoft Services Procurement fulfillment process begins.

See PeopleSoft Services Procurement PeopleBook

Chapter 15

Entering Applicant Data

This chapter provides overviews of applicant records and of profile information in job applications. It then lists common elements used on applicant data pages and describes how to:

- Enter contact information.
- Enter job applications.
- Enter references.
- Enter applicant eligibility and identity information.

Understanding Applicant Records

This overview discusses:

- Applicant record creation.
- Applicant data.
- Job applications.

Applicant Record Creation

There are four ways that applicant records are created in the system:

• Recruiters, recruiting administrators, and managers use the Add New Applicant (HRS_ADD_APPLICANT) page to manually create a record.

This chapter discusses the Add New Applicant component.

• Applicants use Candidate Gateway to submit an application.

See PeopleSoft Candidate Gateway 9.1 PeopleBook, "Using Candidate Gateway," Applying for Jobs.

• Applicants send their resumes to an email address, and a third-party resume reader reads the resume text, converts the text to data, and creates the applicant record.

See Chapter 23, "Managing Resumes," Loading Resumes, page 686.

• Resumes that are received from third-party staffing suppliers (such as job boards and recruitment agencies) are processed through the Open Integration Framework.

See Chapter 23, "Managing Resumes," Open Integration Framework, page 682.

Note. Use the Manage Applicant component to view and update applicant data, regardless of how that data entered the system. On the Manage Applicant page, the Applicant Data tab provides the same sections as the Add Applicant page.

See Also

Chapter 22, "Managing Applicants," Reviewing Applicant Data, page 624

Applicant Data

On the Add New Applicant page (and on the Manage Applicant page: Applicant Data tab), applicant data is organized into four sections:

- Contact details.
- Applications.
- Verification.
- Eligibility & Identity.

Contact Details

Contact details include basic identifying information about the applicant along with the applicant's name, address, email addresses, and phone numbers.

Note. You must enter and save the applicant's first and last name before you can access the Applications section of the applicant data.

The Contact Details section is also where you specify the applicant type:

- *External:* The applicant has never worked for your organization.
- *Employee:* The applicant is a current employee.
- Non-employee: The applicant exists in your system, but as a person of interest rather than as an employee.

If you select an existing employee ID to associate with the applicant, the system uses that information to set the applicant type to either *Employee* or *Non-employee*. If you clear the employee ID, the system changes the employee type to *External*.

When you select an employee ID, the system copies employee data into corresponding fields in the applicant record. Copied data includes personal information, eligibility & identity information, and profile information. The profile data is part of the job application; access the Applications subsection and then view the job application to review the profile data.

See Chapter 15, "Entering Applicant Data," Profile Data for Internal Applicants, page 353.

Applications

The Add New Applicant page does not display the Applications subsection until you save the record with at least a first name and last name.

You can create an unlimited number of job applications for an applicant. Each application can be linked to a different job opening, or to no job opening.

See Chapter 15, "Entering Applicant Data," Job Applications, page 351.

Verification

Use the Verification section of the applicant data to review and add references for the applicant.

Also, if the applicant data includes an email address, you can use this section to request references. The system sends an email to the applicant and, for Candidate Gateway users, places a reference request notification in the notifications section of the Careers Home page in Candidate Gateway. A request for references does not create a contact note; no history of requests is maintained.

Eligibility & Identity

Enter eligibility and identify information as required by your organization or to comply with local or country regulatory requirements. Eligibility and identity information includes, but is not limited to, data such as:

- National IDs
- Citizenship
- Visa and work permits
- Bank accounts
- Disabilities
- Accommodation requests and options
- Country-specific data.

Job Applications

An applicant can have an unlimited number of job applications. Each application can be linked to one or more specific job openings, or to no job opening.

The application form includes these sections:

• Resumes.

This section can include a resume attachment or resume text that is entered directly in the system (either on this page or in Candidate Gateway). Rich text editing is available for formatting resume text.

• Attachments

You can add cover letters, transcripts, references, or any other attachments that are relevant to the job application.

• Preferences, including job openings.

General preferences include information such as the employee's preferred start date and schedule, willingness to relocate or travel, geographic preferences, salary requirements, and shift preferences.

Job preferences can include preferred job families or specific job openings. Including a specific job opening on the application links the applicant is linked to the job opening. If you use the delivered status rules, the applicant's initial disposition for the job opening is *Applied*.

• Personal information.

Personal information includes a disability code, eligibility to work in the U.S., and information about previous employment with your organization. The system does not verify any of this data.

• Referral source.

Applicant who are referred by employees can identify the referring employee.

• Work experience.

Required data for each work experience entry includes the employer name, the employment start and stop date, and the ending job title. Additional fields capture salary information, the employer's phone number and address, and any freeform comments.

• Education level.

This is a single entry for the applicant's highest education level. If you want details about the applicant's degrees, areas of study, or other education background, use the appropriate profile content type.

• Qualifications (profile content types).

The Application Data page includes a grid for every content type in the system's primary person profile. Use these grid to add specific content items to the application.

Examples of delivered content types include competencies, degrees, licenses and certifications, and language skills.

• (USF) Priority placement.

Priority placement entitles the applicant to certain preferential consideration during the screening process.

See Chapter 5, "Setting Up Screening Processes," (USF) Setting Up Preference Programs, page 83.

• (USF) Federal preferences.

Use this section to record additional federal preference information

Note. When you enter application data using the Add New Applicant page in PeopleSoft Talent Acquisition Manager, you use a single page that includes all possible sections. When applicants apply using Candidate Gateway, the organization and presentation of the application data fields is different, and applicants do not necessarily see all of the sections or all of the profile content types that appear on the Add New Applicant page.

See Also

Chapter 9, "Setting Up Recruiting Templates," Understanding Resume Templates, page 133

PeopleSoft Candidate Gateway 9.1 PeopleBook, "Using Candidate Gateway," Applying for Jobs

Understanding Profile Information in Job Applications

This section discusses the use of profile information in job applications.

Profile Architecture

Profiles describe the attributes of jobs or individuals. In PeopleSoft Human Resources, you use the Manage Profiles business process to set up *content types* for a profile. Content types are categories of person or job attributes. For example, Oracle delivers content types for competencies, degrees, licenses & certifications, and many other attributes that are relevant to recruiting.

Content items are the specific attributes that the person or job has—that is, the specific competencies, degrees, and so forth.

Optional *Instance Qualifiers* provide logical groupings for content items. For example, competency ratings use the evaluation type as an instance qualifier. This enables the system to differentiate between self-evaluations, manager evaluations, peer evaluations, and so forth. Profile settings determine which types of evaluations are visible to employees and which types can be updated by employees.

The content types that are available for use in PeopleSoft Talent Acquisition Manager are those that belong to the primary person profile type as defined on the Assign Profile Type Defaults page. Only unsecured content types (those that everyone is allowed to see) are used.

Profile Data for Internal Applicants

Talent Acquisition Manager uses applicant profile information to capture the applicant's qualifications and skills and to match those to job openings, which also include profile information. The applicant's profile information is contained in the job application.

Because your employees already have profiles, the system copies employee profile data into the job applications that an internal applicant creates. The internal applicant can optionally modify the profile data in the application before submitting it.

Note. An employee can have multiple person type profiles. Talent Acquisition Manager uses only the profile with the primary person profile type. If the employee does not have this type of profile, no profile data is copied into the application.

When copying employee profile data into an application:

- The system imports only content items that are visible to employees.
- For content items that have instance qualifiers (such as the rating type for a competency rating), the system imports only those content items that have an instance qualifier that is visible to employees (for example, self-evaluations, but not peer evaluations).

- For content items that use the employee default instance qualifier (for example, self-evaluation), the system merges the content items from the employee profile and from the job opening qualifications.
- Only content items that have the employee default instance qualifier (for example, self-evaluation) are available for editing.

If the employee subsequently creates an additional application, the system pulls the employee data into the new application, and also adds any data from the most recently submitted application. This ensures that any new profile content that gets added to a job application gets carried through to the subsequent job applications. Note, however, that profile content that is manually removed from an application continues to appear in each new application as long as it is part of the employee's profile.

Changes to applications never get copied to the employee profile data. And after the system initially populates the profile data in a job application, changes to profile data in one application (or in the employee profile) do not affect any other applications.

See Chapter 3, "Setting Up Profile Integration," page 25.

Competency Evaluation Types in Job Applications

In job openings, content types represent desirable (or required) attributes for applicants. For many content types, the applicant either will or won't have the attribute.

Competencies present a more complex situation because they include a rating scale and an evaluation type. The evaluation type indicates who assigned the rating. When an employee submits an application and the employee's existing competency ratings are copied into the application, it is important that the employee not be able to modify ratings where the evaluation type is anything other than *Self*.

Profile architecture uses the concept of an *Instance Qualifier* to organize content types according to specified data. In the case of competencies, the evaluation type is the instance qualifier. The instance qualifier setup for competencies not only lists the evaluation types, it indicates which ones employees can view (for example, employees can view manager evaluations, but not peer evaluations), and which one is the default value for employees (for competencies, *Self* is the employee default).

Job applications handle content items with instance qualifiers according to these rules:

• When an internal applicant applies, only contents items that are visible to employees are copied from the employee's primary person profile into the job application, and only content items with the employee default instance qualifier are editable.

For example, an employee creates an application, and the system copies the employee's manager evaluations and self evaluations into the application. It does not copy peer evaluations. The employee can see both the manager evaluations and self-evaluations, but can only edit or add self-evaluations.

Note. If the applicant later submits an additional application, the content items are again copied from the primary person profile, and any additional content items that were added in the previous application are also carried over to the next application. The applicant's ability to add additional content items depends on the settings on the Content Section Configuration page.

• When an external applicant applies, instance qualifiers are not shown, but the employee default instance qualifier is assigned to any content items that the employee adds.

For example, an external applicant who adds a competency and rating to the application does not see that the rating is associated with the *Self* evaluation type.

Recruiting users can add content items with other instance qualifiers (for example, a competency rating with an *Executive Committee* evaluation type), but these content items are not visible to the applicant.

Common Elements on Applicant Data Pages

Applicant ID	This identification number is automatically assigned by the system when you first save the applicant record.
Add Applicant	Click this link to begin adding a new applicant record.
Manage Applicant Activity	Click this link to save the applicant data and then access the applicant's data in the Manage Applicant page. See <u>Chapter 22</u> , " <u>Managing Applicants," page 601</u> .

Entering Contact Information

This section discusses how to enter contact information.

Page Used to Enter Contact Information

Page Name	Definition Name	Navigation	Usage
Add New Applicant: Contact Details section Manage Applicant page: Applicant Data tab: Contact section	HRS_ADD_APPLICANT	 Recruiting, Add New Applicant, Add New Applicant Access the Contact Details section. Recruiting, Find Applicants, Find Applicants Click an applicant name to access the Manage Applicant page, then access the Applicant Data tab: Contact section. 	Enter contact information for an applicant.

Entering Contact Information Details

Access the Add New Applicant page: Contact Details section (Recruiting, Add New Applicant, Add New Applicant).

Add New A	pplicant
Applicant ID:	500184
Add Applicant	Save Manage Applicant Activity
Contact Details	Applications Verification Eligibility & Identity
Applicant Inform	ation
Empl ID:	*Applicant Type: External Applicant
*Status Code:	Active Status Reason:
Status Date:	08/04/2009 Preferred Contact: Not Specified
Name	
Name Format:	English
Name Prefix:	
*First Name:	Nora
Middle Name:	
*Last Name:	Massey
Name Suffix:	

Add New Applicant page: Contact Details section (1 of 2)

Address			
Country:	United	States	
Address 1:	123 Hil	Road	
Address 2:			
Address 3:			
City:	San Fra	ancisco	
State:	Califor	nia	
Postal:	94444		
County:			
Email Addres	ses		Customize Find 📮 🛗 First 🗹 1 of 1 🕨 Last
Preferred	Email Type	Email Address	
	Home 💌	nora.massey@email.com	1 🗍
+ Add Email A	Address		
Phone Numbe	ers Phone		Customize Find 🖾 🛗 First 🖸 1 of 1 🖸 Last
Preferred	Туре	Telephone	Extension Country Code
	Home 💌	415/999-9999	
+ Add Phone	Number		

Add New Applicant page: Contact Details section (2 of 2)

Applicant Information

Empl IDIf this is a current or former employee, or a person of interest, select the
employee ID. When you select an employee ID, the system copies
information from the PeopleSoft Human Resources tables and
automatically assigns the applicant type.Applicant TypeSelect the type of applicant. Values are *Employee,External Applicant*, and
Non-Employee. The default is *External Applicant*.

Status Code	Select a status code. This is the overall applicant status, not the applicant's disposition with regards to any particular job opening.		
	You can use the status values that are provided with the PeopleSoft system, or you can define your own status values and rules. As delivered, the statues are:		
	• <i>Active:</i> This is the default status for new applicants.		
	The system also assigns this status when an applicant's resume is in a Success status as part of the resume extraction process.		
	• <i>Hired:</i> The delivered status change effect rules ensure that the applicant's overall status is set to <i>Hired</i> when the applicant's disposition for a particular job opening changes to <i>Hired</i> .		
	• <i>Inactive:</i> Use this status for applicants that have withdrawn.		
	Under the delivered status change effects, when you change an applicant's status to <i>Inactive</i> , the applicant's disposition for any job openings that they have applied for is set to <i>Withdrawn</i> . The system excludes inactive applicants from job opening screening.		
	The system also assigns this status when an applicant's resume is in a Rejected status as part of the resume extraction process.		
	• <i>Queued:</i> The system assigns this status when an applicant's resume is in a Draft or Unresolved status as part of the resume extraction process.		
	A recruiter could also set this status on the Add New Applicant or Manage Applicant pages if they wanted to note that this applicant needs additional information to be collected or some other action before becoming an active applicant.		
Status Reason	Select a status reason. Define status reasons for status codes on the Statuses and Reasons page.		
Status Date	Enter a status date.		
	The date defaults to the system date and is used only for informational purposes. You can use this date for equal employment opportunity (EEO) reporting and other auditing functions.		
Preferred Contact	Select the preferred method of contact for the applicant. Values are: <i>EMail, Mail,Not Specified,</i> and <i>Phone.</i>		

Name

Use this group box to enter name information for the applicant.

Address

Use this group box to enter address information for the applicant. The fields that appear change depending on the country that you select in the Country field. Define address formats on the Address Format page in the Country Table (COUNTRY_TABLE) component.

Email Addresses

Use this group box to enter email address information for the applicant.

PreferredSelect the preferred email address. The system uses an applicant's preferred
email address as the default when it sends correspondence and notifications.
The preferred email address also appears on pages throughout the system. If
you enter more than one email address for an applicant, you must select a
preferred email address.

Phone Numbers

Use this group box to enter phone information for the applicant.

PreferredSelect the applicant's preferred phone number. The preferred phone number
appears on pages throughout the system. If you enter more than one phone
number for an applicant, you must select a preferred phone number.

Entering Job Applications

This section discusses how to:

- Review an applicant's applications.
- Enter application details.
- Enter content item details.

Pages Used to Enter Application Details

Page Name	Definition Name	Navigation	Usage
Add New Applicant page: Applications section Manage Applicant page: Applicant Data tab: Applications & Resumes section	HRS_ADD_APPLICANT	 Recruiting, Add New Applicant, Add New Applicant Access the Applications section. Recruiting, Find Applicants, Find Applicants Click an applicant name to access the Manage Applicant page, then access the Applicant 	Review a list of the applicant's job applications.
		Data tab: Applications & Resumes section.	

Page Name	Definition Name	Navigation	Usage	
Application Details	HRS_APP_PROFILE	 Click the Add Application or Edit Application link on the Add New Applicant page: Applications section. Click the Add Application link or the Edit Application icon on the Manage Applicant page: Applicant Data tab: Applications & Resumes section. Click the Application icon in various applicant grids, including the search results grid on the Find Applicants page and the Manage Applicants grid on the Job Opening page. Recruiting, Find Job Openings, Find Job Openings. Access a specific job opening, then on the Job Opening page, select <i>Edit Application</i> from the Group Action field and click the Go button. 	Enter or review the applicant's complete job application details.	
Resume Text Printable Version	HRS_RESDTL_SEC	Click the Printable Version link in the Resume Text section of the Application Details page. This link appears only after the application has been saved.	View resume test on a printer-friendly page. Use your browser's print command to print this page.	

Page Name	Definition Name	Navigation	Usage
View Questionnaire	HRS_APP_QSTN_RSLT	Click the View Questionnaire link in the Job Openings grid on the Application Details page. The link appears only for job openings that are associated with screening questions. The link is active only if the applicant has completed the questionnaire (which means it is never available when a user is adding a new applicant).	Review an applicant's answers to a completed questionnaire. See <u>Chapter 22, "Managing</u> <u>Applicants," Reviewing</u> <u>Questionnaire Details, page</u> <u>627.</u>
Add Work Experience Edit Work Experience	HRS_APP_WRK_SEC	Click the Add Work Experience link or the Edit Employment History link in the Work Experience area of the Application Details page.	Enter work experience information.
Add <content type=""> Update <content type=""></content></content>	HRS_APP_DETAIL	 Click the Add <content Type> link under a content type grid on the Application Details page.</content Click an existing entry in any content type grid on the Application Details page 	Add or update applicant profile information such as competencies, degrees, licenses & certificates, language skills, and so forth. See <u>Chapter 15, "Entering</u> <u>Applicant Data,"</u> <u>Understanding Profile</u> <u>Information in Job</u> <u>Applications, page 353.</u>
Add Priority Placement	HRS_CE_ADM_PP	Click the Add Priority Placement link or the Edit Priority Placement link on the Application Details page.	Add or edit priority placement information.

Review an Applicant's Applications

Access the Add New Applicant page: Applications section (select Recruiting, Add New Applicant, Add New Applicant, then click the Applications link).

Add New Applicant				
🎋 Add Applicant 🛛 🖶 Save	Manage Applicant A	ctivity		
Contact Details Appl	ications <u>Verific</u>	ation <u>Eliqibilit</u>	t <mark>y & Identity</mark>	
Applications		Customize Fir	nd 🖪 First 🚺 1 of 1 🖸 Last	
Resume Title	Last Updated	Last Updated By	Edit Application	
Rita Snow Resume	08/04/2009 3:31PM	PS	Edit Application	
+ Add Application				

Add New Applicant page: Applications section

Note. You can create multiple applications for an applicant.

Applications

This group box displays the applications on file for this applicant.

Edit Application	Click this link to access the Application Details page.		
	Use this link the first time you are adding an application for this applicant. If you click the Add Application link, the system creates a new row in the Applications grid and this first row will remain blank.		
Add Application	Click this link to access the Application Details page, where you can enter application details for a new application.		
	For this link to work, you must enter a first and last name for the applicant on the Add New Applicant page: Contact Details section. When you click this link, if you haven't already saved the page, the system saves the applicant and generates an applicant ID.		

Entering Application Details

Access the Application Details page (click the Edit Application link or the Add Application link on the Add New Applicant page: Applications section).

Add New Applicant						
Application Details						
Applicant Name: Rita Snow Applicant ID: 500187 Save & Continue Save & Save	Submit Cancel	Return to Pre	vious Page	a	Print Application De	tails
Resume Text						
Resume Title: Rita Snow	Resume					
Language Code: English	•					
Resume Text			Print	able Version		
Format 🛛 🔸 🖻 🛍 🦘						
20						
View Resume Attachment:	Rita Snow F	Resume.doc		elete Attachn)	nent	
Attachments		<u>Customiz</u>	<u>e Find </u> View All	🗖 🛗 Firs	st 🗹 1 of 1 🕨 Last	
File Name	*Description	Attachment Type Code	Type Description	Last Updated	Uploaded By	
RSnow Cover Letter.doc	RSnow_Cover_Let	004 🔍	Cover Letters	08/04/2009 3:36PM	Betty Locherty	
+ Add Attachment	Delete Attach	iment				-

Application Details page (1 of 6)

rences ed Start Date: 08/24/2009 ar/Temporary: Either Full/Part-Time: Full/Part-Time: Either Full/Part-Time: Full/P
ar/Temporary: Either Full/Part-Time: Either filling to Relocate Willing to Travel Travel Percentage: praphic Preference Choice: Second Choice:
filling to Relocate Willing to Travel Travel Percentage: Image: Choice: Graphic Preference Second Choice: Image: Choice: Image: Choice:
Arriling to Relocate Willing to Travel Travel Percentage:
graphic Preference Choice: Choice:
Choice: Second Choice:
red Work Days
🗹 Monday 🔽 Tuesday 🔽 Wednesday 🔽 Thursday
🗹 Friday 🔲 Saturday 🔲 Sunday
num Pay: Currency Code:
requency:
red Shift: Any Desired Hours Per Week:
r: HRS_APP_LETTER_AC
Printed: Generate Letter
Families Customize Find View All 🔤 🛗 First 🗹 1 of 1 🕨 Last
amily Description
Add Job Family
Add Job Family
Openings Customize Find View All 🔤 🛗 First 🚺 1 of 1 🗅 Last
Openings Customize Find View All Image: First I
Openings Customize Find View All 🔤 🛗 First 🚺 1 of 1 🗅 Last

Application Details page (2 of 6)

Personal Information	
Eligible to Work in U.S.:	No
*Are you a former employee:	No
Previous Termination Date:	
Referral Source	
Source ID:	▼ + -
SubSource ID:	
Specific Referral Source:	
Work Experience	
No work experience has been a	idded to this applicant's profile.
+ Add Work Experience	
Education Level	
Highest Education Level:	A-Not Indicated

Application Details page (3 of 6)

Training
No Training has been added to this applicant's profile.
+ Add Training
Areas of Study
No Areas of Study have been added to this applicant's profile.
+ Add Areas of Study
Competencies
No Competencies have been added to this applicant's profile.
+ Add Competencies
Degrees
No Degrees have been added to this applicant's profile.
+ Add Degrees
School Education
No School Education have been added to this applicant's profile.
+ Add School Education
E&G Special Projects
No E&G Special Projects have been added to this applicant's profile.
+ Add EG Special Projects

Application Details page (4 of 6)

Memberships
No Memberships have been added to this applicant's profile.
+ Add Memberships
Responsibilities
No Responsibilities have been added to this applicant's profile.
+ Add Responsibilities
Special Projects
No Special Projects have been added to this applicant's profile.
Add Special Projects
Travel Preferences
No Travel Preferences have been added to this applicant's profile.
+ Add Travel Preferences
Tests/Examinations
No Tests/Examinations have been added to this applicant's profile.
Add Tests/Examinations
Copy Limited Items From Job Openings

Application Details page (5 of 6)

T US Federal	
Priority Placement	
No Placement has been added to this	s applicant's profile
+ Add Priority Placement	
Federal Preferences	
Federal civilian employee?	 Previous Federal Employee Previous Agency Employee Current Federal Employee Current Agency Employee
Highest Pay Plan:	
Highest Grade:	
Minimum Acceptable Pay Plan:	
Minimum Acceptable Grade:	
Highest Career Tenure:	▼
Veterans Preference:	None
Reserve Category:	
Uniformed Service:	•
Military Grade:	×
Military Separation Status:	×
Military Service Start Date:	End Date:
Creditable Military Service:	
	☐ Military Service Verified ☐ Veterans Preference RIF
Effective Date:	08/04/2009
Military Status:	(Invalid Value)

Application Details page (6 of 6)

Note. The sections between the Education Level group box and the U.S. Federal group box vary depending on the content types in the system's primary person profile.

Applicant Name and	These fields display identifying information about the applicant.
Applicant ID	

Page Elements for Performing Actions

Print Application Details	Click to access the Print Application - Application Details page, which
	provides a printer-friendly format for the application data.

Save and Continue	Click to save the application and continue entering information.
Save and Submit	Click to save and submit the application. the Add New Applicant page: Applications section appears and the application that you submitted appears in the Applications grid.

Resume Text

Use this group box to attach an applicant's resume or copy the text of the resume into the Resume Text field.

Resume Title	Enter a title for the resume. This title identifies the application in the Applications grid on the Add New Applicant page: Applications section and the Manage Applicant page: Applicant Data tab: Applications section.
Language Code	Select the language in which the resume is written.
Resume Text	Enter or paste the text of the applicant's resume. Pasted text retains its original formatting. You can optionally format resume text using the provided formatting tools.
Printable Version	This link appears only if you enter resume text in the Resume Text field and submit the application. Click the link to access the Resume Text Printable Version page, where you can view and print the applicant's resume.
Add Resume Attachment	Click to browse for and upload a resume. After the resume is successfully attached, the View Resume Attachment field and the Delete Attachment button appears on the page and the system removes the Add Resume Attachment link from the page.
View Resume Attachment	Click the filename link to view the resume. The system opens the resume in a separate browser window.
	This field appears only after you attach a resume. If you delete the attached resume, the system removes this field from the page.
Delete Attachment	Click to delete an attached resume. This button appears only after you attach a resume. After you delete an attached resume, the Add Resume Attachment link appears and the system removes the View Resume Attachment and Delete Attachment options from the page.

Attachments

Use this group box to attach additional files such as cover letters and transcripts. The fields in this group box do not appear until you add an attachment.

File NameDisplays the name of the file that you uploaded. Click to view the
attachment. The system opens the attachment in a separate browser
window.

Description	Enter a description for the filename. The system populates this field to match with the attachment filename, however, you can change it.
Attachment Type Code and Type Description	Select an attachment type.
	Attachment types are defined on the Attachment Type Setup page. When you select an attachment type the system populates the Type Description column with the short description that you enter on the Attachment Type Setup page. The system uses the Attachment Type Code field to determine whether the maximum number of attachments of this type has been reached for the applicant.
	See <u>Chapter 8, "Setting Up Additional Recruiting Definitions," Setting Up</u> <u>Application Attachments, page 110.</u>
Last Updated	Displays the date and time that the attachment entry was last modified.
Uploaded By	Displays the name of the user who uploaded the attachment.
Add Attachment	Click to browse for and upload an attachment.
Delete Attachment	Click to delete the selected attachments.
Preferences	
Desired Start Date	Enter the date that the applicant would like to start working.
	This field can be used to screen applicants. It is compared to the Start Date field on the Job Opening page.
Regular/Temporary	
Regular/Temporary	field on the Job Opening page. Select <i>Regular</i> if the applicant is seeking a permanent job, <i>Temporary</i> if the applicant wants a temporary contract, or <i>Either</i> if the applicant is willing to
Regular/Temporary Full/Part-Time	field on the Job Opening page.Select <i>Regular</i> if the applicant is seeking a permanent job, <i>Temporary</i> if the applicant wants a temporary contract, or <i>Either</i> if the applicant is willing to consider both.This field can be used to screen applicants. It is compared to the
	 field on the Job Opening page. Select <i>Regular</i> if the applicant is seeking a permanent job, <i>Temporary</i> if the applicant wants a temporary contract, or <i>Either</i> if the applicant is willing to consider both. This field can be used to screen applicants. It is compared to the Regular/Temporary field on the Job Opening page. Select either <i>Full-Time</i> or <i>Part-Time</i> if the applicant is seeking a particular type of job, or <i>Either</i> if the applicant is willing to consider both full-time
	 field on the Job Opening page. Select <i>Regular</i> if the applicant is seeking a permanent job, <i>Temporary</i> if the applicant wants a temporary contract, or <i>Either</i> if the applicant is willing to consider both. This field can be used to screen applicants. It is compared to the Regular/Temporary field on the Job Opening page. Select either <i>Full-Time</i> or <i>Part-Time</i> if the applicant is seeking a particular type of job, or <i>Either</i> if the applicant is willing to consider both full-time and part-time jobs. This field can be used to screen applicants. It is compared to the Full/Part-
Full/Part-Time	 field on the Job Opening page. Select <i>Regular</i> if the applicant is seeking a permanent job, <i>Temporary</i> if the applicant wants a temporary contract, or <i>Either</i> if the applicant is willing to consider both. This field can be used to screen applicants. It is compared to the Regular/Temporary field on the Job Opening page. Select either <i>Full-Time</i> or <i>Part-Time</i> if the applicant is seeking a particular type of job, or <i>Either</i> if the applicant is willing to consider both full-time and part-time jobs. This field can be used to screen applicants. It is compared to the Full/Part-Time if the applicant is willing to consider both full-time and part-time jobs.

Geographic Preference

First Choice and Second Choice	Select the applicant's first and second location choices, if the applicant has expressed preferred locations for work.
	The recruiting locations that appear in these prompts are those that are associated with the set ID for the business unit to which the user belongs. Recruiting locations are defined on the Recruiting Location page.
	This field can be used to screen applicants. It is compared to the RS Location field on the Job Opening page.
	See <u>Chapter 8, "Setting Up Additional Recruiting Definitions," Defining</u> <u>Recruiting Locations, page 106.</u>
Comments	Enter comments about an applicant's geographic preference. This is a free- format field so you can use this field to suit the needs of the organization. For example, you could use the field to indicate national regions, such as north or west, or international regions. The screening process does not evaluate these comments.

Desired Work Days

Select the check boxes next to the days that the applicant is willing to work.

Additional Preference Fields

Minimum Pay, Currency Code, and Pay Frequency	Enter the applicant's minimum salary requirements, select the currency code, and specify the related unit in the Pay Frequency field.
	For example, if the applicant will accept a pay rate of 70,000 CAD per year, enter 70,000 in the Minimum Pay field, select <i>CAD</i> in the Currency Code field, and select <i>Year</i> in the Pay Frequency field.
	Minimum pay can be used to screen applicants. It is compared to the Minimum Salary field on the Job Opening page.
Desired Shift	If the applicant wants shift work, select the appropriate shift from the available options.
	This field can be used to screen applicants. It is compared to the Shift field on the Job Opening page.
Desired Hours Per Week	Enter the number of hours per week that the applicant prefers to work.
	This field can be used to screen applicants. It is compared to the Standard Hours/Week field on the Job Opening page.

Application Acknowledgement Letter

Letter	Select a letter template for generating a form letter to send to the applicant. The letters that are available for selection are those with the report definition HRS_APP_LET.
	See <u>Chapter 22</u> , "Managing Applicants," Sending Correspondence and <u>Recruitment Letters</u> , page 635.
Date Letter Printed	Displays the date that the letter was printed. The system automatically populates this field after you manually generate the letter or when the Print Recruitment Letters batch process prints the letter.
Generate Letter	Click this link to generate a letter using the selected letter template. The system opens the letter in a new window, where you can review it, save it locally, and optionally modify it. Once you generate a letter, you are responsible for printing and sending it; generating the letter removes it from the queue of the Print Recruitment Letters batch process.
	When you generate a letter, the system populates the Date Letter Printed field with the system date and adds the letter to the Contact History grid on the Manage Applicant page: Contact Notes tab.
	See Chapter 22, "Managing Applicants," Managing Contact Notes, page 619.

Job Families

Use this grid to identify one or more job families that the applicant is interested in. This information can be used as a means of searching for applicants that are interested in jobs within a specific job family. Job families are defined on the Job Family page.

Job Openings

Use this grid to link applicants to specific job openings.

Job Opening ID and Job Description	Select a job opening to associate with this job application. When you save the application, the applicant is linked to the job opening. If you use the delivered status processing, the applicant's initial disposition for the job opening is <i>Applied</i> .
	Note. You cannot remove rows from this grid; linking an applicant to a job opening is permanent. If you linked an applicant to a job opening in error, change the applicant's disposition with regards to that job opening to <i>Withdrawn</i> or another appropriate value.

View Questionnaire	Click this link to view the completed online questionnaire for this job opening. The online questionnaire consists of any screening questions that are associated with the job opening.
	The link appears only for job openings that are associated with screening questions, and the link is active only if the applicant has completed the questionnaire. Applicants complete questionnaires in Candidate Gateway, either when initially applying or after receiving a notification that there is an incomplete questionnaire that requires attention.
Add Job Opening	Click this link to add a blank row to the Job Openings grid so that you can select another job opening to associate with this application.
Personal Information	
(USF) Disability Code	If the applicant is disabled, select the code that identifies the type of disability. Otherwise, select <i>No Handicap</i> . Define disability codes on the Handicap Table page.
Eligible to Work in U.S.	Select <i>Yes</i> or <i>No</i> to indicate whether or not the applicant is eligible to work in the United States.
	This field is the same as the identically-named field that appears on the Add Applicant page under the USA group box of the Eligibility & Identity tab. (On the Manage Applicant page, the Eligibility & Identity tab appears as a subsection under the Applicant Data tab.) Changes made to this field anywhere in the system carry over to all of the applicant's applications and to the Eligibility & Identity tab.
	In Candidate Gateway, job applications include this field only if the resume template includes the Federal Preferences section.
Are you a former employee	Select <i>Yes</i> or <i>No</i> to indicate whether the applicant is a former employee. This setting is independent of the applicant type and employee ID that you enter on the Add Applicant Data page: Contact Details section.
Previous Termination Date	If the applicant is a former employee, enter the applicant's last day worked, if known.

Referral Source

Use this group box to enter referral information for the applicant.

Source ID and Sub Source ID	You can select Employee and Marketing type recruitment sources in the Source field. If subsources have been defined for the selected source, you can enter a subsource as well.
	If you use the Link Applicant to Job action to associate the application to another job opening, the referral information does not apply to the new job opening. However, if you use the Job Openings grid on this page to associate the application with another job opening, the referral information does apply to the additional job opening.
Specific Referral Source	Enter additional information about the selected referral source.
Empl ID, Referral Name, and Applicant is a Family Member	When you select an Employee type recruitment source, the system adds these fields so that you can enter additional information about the employee that referred the applicant.

See Chapter 11, "Setting Up Recruitment Sources," Setting Up Recruitment Sources, page 212.

Work Experience

Use this grid to display and define the applicant's work experience.

Start Date and End Date	Based on the start date and end date that you enter for each row in the grid, the system calculates the applicant's years of work experience. When there is no end date, the system calculates the years of work experience through the current date.
	This information can be used to screen applicants. The calculated value is compared to the Years of Work Experience requirement entered in the Work Experience & Education matrix on the Job Opening page.
	Note. When the screening process evaluates whether an applicant meets particular education & experience requirements, it fails applications where there are no work experience entries with start dates, even if there are zero years of work experience required.
Add Work Experience and Edit Employment History	Click these links to access either the Add Work Experience or Edit Work Experience page. Use these pages to enter new or edit existing work experience information.
Education Level	
Highest Education Level	Select the highest level of education attained by the applicant. Education levels are defined on the Content Item page using the content type <i>DEG</i> . (degree).
	This information can be used to screen applicants. The selected value is compared to the Highest Education Level field entered in the Work Experience & Education grid on the Job Opening page.

Training

Use this grid to list relevant training courses that the applicant has taken. For each course, enter the course title, the school name, and the course date. Click the Add Training link to add a blank row to the grid so that you can enter another training course.

<Profile Content Type>

Job applications include a separate grid for each profile content type in the system's primary person type profile. Grids appear alphabetically by content type code (which is different from the content type name that appears as the grid label).

Note. The exact configuration of these grids depends on how the content type is configured by the Manage Profiles business process.

See Chapter 3, "Setting Up Profile Integration," page 25.

<content item="" name=""></content>	In each content type grid, the first column displays the name of the specific content item that you added.
	For example, in the Competencies grid, the first column (labeled <i>Competencies</i>) displays a specific competency such as <i>Analytical Thinking</i> , while in the Degrees grid, the first column (labeled <i>Degrees</i>) displays a specific degree name such as <i>Bachelor of Arts</i> .
	To modify information about a content item that you have already added to the grid, click the value in this first column to access the corresponding detail page.
<additional column="" names=""></additional>	The columns that appear in each grid depend on the settings in the Content
	Section Configuration page for the content type. Specifically, fields for which you select the Summary check box on the Content Section Configuration page appear as grid columns.
Add <content item=""></content>	which you select the Summary check box on the Content Section

Copy Limited Items from Job Opening

Copy Limited Items from Job Opening	Click this button to add certain content items from the job openings that are associated with the application. The system copies job opening content items for the content types that are configured such that applicants cannot add content items. Specifically, these are the content types where the Applicant May Add Items check box is not selected on the Content Type Configuration page.
	For example, the delivered content type configuration for competencies prevents applicants from adding competencies to their applications. The assumption is that you want to rate applicants on specific job-related competencies that you have defined in the job opening. To facilitate data

competencies that you have defined in the job opening. To facilitate data entry, and to ensure that you rate applicants on the correct set of competencies, you click the Copy Limited Items from Job Opening button. If there are any competencies that are associated with the job openings listed in the application, the system copies those competencies to the application so that you can enter applicant-specific ratings.

(USF) Priority Placement

Use this grid to enter priority placement codes for the applicant. This information, along with the salary grade and level, is used by the Priority Placement process to identify applicants who should be considered as a candidate for a specific job opening. This information is compared to the priority placement codes and salary information entered on the Job Opening page.

Add Priority Placement and	Click these link to access the Add Priority Placement or Edit Priority
Edit Priority Placement	Placement page. Use these pages to enter new or edit existing priority
-	placement information for the applicant.

(USF) Federal Preferences

Use this group box to enter federal preferences.

Federal Civilian Employee	Select the appropriate check box to indicate whether the applicant is a current or previous employee of the federal government or an agency.
	This information can be used to screen applicants. The check boxes that are selected here are compared to the Recruiting Type field on the Job Opening page.
Highest Pay Plan and Highest Grade	Enter the applicant's highest pay plan or grade.
Minimum Acceptable Pay	Select the minimum pay plan and grade that the applicant will accept.
Plan and Minimum Acceptable Grade	Minimum Acceptable Grade can be used to screen applicants. This field is compared to the Minimum Pay Grade field on the Job Opening page.
Highest Career Tenure	Select the applicant's highest career tenure. Values are <i>Conditional, Indefinite,None,</i> and <i>Permanent</i> .

Veterans Preference	Select the veterans hiring preference that applies. Veterans preference values are defined on the Setup Veterans Preference page.
Reserve Category	Select the employee's reserve category, or select Not Applicable.
Uniformed Service	Select the type of uniformed service in which this veteran served. Values are: <i>Air Force, Army, Coast Guard, Marines,</i> and <i>Navy</i> .
Military Grade	Select the veterans military grade.
Military Separation Status	Select the veterans military separation status.
Military Service Start Date and End Date	Enter the applicant's military service dates.
Creditable Military Service	Enter the amount of military service for which the applicant receives credit.
Military Service Verified	Select this check box if you have verified the applicant's military service.
Effective Date	Enter the effective date for the applicant's military status.
Military Status	Select the applicant's military status.
	This field can be used to screen applicants. This field is compared to the Draft Status field on the Job Opening page.

Entering Content Item Details

Access the Add <Content Type> page (click the Add <content type> link on the Add Application Data page).

Add Competencies	6	
Details		
*Competency: *Evaluation Type:		
Reviewer ID:		
EmplID:		
Appraisal ID:		
*Rating Model:	PSCM Competency Management Scale	
*Proficiency:		
Interest Level:		
Verified By:	•	
Year Last Used:		
Year Acquired:		
Years Of Experience:		
	Reviewer Is Approved	
	Review Active	
Review Date:	31	
Description:		*
Reviewer:		*
Long Description:		- W
OK Cancel	Apply and Add Another	

Example 1: Add Competencies page

Add Degrees	
Details	
*Degree:	
Major Code:	
Major Description:	
Country:	
State:	
School Code:	
School Description:	
	Minority Institution
Minor Code:	
Minor Description:	
Average Grade:	
Cermany	
Australia	
🖻 🕒 Japan	
🕨 🔜 US Federal	
French Public Secto	r
Year Acquired:	
GPA:	
	Graduated
	Terminal Degree for Discipline
Educator:	
OK Cancel	Apply and Add Another

Example 2: Degrees page

The fields on the content type detail pages depend on the content type configuration in the Manage Profiles business process.

Apply and Add Another Click this button to save the current content item information to the application and clear the page so that you can enter information about a new content item.

See Also

PeopleSoft HR 9.1 PeopleBook: Manage Profiles, "Setting Up the Content Catalog"

Entering References

This section discusses how to:

- Review and request references.
- Enter reference details.

Pages Used to Enter References

Page Name	Definition Name	Navigation	Usage
Add New Applicant page: Verification section Manage Applicant page: Applicant Data tab: Verification section	HRS_ADD_APPLICANT	 Recruiting, Add New Applicant, Add New Applicant Access the Verification section. Recruiting, Find Applicants, Find Applicants Click an applicant name to access the Manage Applicant page, then access the Applicant Data tab: Verification section. 	Review references for an applicant, and add and edit references.
Add Reference Details Edit Reference Details	HRS_APP_REF_SEC	Click the Add Reference link or the Edit Reference link on the Add New Applicant page: Verification section.	Add or edit reference information.

Reviewing and Requesting References

Access the Add New Applicant page: Verification section (select Recruiting, Add New Applicant, Add New Applicant, then click the Verification link).

Add New Applicant				
Md Applicant	Save Manage Ap	olicant Activity		
Contact Details	Applications	Verification <u>Eliq</u>	ibility & Identity	
References				
Reference Name	Title	Employer	Edit References	
Smith,Mary	Manager	Acme, Incorporated	Edit References	Î
+ Add Reference Request Reference				

Add New Applicant page: Verification section

References

Use this group box to view the name of each reference, their title, and their employer.

Add Reference	Click to access the Add Reference Details page, where you can enter new reference information for the applicant.
Edit References	Click to access the Edit Reference Details page, where you can edit existing reference information for the applicant.
Request Reference	Click to send a request for references email notification (HRS_UPDATE_REFERENCES) to the applicant. The applicant must have an email address on record in order for the system to send this request.
	The notification instructs the applicant to use Candidate Gateway to enter reference information. If the applicant is not yet a registered user of Candidate Gateway, the system generates a Candidate Gateway user ID and password for the applicant and includes them in the email notification. By using these system-generated logon credentials, the applicant ensures that the Candidate Gateway account is properly associated with the existing applicant record.
	Once signed in to Candidate Gateway, the applicant also sees a request for references notification in the Notifications grid on the Careers Home page.
	See PeopleSoft Candidate Gateway 9.1 PeopleBook, "Using Candidate Gateway."

Entering Reference Details

Access the Add Reference Details page (click the Add Reference link or the Edit Reference link on the Add New Applicant page: Verification section).

Manage Applicant:			
Add Reference	e Details		
Reference Details			
Reference Number:	1		
*Date Contacted:	08/05/2009 🕅 *Reference Type:	Professional	▼
Reference Name:			
Title:			
Employer:			
	Country:		
	Address:		Edit Address
Country Code:	Contact Phone:		
Comment:			<u>ح</u>]
OK Cancel	Refresh		

Add Reference Details page

Enter information about the person who provided the reference, then use the Comments field to record your notes.

Entering Applicant Eligibility and Identity Information

This section discusses how to add eligibility and identity information.

Pages Used to Enter Applicant Eligibility and Identity Information

Page Name	Definition Name	Navigation	Usage
Add New Applicant page: Eligibility & Identity section Manage Applicant page: Applicant Data tab: Eligibility & Identity section	HRS_ADD_APPLICANT	 Recruiting, Add New Applicant, Add New Applicant Access the Eligibility & Identity section. Recruiting, Find Applicants, Find Applicants Click an applicant name to access the Manage Applicant page, then access the Applicant Data tab: Eligibility & Identity section. 	Enter eligibility and identity information for an applicant.
Add National ID Edit National ID	HRS_APP_NID	Click the Add National Identification link or the Edit National ID link on the Add New Applicant page: Eligibility & Identity section.	Enter national ID information for an applicant.
Add Citizenship Edit Citizenship	HRS_APP_CIT_PSP1	Click the Add Citizenship link or the Edit Citizenship Details link on the Add New Applicant page: Eligibility & Identity section.	Enter citizenship information for an applicant.
Add Visa Permit Details Edit Visa Permit Details	HRS_APP_VSA_PMT1	Click the Add Visa Permit link or the Edit Visa Permit Details link on the Add New Applicant page: Eligibility & Identity section.	Enter visa permit information for an applicant.
Add Bank Account Edit Bank Account	HRS_APP_BANKACCT	Click the Add Bank Account link or the Edit Bank Account link on the Add New Applicant page: Eligibility & Identity section.	Enter bank account information for an applicant.

Adding Eligibility and Identity Information

Access the Add New Applicant page: Eligibility & Identity section (select Recruiting, Add New Applicant, Add New Applicant, then click the Eligibility & Identity link).

Add New Applicant
Applicant ID: 500192
Add Applicant 🖶 Save Manage Applicant Activity
Contact Details Applications Verification Eligibility & Identity
Personal Information
Date of Birth: *Marital Status: Unknown
*Gender: Unknown
Canada
Switzerland
Cermany
Spain
France
Viited Kingdom
E Italy
Dapan
USA USA
Australia
Malaysia
New Zealand
Singapore

Add New Applicant page: Eligibility & Identity section (1 of 4)

National Identification
No National Identification has been added to this applicant's profile.
Add National Identification
Citizenship
No Citizenship has been added to this applicant's profile.
+ Add Citizenship
Visa Permit
No Visa Permit has been added to this applicant's profile.
Add Visa Permit
Bank Account
No Bank Account has been added to this applicant's profile.
+ Add Bank Account

Add New Applicant page: Eligibility & Identity section (2 of 4)

✓ Applicant Disability	
Switzerland	
Germany	
Spain	
France	
Italy	
Dapan	
Netherlands	
Dited Kingdom	
USA USA	
New Zealand	
Brazil	

Add New Applicant page: Eligibility & Identity section (3 of 4)

- Accommodation Req	uest			
Applicant Information		<u>Find</u> View All	First 🚺 1 of 1 🗋 Last	
*Accommodation ID:	1	*Date of Request:	• -	
Comment:			E	
*Responsible ID:	Q			
*Request Status:	Pending 💌	*Status Date:	31	
Diagnosis		<u>Find</u> View All F	irst 🚺 1 of 1 🖸 Last	
*Regulatory Region:			+ -	
Diagnosis Code:	Q			
- Accommodation Opti	on			
Applicant Information		Find	View All First 🚺 1 of 1 🚺 Las	st
Accommodation ID:	1	Date of Request:	+ -	
Option Details		<u>Find</u> Vie	ew All First 🚺 1 of 1 🕨 Last	
*Option ID:	1	*Currency Code:		
🗆 Emplo	yer Suggested Option	1		
*Type:	<u> </u>	Cost:	0.00 👳	
Description:			<u>ح</u>]	
*Status: Conside	r 💌	*Status Date:	3	

Add New Applicant page: Eligibility & Identity section (4 of 4)

Personal Information

Use this group box to enter date of birth, gender, and marital status.

Date of birth and gender can be used to screen applicants. Date of birth is used to calculate the applicant's age and is compared to the Maximum and Minimum Age fields on the Job Opening page.

Country-Specific Personal Information

Enter additional country-specific information for applicants. Entering citizenship information for an applicant is similar to entering citizenship information for an employee.

See *PeopleSoft HR 9.1 PeopleBook: Administer Workforce*, "Adding a Person in PeopleSoft Human Resources," Entering Country-Specific Person Data.

For USA only, military status can also be used to screen applicants. Military status is compared to the Draft Status field on the Job Opening page.

National Identification

Add National Identification and Edit National Id	Click to access the National ID page, where you can enter new or edit existing national ID information for the applicant. Entering national ID information for an applicant is similar to entering national ID information for an employee.		
	See <i>PeopleSoft HR 9.1 PeopleBook: Administer Workforce</i> , "Adding a Person in PeopleSoft Human Resources," National ID.		
Citizenship			
Add Citizenship and Edit Citizenship Details	Click to access the Citizenship page, where you can enter new or edit existing citizenship information for the applicant. Entering citizenship information for an applicant is similar to entering citizenship information for an employee.		
	See <i>PeopleSoft HR 9.1 PeopleBook: Administer Workforce</i> , "Entering Additional Data in Human Resources Records," Tracking Employee Passport and Citizenship Information.		
Visa Permit			
Add Visa Permit and Edit Visa Permit Details	Click to access the Visa Permit Details page, where you can enter new or edit existing visa permit details. Entering visa information for an applicant is similar to entering visa information for an employee.		
	See <i>PeopleSoft HR 9.1 PeopleBook: Administer Workforce</i> , "Entering Additional Data in Human Resources Records," Entering an Employee's Visa or Permit Information.		
Bank Accounts			
Add Bank Account and Edit Bank Account	Click to access the Bank Account page, where you can enter new or edit existing bank account information for the applicant. Entering bank account information for an applicant is similar to entering bank account information for an employee.		
	See <i>PeopleSoft HR 9.1 PeopleBook: Administer Workforce</i> , "Entering Additional Data in Human Resources Records," Recording a Person's Bank Account Information.		

Applicant Disability

Use this group box to enter country-specific disability information. Entering disability information for an applicant is similar to entering disability information for an employee.

See *PeopleSoft HR 9.1 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Entering Disability Information.

Accommodation Request

Use this group box to enter accommodation requests for an applicant with a disability. Entering accommodation requests for an applicant is similar to entering accommodation requests for an employee.

See *PeopleSoft HR 9.1 PeopleBook: Meet Regulatory Requirements*, "(GBR, USA, and USF) Meeting Disability Regulatory Requirements," Entering Accommodation Requests.

Accommodation Options

Use this group box to enter accommodation options for an applicant with a disability. Entering accommodation options for an applicant is similar to entering accommodation options for an employee.

See *PeopleSoft HR 9.1 PeopleBook: Meet Regulatory Requirements*, "(GBR, USA, and USF) Meeting Disability Regulatory Requirements," Entering Accommodation Options.

Chapter 16

Searching for Applicants

This chapter provides an overview of applicant searches and discusses how to:

- Build Verity search collections.
- Perform applicant and profile searches.
- Work with saved searches

Understanding Applicant Searches

The Find Applicant page enables you to perform these types of searches:

• Applicant Search

This is a basic database search that looks for selected values in specific applicant data fields. It does not search any job application fields (other than the date the application was received). Rather, it searches non-application data such as the applicant status, type, disposition, and so forth. This search is not suitable for finding applicants with specific qualifications.

• Resume and Application Search

This search uses the Verity search engine to search for keywords in applicant resumes. The only available search criteria are the keywords and how recently the application was received.

The system searches for the keywords only in the resume section of applications. The resume can be either an attachment or text in the Resume Text field. The system does *not* look at any other application data.

Advanced Keyword Search

This search uses the Verity search engine to find applicants that meet your criteria. This search enables you to search for keywords in a resume and to search application data, including profile data such as competencies and other qualifications. If you have enabled profile integration on the Recruiting Installation – General page, you can populate qualification-related search criteria fields by copying content from a profile you choose.

• Profile Match

This search uses the Verity search engine to match applicants, employees, job openings, and non-persons based on their profile data. For example, to find candidates for a job opening, you could search for applicants and employees with profiles that match the job opening profile. You can similarly search for suitable job openings for a particular applicant or applicants who are similar to a particular employee.

When you perform a profile match, you do not choose which profile content to search for. Instead, the system considers all content that is associated with the profile.

Note. When you use a profile match search to search for employees who match a job opening, the system provides an option to generate email suggesting to selected employees that they apply for the job opening. Until the employee applies, there is no applicant record for the employee, and you cannot perform any recruiting actions related to the employee.

AIRS Oxygen search

If you have licensed and implemented AIRS Oxygen, a web-based tool that searches various locations on the internet for applicant information, the Find Applicant page also includes an AIRS logo that you click to perform an AIRS search. AIRS Oxygen is licensed separately and solely by AIRS. If you wish to license an AIRS product you must contact AIRS.

When you initially access the Find Applicants page, it includes group boxes for performing either an Applicant Search or a Resume and Application search. It also includes links that you use to switch the page into Advanced Keyword Search mode or Profile Match mode.

When the Find Applicants page is in its initial state, performing an Applicant Search removes the page elements related to the Resume and Application search. Performing a Resume and Keyword search (which is essentially a subset of the Advanced Keyword Search) changes the page into Advanced Keyword Search mode.

Building Search Collections for Applicant Searches

This section provides an overview of search collections and discusses how to:

- Build applicant search collections.
- Build additional collections for profile match searching.

See Also

Verity Functionality in Recruiting Solutions 9.1

"Verity Functionality in Recruiting Solutions 9.1" red paper posted to My Oracle Support

Understanding Search Collections

Talent Acquisition Manager uses the Verity search engine in the keyword and resume search, the advanced applicant search, and for profile matching. For a search to be successful, there must be a Verity search collection that contains the searchable data. There are various Verity search collections that you need to build.

Important! Verity searches only access data that is in the collection; they do not access the PeopleSoft database directly. Therefore, it is critical to update your collections frequently.

Search Collection Summary

The following table summarizes the collections that are used for each type of applicant search:

Search Type	Collections Used	Reference
Applicant Search	None; this is a database search.	See <u>Chapter 16, "Searching for</u> <u>Applicants," Performing Basic</u> <u>Database Searches, page 402.</u>
Keyword and Resume Search	Application and resume collection.	See <u>Chapter 16, "Searching for</u> <u>Applicants," Performing Simple</u> <u>Keyword Searches, page 406.</u>
Advanced Keyword Search	Application and resume collection.	See <u>Chapter 16, "Searching for</u> <u>Applicants," Performing Advanced</u> <u>Keyword Searches, page 410.</u>
Profile Match	There are four types of profiles that can be searched; each type of profile has its own collection or collections: Applicant profile collection. Job opening profile collection. Person profile collection (for employees). Nonperson profile collections.	See <u>Chapter 16, "Searching for</u> <u>Applicants," Performing Profile</u> <u>Searches, page 416.</u>

Note. This table lists only applicant searches. There are additional searches in Talent Acquisition Manager and Candidate Gateway that use the job opening collections; these are discussed elsewhere.

See Chapter 14, "Managing Job Postings," page 331.

Applicant Collections

To create the applicant collections, run the Verity Applicant Index Build (HRS_SRCH_IDX) Application Engine process. This process, in turn, runs the build search index (HRS_SRCH_APP) process to actually build the collections.

The two collections that contain applicant data are:

• The application and resume collection.

This collection contains applicant data, including resume text, that you can search using the keyword and resume search or the advanced applicant search. It also contains applicant profile items as text: for example0100 Abstract thinking within the content section COMPETENCY.

• The applicant profile collection.

This collection contains applicant profile data (such as competencies) that you can search using the Profile Match search.

The Verity Applicant Index Build process creates this collection only if profile utilization is active (on the Recruiting Installation - General page, the Allow Profile Utilization field value is *Yes.*)

The applicant profile collection contains codes within a dynamically generated nested structure representing different profile attributes: for example, 0100 within the item property JPM_CAT_ITEM_ID within the content item ITEM_0100 within the content section SECTION_COMPETENCY

Job Posting Collections

To create the job posting collections, run the Verity Job Posting Index Build (HRS_JSCH_IDX) Application Engine process. This process creates two collections that contain data for posted job openings.

• The job posting collection.

This collection is not used for applicant searches. It contains job opening data, and it contains job profile items as text (for example *CIRM Integrated Resource Management* within the content section *LIC* (licenses).

and is used for job posting searches in both Candidate Gateway and Talent Acquisition Manager.

• The job opening profile collection.

This collection contains job opening profile data (such as competencies) that you can use when searching for applicants using the Profile Match search. It is also used in Candidate Gateway, where internal applicants (but *not* external applicants) can search for job openings that match their own person, job, or interest profiles.

The Verity Job Posting Index Build process creates this collection only if profile utilization is active (on the Recruiting Installation - General page, the Allow Profile Utilization field value is *Yes.*)

The job opening profile collection contains codes within a dynamically generated nested structure representing different profile attributes: for example, *N* within the item property *JPM_YN_2* within the content item *ITEM_CIRM* within the content section *SECTION_LIC*.

Important! Although the data in these collections comes from the entire job opening rather than from just the job posting, these collections are called the job posting collections because they include only data from posted job openings.

See Chapter 14, "Managing Job Postings," Building the Job Posting Collections, page 331.

Person and Non-Person Profile Collections

These collections contain person and non-person profile data that you can search using the Profile Match search. These collections do not include profile data for applicants or job openings.

To create these collections, you need to run two processes:

• First, run the Build Manager List (JPM_DR_UNLD) Application Engine process to create the management reporting structure.

The system uses this information when building the profile search collections to give managers access to the profiles of their direct reports.

• Next, run the Maintain Profile Indexes (JPM_BLD_INDX) Application Engine process, which actually creates the collections.

See PeopleSoft HR 9.1 PeopleBook: Manage Profiles, "Setting Up Search and Compare Profiles."

Pages Used to Build Search Collections

Page Name	Definition Name	Navigation	Usage
Build Applicant Index	HRS_SRCH_RUN_INDEX	Recruiting, Administration, Build Applicant Index, Build Applicant Index	Build the application and resume collection and the applicant profile collection by running the Verity Applicant Index Build (HRS_SRCH_IDX) Application Engine process, which then runs the build search index (HRS_SRCH_APP) process to actually build the collections. Note. The applicant profile collection is created only if profile utilization is active.
Build Job Index	HRS_JSRCH_RUN_PROC	Recruiting, Administration, Build Job Index, Build Job Index	Build the job posting collection and the job opening profile collection by running the Verity Job Posting Index Build (HRS_JSCH_IDX) Application Engine process. Note. The job opening profile collection is created only if profile utilization is active. See <u>Chapter 14</u> , "Managing Job Postings," Building the Job Posting Collections, page 331.

Page Name	Definition Name	Navigation	Usage
Build Manager List	RUNCTL_JPM_DR	Set Up HRMS, Product Related, Profile Management, Profiles, Build Manager List, Build Manager List	Build the manager list by running the Build Manager List (JPM_DR_UNLD) Application Engine process. See <i>PeopleSoft HR 9.1</i> <i>PeopleBook: Manage</i> <i>Profiles</i> , "Setting Up Search and Compare Profiles," Running the Build Manager List Process.
Maintain Profile Indexes	RUNCTL_JPM_INDX	Set Up HRMS, Product Related, Profile Management, Profiles, Maintain Profile Indexes, Maintain Profile Indexes	Build the person and non- person profile collections by running the Maintain Profile Indexes (JPM_BLD_INDX) Application Engine process. See <i>PeopleSoft HR 9.1</i> <i>PeopleBook: Manage</i> <i>Profiles</i> , "Setting Up Search and Compare Profiles," Running the Maintain Profile Indexes Process.

Building Applicant Search Collections

Access the Build Applicant Index page (Recruiting, Administration, Build Applicant Index).

Build Appl	icant Index		
Run Control ID:	PS	Report Manager Process Monitor	Run
Resume Search	Collection		
• Create New C • Update Existi		From Application Date:	
Applicant Status	to be Indexed	Customize Find 🖾 🛗 First 🗹 1-4 of 4 🖸 Last	
Select	Description		
	010 Active		
	020 Hired		
	030 Inactive		
	040 Queued		
space to hold all r Leave segment si example, supposi company is equip and based on this This choice result 30)/20 collections	resume attachment ize blank or for high e your company rec ed with hardware to a distribution of data ts in approx (100 x 2 being created for th	volume situations enter the segment size in number of days. For ceives 100 resumes per day over a 6 month period . Your o enable the use of segmenting during the Applicant Index build a chooses a segment size of '20' days. 20) applications being indexed per index collection and (6 x	
Attachment Temp	p Directory:	c.iomp	

Build Applicant Index page

Resume Search Collection

This process run in two modes.

Create New	Select this option to build new collections. The new collections include applications that have been submitted on or since the date that you enter in the From Application Date field.
Update Existing	Select this option to add, update, and delete entries in the existing collections.
From Application Date	When the system builds or updates the applicant collections, it includes applications that were submitted on or since the date you enter in this field. If you leave this field blank, all applications are included in the collections.

Applicant Status to be Indexed

Select and Description	Select which applicant statuses to include in the Verity search collection. You must select at least one status before you can build or update the collection. The selection grid shows all statuses that have been defined for the Applicant recruitment area. The four statuses that PeopleSoft delivers are Active, Hired, Inactive, and Queued.	
	Only applicants who are included in the collection are searchable using the Resume and Applicant search, the Advanced Keyword search, or the Profile Match search.	
	Applicant who are not included in the collection are still searchable using the Applicant Search (the database search for applicants). If you want consistency among all types of searches, you can include all available statuses in the collection. However, when there are large numbers of applicants in the system, you can improve the performance of Verity searches by including fewer applicants (for example, only active applicants).	
	Note. The Advanced Keyword Search gives users the option to exclude selected statuses from search results. The list of statuses that appears on the Advanced Keyword Search page include all statuses, not just the ones that you included in the collection.	

Additional Page Elements

Attachment Temp Directory (attachment temporary directory)	Enter a directory where the system can temporarily store resume attachments while building the applicant and resume collection. Be sure there is enough space to hold all resume attachments		
	This path is relative to the PeopleSoft Process Scheduler that is running the process. Make sure that the Process Scheduler's login has read/write access to this directory.		
	Resumes stored in this temporary directory are not deleted after the Build Applicant Index process is run. This improves performance because the system does not need to copy the resumes to the temporary directory each time you run the process. If you want to delete the resumes, you must do so manually.		

Segment Size	Segment size accommodates situations where a high volume of applicant data needs to be indexed; you can leave this field blank if you are not processing a high volume of applications.
	If you enter a segment size, the application data is split into multiple collections, or segments.
	The value that you enter represents the number of days worth of data to be included in each collection. A smaller segment size will result in more collections for a given set of data and a larger segment size gives fewer collections.
	Segmenting is useful in high data volume situations where a multi- processor machine is available. It reduces the amount of time it takes to build the applicant collections on such hardware.
	Choice of an effective segment size depends on several factors including expected number and distribution of incoming applications. When making this decision some analysis of the expected mean distribution of incoming applications is required. For example, if you expect to receive approximately 100 resumes per day over a 6-month period, and your analysis suggests a segment size of 20 days, then approximately (100 x 20) applications are indexed per index collection. For the six month period, the number of collections is the total number of days in the period divided by 20.
	Segmenting is useful in high data volume situations where a multi- processor machine is available. It reduces the amount of time it takes to build the applicant collections on such hardware. Choice of an effective segment size depends on several factors including expected number and distribution of incoming applications. When making this decision some analysis of the expected mean distribution of incoming applications is required. For example, if you expect to receive approximately 100 resumes per day over a 6-month period, and your analysis suggests a segment size of 20 days, then approximately (100 x 20) applications are indexed per index collection. For the six month period, the number of collections is the total number of days in the period divided by

Building Additional Collections for Profile Match Searching

To create the job posting collections, including the job opening profile collection, access the Build Job Index page (Recruiting, Administration, Build Job Index, Build Job Index).

See Chapter 14, "Managing Job Postings," Building the Job Posting Collections, page 331.

To build the manager list before creating the person and non-person profile collections, access the Build Manager List page (Set Up HRMS, Product Related, Profile Management, Profiles, Build Manager List, Build Manager List).

See *PeopleSoft HR 9.1 PeopleBook: Manage Profiles*, "Setting Up Search and Compare Profiles," Running the Build Manager List Process.

To create the person and non-person profile collections, access the Maintain Profile Indexes page (Set Up HRMS, Product Related, Profile Management, Profiles, Maintain Profile Indexes, Maintain Profile Indexes).

See *PeopleSoft HR 9.1 PeopleBook: Manage Profiles*, "Setting Up Search and Compare Profiles," Running the Maintain Profile Indexes Process.

Performing Applicant and Profile Searches

This section provides an overview of profile-based searching in the advanced keyword search, lists common elements used to search for applicants, and discusses how to:

• Perform basic database searches.

- Perform simple keyword searches.
- Perform advanced keyword searches.
- Perform profile searches.
- Review profile match details.
- Use AIRS to search the internet for applicants.

Understanding Profile-Based Searching in the Advanced Keyword Search

The advanced keyword search offers several search criteria fields that you use to search for particular qualifications. Because Talent Acquisition Manager uses profiles to store applicant qualifications, the specific search fields that appear vary depending on how profiles have been configured for the recruiting process.

Only profile content types that you have configured for use in recruiting (on the Content Section Configuration page) are available for searching. This is a subset of the content types in the primary person profile type that you define using the Manage Profiles business process in PeopleSoft Human Resources.

See Chapter 3, "Setting Up Profile Integration," page 25.

When you enter search criteria, you can optionally select a job opening ID, an employee ID, or a non-person profile ID whose primary profile is to be used as the basis for the applicant search. If you select one of these profile types, the system copies profile content items (specific qualifications, such as a specific competency or a specific degree) into the corresponding search fields so that you can search for applicants with matching qualifications.

Additionally, the system hides any profile-based search fields that are not part of the selected profile.

Common Elements Used to Search for Applicants

AIRS	Click this graphic to use AIRS Oxygen to search the internet for applicants. This link appears only in systems that have been set up to integrate with AIRS Oxygen.		
	See <u>Chapter 16</u> , "Searching for Applicants," Using AIRS to Search the Internet for Applicants, page 422.		
Advanced Search	Click to display the Find Applicants page in advanced search mode, which enables you to search the Verity collection using both specific criteria and keywords.		
Basic Search	Click this link to return the Find Applicants page to its initial mode, which displays fields for performing databases searches and simple keyword searches.		
Profile Match	Click to display the Recruitment Profile Match page, where you can search for applicant, employee, job opening, and non-person profiles that match a specific applicant, employee, job opening, and non-person profiles.		

Return to Find Applicants	Click to return the Find Applicants page to its initial mode, which displays fields for performing database searches and simple keyword searches.
Search My Applicants	Select this check box if you want to see only the applicants that are attached to job openings where you are either the originator or part of the hiring team. Applicants that you enter into the system are not considered your applicants unless they are associated with one of your job openings.
	If the check box is not selected, the system looks at all applicants that match your search criteria.
	This check box is not available for profile match searches.
Search Tips	Click to access the Search Tips page, which displays information about how to construct keyword searches. For example, the page explains how to perform wildcard searches.

Pages Used to Search for Applicants

Page Name	Definition Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Perform all types of searches (database searches, simple keyword searches, advanced keyword searches, and profile searches), review search results, access detailed information for specific applicants, and perform specific predefined actions on selected applicants.
Recruitment Profile Match	HRS_REC_SCHAPP	Click the Profile Match link on the Find Applicants page.	Search for applicant, employee, job opening, or non-person profiles that match a specific applicant, employee, job opening, or non-person profile.
Compare Results Match Result	HRS_COMPARE_RESULT HRS_COMPARE_RSLT2	Click the Compare button on the Recruitment Profile Match page.	Review a detailed profile comparison. The page always displays the profile that you were trying to match; you select rows from the search results to compare to that profile. There are two versions of this page: a standard version, and a version that appears in accessible mode.

Page Name	Definition Name	Navigation	Usage
Search Tips	HRS_REC_SRCH_TIPS	Click the Search Tips link on the Find Applicants page.	View tips for constructing keyword searches. For example, the search tips provide information on the use of <i>and</i> and <i>or</i> in searches and on searching for entire phrases.

Performing Basic Database Searches

Access the Find Applicants page (Recruiting, Find Applicants, Find Applicants).

Find Applican	ts
Applicant Search	
Find Applicants	Reset Search
Search My Applic	ants
Job Opening ID:	
Applicant ID:	
First Name:	Rodney
Last Name:	
Applicant Status:	Active
Applicant Type:	
Disposition:	
Applied Within:	
Applied Between:	And:
Find Applicants	Reset Search
Saved Resume and Ap	
Resume and Applicati	on Search
Enter Keywords:	Application received:
Find Applicants	Save Search Advanced Search Profile Match Search Tips
	AIRS

Find Applicants page as it appears before searching

Find	Find Applicants						
Saved Re	Saved Resume and Applicant Search						
🕨 View A	pplicant Search (Criteria					
🗹 1 R	esults Found						
Search	Results			<u>C</u>	<u>ustomize Fi</u>	nd View All 🗗	🛛 🛄 First 🗹 1 of 1 🕨 Last
Select	Applicant	Applicant ID	Job Opening	Disposition	Resume	Application	*Take Action
	Rodney Clarke	100202	Web Developer- 10224	070 Offer		*	Select Action
Select All	Select All Deselect All *Group Action: Select Group Action						
<u>Return to</u>	Find Applicants						AIRS

Find Applicants page as it appears after performing a database search

Note. When you first access the Find Applicants page, it displays the Applicant Search group box for database searches and the Resume and Application Search group box for simple keyword searches. After you perform a database search, the search results appear and the Resume and Application search section is hidden. After you perform a Resume and Application search, the page changes to advanced search mode.

Applicant Search

Use the Applicant Search group box to enter criteria. After you perform a search, this section is hidden within a collapsed section titled View Applicant Search Criteria. You can expand the section to modify your search criteria and perform another database search.

Find Applicants	 Click this link to initiate the search. After you click this button, the page changes to show only fields that are applicable to the search you performed: Search results appear, along with the page elements that you use to initiate actions for specific rows in the search results grid. The Resume and Application Search section is hidden (although the field for selecting a saved Resume and Applicant Search remains visible).
	• The Advanced Search and Profile Match links are hidden.
	Click the Return to Find Applicants link to return the page to its original pre-search state.
Reset Search	Click this link to deselect the search criteria fields. If the Search My Applicants check box is selected, resetting the search criteria does not deselect it.
	After resetting your search criteria, you must enter criteria in at least one field before you can perform another search.

Search My Applicants	Select this check box if you want to see only the applicants that are attached to job openings where you are either the originator or part of the hiring team. Applicants that you enter into the system are not considered your applicants unless they are associated with one of your job openings.				
	If the check box is not selected, the system looks at all applicants that match your search criteria.				
Job Opening ID	When you enter a job opening ID, the search results include only applicants who are associated with that job opening.				

Search Results

Because the database search does not use the Verity search collection, this search always applies to all applicants in the system.

Search results can show multiple rows for applicants who have applied for more than one job opening (each job opening appears in a separate row in the search results). The search results can also includes rows for applications that are not associated with any job openings.

Select	Select this check box to identify rows to be included in any group action that you perform on this page.					
Applicant and Applicant ID	Displays the applicant's name and ID. The applicant's name is a link that you click to access the Manage Applicant page.					
Job Opening	Displays either <i>No Job Opening Selected</i> or the primary posting title of the job opening that is associated with the application. Click a posting title to access the Job Opening page.					
Disposition	Displays applicant's current disposition for the job opening. The values are the statuses that have been defined for the Recruitment Summary status area.					
	Click this link to access the Disposition Details page. The exact title and content of the Disposition Details page depends on the applicant's status.					
Resume	Click to open a new window that displays the applicant's resume.					
	• If the resume is an attachment, the file opens in the new window.					
	• If the resume was entered into the Resume Text field in the application, the new window displays the Applicant Resume page.					
	• If no resume exists for a particular applicant (for example, the applicant instead completed the work experience fields in the online application), then this column is blank.					
	If none of the applicants in the grid have resumes, the entire Resume column is hidden.					
Application	Click to open a new window that displays the Application Details page, where you can review the applicant's complete job application.					

Take Action	Select an action you want to take for the selected applicant. The system automatically initiates the action and accesses the appropriate page.					
	In this context, the following actions are available: Add Applicant to New List, Add Applicant to Saved List, Change Applicant Status, Create Interview Evaluation, Create Salary Package Model, Forward Applicant, Link Applicant to Job, Manage Applicant Checklist, Manage Interviews, Prepare For Hire, Prepare Job Offer, Print Application Details, Reject Applicant, Route Applicant, and Send Correspondence.					
	See <u>Chapter 22</u> , "Managing Applicants," Actions in the Take Action Field, page 603.					
Select Group Action and Go	Select an action to be performed on all selected applicants. Unlike actions performed on a single applicant using the Take Action field, the system does not perform the action immediately. Instead, you must click the Go button to initiate the selected action.					
	The actions available as group actions are a subset of the actions that you can perform on individual applicants. These are the actions that you can <i>not</i> perform on a group: <i>Create Interview Evaluation, Create Salary Package Model, Manage Applicant Checklist, Prepare for Hire,</i> and <i>Prepare Job Offer.</i>					

Performing Simple Keyword Searches

Access the Find Applicants page (Recruiting, Find Applicants, Find Applicants).

Find Applicant	S
Applicant Search	
Find Applicants	Reset Search
Search My Applic	ants
Job Opening ID:	
Applicant ID:	
First Name:	
Last Name:	
Applicant Status:	Active
Applicant Type:	
Disposition:	
Applied Within:	
Applied Between:	And:
Find Applicants	Reset Search
Saved Resume and App Resume and Applicati	· · · · · · · · · · · · · · · · · · ·
	omputers Application received:
Find Applicants	Save Search Advanced Search Profile Match Search Tips
	AIRS

Find Applicants page as it appears before searching

Fi	Find Applicants											
Sav	Saved Resume and Applicant Search: Select Search Find Applicants											
_	View Resume and Application Search criteria S a Results Found											
	First Previous Next Dast											
	Search	Results										
S	Select	Score	Applicant	Applicant ID	Туре	Date Applied	Resume	Application	Former Employee	Take Action		
		77%	<u>Rodney</u> <u>Clarke</u>	100202	Ext	03/19/2006		<u></u>		Select Action	•	
		77%	<u>Lok Tsui</u>	305	Ext	05/02/2001	æ	2 -		Select Action	•	
		77%	<u>Samuel</u> Biddles	42	Ext	02/15/2001	Image: A start of the start	2 -	Ŷ	Select Action	•	
								€ €ir:	st∢Previous	Next⊫Last⊯		
-	Select All Deselect All Go Save For Compliance Go											
Ret	Return to Find Applicants AIRS											

Find Applicants page as it appears after performing a keyword search

Note. When you first access the Find Applicants page, it displays the Applicant Search group box for database searches and the Resume and Application Search group box for simple keyword searches. After you perform a Resume and Application search, the page changes to advanced search mode.

Find Applicants Click to perform the search.

Page Elements for Saved Searches

Saved Resume and Applicant Search	Select a saved search, then click the Find Applicants button to perform the search.			
	This list of available saved searches includes public searches, as well as private searches that you created.			
	See <u>Chapter 16</u> , "Searching for Applicants," Working With Saved Sear page 423.			
Save Search	Click to save your search criteria.			

Save for ComplianceClick this button, which appears below the search results after you perform
a search, to save the search results (not the search criteria) for auditing and
statutory reporting purposes. There is a setting on the Recruiting
Installation - Jobs page that can force saving when the search criteria
includes a job opening.See Chapter 16, "Searching for Applicants," Understanding Applicant
Searches, page 391 and Chapter 2, "Defining Installation Options for
Recruiting," Defining Job-Related Settings, page 15.

Resume and Application Search

When the Find Applicants page is in its initial mode, use the Resume and Application Search section to enter criteria for a keyword search. After you perform a keyword search, the page changes to advanced search mode. The advanced search criteria fields are initially hidden within a collapsed section titled View Resume and Application Search Criteria. You can expand the section to perform another search using the advanced search criteria fields, or you can click the Return to Find Applicants link to access the Find Applicants page in its initial mode.

Enter Keywords	Enter any words or phases that you want the system to look for in applicant's resumes. The system searches for the keywords only in the resume section of applications. The resume can be either an attachment or text in the Resume Text field. The system does <i>not</i> look at any other application data.
Application received	To limit the search to applications that were received within a specific time frame, select one of these time frames: <i>Within Last Day, Within Last Week, Within Last Month, Within Last Year,</i> and <i>Anytime.</i>

Search Results

When you perform a keyword search, the system searches the Verity search collection. Because the collection can be built to include only applicants with specific statuses, the search results might include only a subset of the applicants in the database.

The search results grid for a keyword search contains some of the same information as the results of a database search along with these additional fields:

Score	Displays a score that represents how closely the application matches your search criteria. The Verity search engine assigns this score.
	See "Verity Functionality in Recruiting Solutions 9.1" red paper posted to My Oracle Support
Туре	Possible applicant types are <i>Emp</i> (employee), <i>Ext</i> (external applicant), or <i>Oth</i> (other).
	The <i>Oth</i> value appears when the applicant type is <i>Non-Employee</i> , a value generally used for applicants who, although not current employees, already have data in the PeopleSoft HCM system.

Date Applied	Displays the date that this application was originally saved to the system.
Former Employee	Displays a person icon if the applicant is a former employee. This information is <i>not</i> validated by the system; the applicant or recruiter who entered the application into the system manually sets this value.
	If the applicant is not a former employee, then this column is blank. If none of the applicants in the grid are former employees, the entire column is hidden.

Performing Advanced Keyword Searches

Access the Find Applicants page in advanced search mode (on the Find Applicants page, click the Advanced Keyword Search link).

Find Applicants		
Saved Resume and Applicant Search: Select Search Find Applicants		
Advanced Keyword Search Find Applicants Save Search Reset Search Profile Match Search Search		
Search My Applicants Match Applicants Using: All Fields Resume Text or Keywords:	•	
		<u>رع</u>
Resume Language: English	•	
Job Opening ID: 503	712 🔍 Manager-Oper	rations
Emp ID:		
Profile ID:		
Display applicants in Applied status to	the Job Opening	
\Box Expressed interest in the same job far	mily as the job opening	isin
\square Keywords that match the job descripti	ion	
Applicant Type	Exclude	Applicant Status from Search
External Applicant	Select	Description
Internal Applicant		010 Active
Non-Employee		020 Hired
		030 Inactive
		040 Queued

Find Applicants (Advanced Keyword Search) page (1 of 2)

Application Date Range:	iii to	
Referral Source:		
Referral SubSource:		
Work Experience:		Clear
Competencies:	0160 Ability to prioritize tasks, 0212 Organize people and go	Clear
Degrees:		Clear
School Education:		Clear
Honors and Awards:		Clear
Licenses & Certifications:		Clear
Language Skills:		Clear
Memberships:		Clear
Responsibilities:		Clear
Tests/Examinations:		Clear
Job Family:		
Recruiting Location:		
Country:	•	
State:		
City:		
Find Applicants Save Search Reset Search Basic Search Profile Match Search Tips		

Find Applicants (Advanced Keyword Search) page (2 of 2)

Note. The advanced search includes many of the same search criteria options as the database search and simple keyword search. This section describes only those page elements that are used exclusively for advanced searches.

Reset Search

For advanced keyword searches, resetting the search deselects the Search My Applicants check box.

Page Elements for Saved Searches

Delete Search	This button appears if you access the page by clicking the search name on
	the Saved Searches page. Click this button to delete the saved search.

Advanced Keyword Search

Match Applicants Using	Choose which search criteria an applicant must match:
	• Select <i>All Fields</i> to have Verity use Boolean AND logic that finds applicants that meet all of the specified search criteria.
	• Select <i>Any Field</i> to have Verity use Boolean OR logic that finds applicants that meet at least one of the specified search criteria.
	Note. These two types of searches produce different results even if all other search criteria is identical, and applicants who meet the criteria in both types of searches can receive different scores for the different types of searches. Also, scores assigned by the Advanced Search differ from those assigned by the Profile Match Search, which searches a different Verity collection and uses different Verity queries.

Resume-Related Search Criteria

Resume Text or Keywords	Enter any words or phases that you want the system to look for in applicant's resumes. The system searches for the keywords only in the resume section of applications. The resume can be either an attachment or text in the Resume Text field. The system does <i>not</i> look at any other application data.
Resume Language	The Verity search collections that contain resume text are associated with specific languages. Specify the language for the collection that you want to search.

Profile Selection Fields

Use these fields to select a profile that the system uses to prepopulate the profile-related search criteria fields further down the page. You can only use one profile.

Job Opening ID	Select a job opening ID, and the system enters items from the job opening's profile into the profile-specific search criteria fields on this page. This occurs regardless of whether profile utilization is activated on the Recruiting Installation - General page.
	If there is no profile content for the selected job opening, three additional check boxes appear on this page. Use these check boxes to indicate how to use the job opening in the search.
	Note. If you enter a job opening, use the Save for Compliance button to save your search results for auditing and statutory reporting purposes. The saved search and results can be tracked using the Manage Job Opening page: Activity & Attachments tab.
Emp ID (employee ID)	This field appears only if person profile integration is activated on the Recruiting Installation - General page.
	Select an employee ID, and the system enters items from the employee's primary profile into the profile-specific search criteria fields on this page.
	Recruiting administrators can select any employee. Other users can select only their own employee ID and the employee IDs of their direct reports, if any.
Profile ID	This field appears only if profile utilization is activated on the Recruiting Installation - General page.
	If you entered a job opening ID, this field displays the primary profile for the selected job opening and is read-only.
	If you entered an employee ID, the field displays the primary person profile for the employee and is read-only.
	If you have not entered either a job opening or employee ID, you can use this field to select any non-person profile to use to populate the profile- specific search criteria fields on this page.

Additional Job Opening Search Settings

These check boxes appear if you enter a job opening ID that is not associated with any profile content. Use the check boxes to indicate how to use the selected job opening ID in the search.

Display applicants in Applied status to the Job Opening	Select this check box to search for applicants who have applied for the specified job opening. If you use the delivered statuses, these are applicants whose disposition for the job opening is <i>Applied</i> .
Expressed interest in the same job family as the job opening is in	Select this check box to search for employees whose job applications list the job family to which the selected job belongs.
Keywords that match the job description	Select this check box to search applicant resumes for words that are in the primary job posting title.

Applicant Filtering	
Applicant Type	Select the check box next to the type of applicant to include in the search. You can select more than one. Options are:
	Internal Applicant
	External Applicant
	Non-Employee
	Note. If you do not select any of these check boxes, all types of applicants are included in the search.
Exclude Applicants	Select which applicant statuses are to be excluded from your search results. You can exclude more than one applicant status. Options are:
	• 010 - Active
	• 020 - Hired
	• 030 - Inactive
	• 040 – Queued
	Note. Because this search uses the Verity search collection, the search results include only applicants with the statuses that were selected at the time the collection was built, regardless of what status-based criteria you select in this field. For example, if the collection includes only active applicants, but you attempt to search for inactive applicants by excluding all statuses other than <i>Inactive</i> , then the search results will be empty.
Application Date Rangeto	Enter a date range within which the job application must have been entered into the system.
Referral-Related Search (Criteria
Referral Source	Select a referral source. The system limits the search results to applications

Referral SubSource	Select a referral subsource. The options in this field depend on the referral
	source that you selected.

that are associated with the specified source.

Qualification-Related Search Criteria

If you select a profile using the Job Opening ID, Emp ID, or Profile ID field, the system copies profile content items (specific qualifications, such as a specific competency or a specific degree) into these fields so that you can search for applicants with matching qualifications.

See <u>Chapter 16</u>, "Searching for Applicants," Understanding Profile-Based Searching in the Advanced Keyword Search, page 400.

Work Experience	Use this field to search for specific text in the Job Title Employer Name fields of applicants' work experience records.	
	Note. When the system populates this field based on a job opening ID that you enter, it enters the number of years of work experience from the job opening's Work Experience and Education matrix. However, the system does <i>not</i> search for applicants with the specified number of experience. You should clear the numerical defaults that appear in this situation.	
<profile content="" types=""></profile>	All fields between the Work Experience field and the Job Family field correspond to a profile content type that has been configured for use with Talent Acquisition Manger. For example, if Talent Acquisition Manager uses profiles to store competency, degree, and test/examinations data for job openings and applicants, then fields for those three profile content types appear on this search page.	
	See Chapter 3, "Setting Up Profile Integration," page 25.	
	If you selected a profile to use to prepopulate these fields (using the Job Opening ID field, the Emp ID field, or the Profile ID field), the system copies data from the source profile into the corresponding search criteria fields. You can edit this default text, or you can click the adjacent Clear button to remove this default data.	

Additional Search Settings

Job Family	Select a job family; the system searches for applications that list this job family.
Recruiting Location	Select a recruiting location; the system searches for applications that specify this location as either a first or second choice location.
Country, State, and City	Enter geographical search criteria; the system searches for applicants with primary addresses in the country, state, and city that you specify.

Search Results

The search results grid for an advanced keyword search is the same as the grid that shows the results of a simple keyword search.

Performing Profile Searches

Access the Recruitment Profile Match page (click the Profile Match link on the Find Applicants page.)

Recruitment Profile Match			
view Profile Match Search	criteria		
Recruiter Profile Search			
	the type of profile you want to match, and enter the specific Job Opening or Applicant ID that you want to match. Use the With field to choose the our search results.		
Use Saved Profile Match:	Select Search Search		
Match:	Job Opening Profile		
Job Opening ID:	503712 Manager-Operations		
With:	Applicant Profile		
Search Save Se	arch Reset Search Basic Search Advanced Search		

Recruitment Profile Match page: search criteria

21 Results Found						
Search	Results				First 🖪 Previous	Next 🕨 Last 🔛
Select	Score	Profile ID	Employee ID	Name	Take Action	
	35%	100754	K0G001	Rebekah Jones	Select Action	▲
	35%	100755	K0G003	Darlene Bergsten	Select Action	
	35%	100756	K0G005	Ginger Buckalew	Select Action	
	35%	100757	K0G007	Marilyn Drake	Select Action	
	35%	100758	K0G008	Clare Justin	Select Action	
	13%	100399	HXSSMGR01	Joan Falcone	Select Action	
	13%	210009	HXSPCEE26	Roy Kent	Select Action	
	13%	210020	HXCPEE07	Gina Gonzalez	Select Action	
	13%	210214	HXCPMJOBS2	Greg Bloomfield	Select Action	
	12%	100409	KG0009	Robin de la Camara	Select Action	
	12%	100462	LE0017	Felicia Rodriguez	Select Action	
	12%	100856	KU0119	Susan Hoinck	Select Action	
	12%	200030	HXJPM024	Lina Nayberg	Select Action	
	12%	200031	HXJPM025	Poonam Basky	Select Action	
	12%	210019	HXCPEE02	Penee Comet	Select Action	-
					First ■ Previous N	lext ⊫ Last 🕪
Select A	<u>II De</u>	eselect All	Compare	Group Action:	Select Action	Go
Save F	or Comp	liance				

Recruitment Profile Match page: search results for employees

Recruiter Profile Search

Use Saved Profile Match	This field appears if you have access to any saved profile searches. Select a saved search and click the Save button to perform the search. This list of available saved searches includes public searches as well as private searches that you created.
Match	Select the type of profile that you want to match: <i>Applicant Profile, Employee Profile, Job Opening Profile, or Non Person Profile.</i>
	For example, if you are searching for employees that match a particular job opening, then select <i>Job Opening Profile</i> .

[Profile ID]	Enter the unique ID for the profile that you want to match.
	The label for this field is Applicant ID, Employee ID, Job Opening ID, or Profile ID, depending on the type of profile you want to match.
	For security reasons, you cannot prompt for applicant IDs; instead, you must manually enter the ID.
	When selecting an employee ID, recruiting administrators can select any employee. Other users can select only their own employee ID and the employee IDs of their direct reports, if any.
With	Select the type of profile that you are searching for: <i>Applicant Profile</i> , <i>Employee Profile</i> , <i>Job Opening Profile</i> , <i>or Non Person Profile</i> .
	For example, if you are searching for employees that match a particular job opening, then select <i>Employee Profile</i>
	If you are matching a non-person profile, the only available options are <i>Job</i>
	Opening Profile and Non Person Profile.
	Important! When you search for job openings, only job openings with open postings are included in the search results. When you search for employees, only employees who do not already have applicant records are included in the search results.
	Important! When you search for job openings, only job openings with open postings are included in the search results. When you search for employees, only employees who do not already have applicant records are included in the search results.
Search	Important! When you search for job openings, only job openings with open postings are included in the search results. When you search for employees, only employees who do not already have applicant records are
Search Save Search	Important! When you search for job openings, only job openings with open postings are included in the search results. When you search for employees, only employees who do not already have applicant records are included in the search results.
	Important! When you search for job openings, only job openings with open postings are included in the search results. When you search for employees, only employees who do not already have applicant records are included in the search results. Click to perform the search and view results. After you have completed all three search criteria fields, click this button to

Search Results

The columns that appear in the search result grid vary depending on the type of profile. Many columns, such as the applicant ID, type, and name or the employee ID and name, simply provide identifying information. This section does not discuss those fields.

Select

Select this check box to include the row when you perform a group action or when you click the Compare button to review a detailed profile comparison.

Score	Displays a score that represents how closely the application matches your search criteria. The Verity search engine assigns this score.	
	Note. Scores for a particular pair of profiles can vary depending on the search direction. A simplified example of this is if a job opening lists five competencies and the applicant has four of them. The job opening has 100% of the applicant's competencies, but the applicant has only 80% of the job opening's competencies.	
	See "Verity Functionality in Recruiting Solutions" 9.1 red paper posted to My Oracle Support	
Resume and Application	These columns appear only if you searched for applicants. Click the icons in these columns to open new windows where you can review the applicant resume and application.	
	If no resume exists for a particular applicant (for example, the applicant instead completed the work experience fields in the online application), then this column is blank.	
	If none of the applicants in the grid have resumes, the entire Resume column is hidden.	
Former Employee	This field appears only if you searched for applicants. An icon appears if the application indicates that the applicant is a former employee; the column is blank otherwise. The system does not verify this information.	
	If none of the applicants are former employees, the entire column is hidden.	
Take Action	Select an action you want to take for the selected applicant or employee.	
	These actions are available for applicants: Add Applicant to New List, Add Applicant to Saved List, Change Applicant Status, Forward Applicant, Link Applicant to Job, Print Application Details, and Send Correspondence.	
	See <u>Chapter 22, "Managing Applicants," Actions in the Take Action Field, page 603.</u>	
	There is only action available for employees: <i>Invite Application</i> . This action is available when you search for employee profiles that match a job opening profile or when you search for job opening profiles that match an employee profile. When you select this option, the system sends the employee an email invitation to apply for the job opening. The text of the email comes from the <i>HRS_INVITE_APPLICATION</i> generic template. Only employees for whom you have email addresses can be invited to apply.	
	See PeopleTools: Workflow Technology PeopleBook	

Additional Page Elements for Performing Actions

Group Action and Go	Select an action to be performed on all selected applicants. Unlike actions performed on a single applicant using the Take Action field, the system does not perform the action immediately. Instead, you must click theGo button to initiate the selected action.	
	In this context, the available group actions are the same as the available individual actions.	
Compare	Click to access the Compare Results page, where you can see detailed information about each content item in the source profile and you can see how well each selected profile matches each content item.	

Reviewing Profile Match Details

Access the Compare Results page (click the Compare button on the Recruitment Profile Match page)

Note. When you access this page after selecting only one row from the search results, the page title is Match Result.

Compare Results				
Select One or 'View All Sections' to o profile you selected and the matchin profile results that were marked pre-	g applicant, job opening, employ			
View All Sections	V = Pa	nd o Match artial Match otal Match		
Compare Results				
Search Criteria: - Manager- Operations	John Pak: 82%	Stanley Lowe: 46%		
Competencies	Competencies	Competencies		
Ability to prioritize tasks :	•100%	100%		
Proficiency: 3-Good	3-Good 3-Good			
Organize people and goal tasks :				
Proficiency: 5-Expert	3-Good	3-Good		
Resource Planning :	∀93%	∀93%		
Proficiency: 2-Fair	3-Good	3-Good		
Persuasive :	∀93%	∀93%		
Proficiency: 4-Very Good	3-Good	3-Good		
Business Planning :	∀93%	0%		
Proficiency: 4-Very Good	3-Good			
Achievement Orientation :	chievement Orientation : V93%			
Proficiency: 4-Very Good				
Practices ethical behavior :	100%	0 %		
Proficiency: 3-Good	3-Good			
 School Education 	 School Education 	 School Education 		
Professional Education :	0%	0%		

Compare Results page

The first column displays the content sections and content items in the source profile (the one that the search results were compared to). The remaining columns show the corresponding data in the profiles that you selected for comparison.

View Section

Select *View All Sections* to list all the sections in the profiles, or select a section to view the information for one content section. The default is View All Sections.

Using AIRS to Search the Internet for Applicants

Access the Find Applicants page (Recruiting, Find Applicants, Find Applicants).

To search the internet:

- 1. Select the AIRS link on the Find Applicants page.
- 2. On the AIRS Oxygen website, enter your search criteria and start the search.

3. Check the applicants returned by AIRS and identify potential candidates.

You can save details of applicants that you plan to contact using the AIRS Oxygen options Save to Folder and Save to Disk.

- 4. Contact the applicants identified by the search to find out if they are interested in applying to your organization.
- 5. Load the applicants' details into your PeopleSoft database as follows:
 - a. Navigate to the AIRS Oxygen website and display the applicant information.
 - b. Click the Save to Talent Acquisition Manager link.

The AIRS system displays the default email address previously set up. Accept the default address.

AIRS Oxygen emails the selected applicants' resumes to your resume processing account. The resume processing extracts applicant data from the resume and inserts it into the applicant data tables.

Working With Saved Searches

This section provides an overview of saved searches and discusses how to:

- Save search criteria and automatch searches.
- Save search results.
- View saved searches.
- Run automatch saved searches

Understanding Saved Searches

This overview describes options for saving searches and search results.

Note. The basic database search for applicants does not support saved searches. This discussion of saved searches applies only to the three Verity-based searches.

Types of Saved Searches

The following table summarizes the types of saved searches and lists which search types support each one:

Saved Search Type	Description	Supported Searches	
Criteria	Save criteria so that you can re-run the search on demand.	Resume and keyword searchAdvanced keyword searchProfile Match search	

Saved Search Type	Description	Supported Searches	
Automatch	Save criteria so that an automated process can perform the search on a regular schedule and send you any new search results each time it runs.	Resume and keyword searchAdvanced keyword search	
Compliance	Save search results as a static list.	 Resume and keyword search Advanced keyword search Profile Match search 	

Criteria Searches

To save search criteria, use the Save Search button that appears in the same group box as the search criteria. The system saves the criteria under a name that you assign. You can select and run a saved search from the page where you would normally run the search or from the Saved Searches page.

The saved search appears on the Saved Searches page with the results type Criteria

Note. On the Recruiting Installation - Job page, you can make it mandatory to save search criteria when a specific job opening is part of the criteria. When this option is active, the system forces the save by displaying the Save Search page after the user initiates the search but before the search results appear. The user cannot continue to the results without saving the criteria, even if there are no search results. The user can, however, cancel to return to the search page without executing the search.

See Chapter 2, "Defining Installation Options for Recruiting," Defining Job-Related Settings, page 15.

Automatch Searches

When you save search criteria, you can mark the saved search as an automatch search to be run in batch at regularly scheduled times. The Run Automatch Search (HRS_AM) process performs the searches and sends the search results to the search owner, who can then view the results of the Automatch search and take appropriate action. The system keeps track of which applicants have already been sent to the search owner, so each time the automatch search runs, it sends only the applicants that have not been previously sent.

When you save an automatch search, you can specify a specific end date after which the search becomes inactive. Or, if the search criteria includes a specific job opening, you can specify that the search becomes inactive either when the job opening is closed or on the last posting close date.

The saved search appears on the Saved Searches page with the results type Automatch.

Note. This option is not available for profile match searches.

Results Saved for Compliance

For auditing and statutory reporting purposes, you can save the results of specific searches. To save search results, use the Save for Compliance button. This button normally appears below the search results grid for the three Verity-driven searches (Resume and Application searches, Advanced Keyword Searches, and Profile Match searches). However, if the Recruiting Installation option to enforce saved searches is active, then after a forced save, the Save for Compliance button appears above the search results, along with a reminder message.

The saved search appears on the Saved Searches page with the results type Compliance.

Once you save a set of search results, you cannot delete it.

Note. Although the original search results grid can include separate rows for each application that meets the search criteria, the saved results show only one row per applicant per application date. That is, if an applicant submits multiple applications on the same date, the original search results show a row for each application, but the saved results show one row for the date.

Public vs Private Searches

Saved searches can be designated as either public or private. Although anyone can run a public search, only administrators and the creator of the search can update or delete the search criteria.

Persistent Association With A Job Opening

The following saved searches are associated with specific job openings:

- Automatch searches where the search criteria includes a specific job opening.
- Compliance searches where the search criteria includes a specific job opening.
- Criteria searches that are created as a result of the Recruiting Installation setting that forces users to save search criteria that includes a specific job opening.

The Saved Searches page shows which job opening, if any, is associated with each saved search

The Job Opening page also lists all of the saved searches that are associated with the job opening. The list appears in two locations:

- In the Related Searches grid on the Job Opening page: Activity & Attachments tab.
- In the Saved Searches & Automatches grid on the Job Opening page: Find Applicants tab.

Pages Used to Work With Saved Searches

Page Name	Definition Name	Navigation	Usage
Save Search (save search criteria)	HRS_REC_SAV_SCH	Recruiting, Find Applicants Enter criteria for any type of search other than a database search, then click the Save Search button that appears with the search criteria on the Find Applicants page.	Save applicant search criteria.
Save Search (save search results)	HRS_REC_SAV_RSL	Recruiting, Find Applicants Perform any type of search other than a database search, then click the Save for Compliance button that appears with the search results.	Save search results for auditing and statutory reporting purposes.
Saved Searches	HRS_REC_SEARCHES	Recruiting, Saved Searches, Saved Searches	Review saved searches, and either run them or review the results, depending whether the criteria or results were saved.
Compliant Results Automatch Results	HRS_REC_SCHRSLTS	Click the View Results button for a compliance or automatch search on the Saved Search page.	View saved search results.
Run Automatch Search Agent	HRS_RUN_AMH	Recruiting, Administration, Run Automatch Search, Run Automatch Search Agent	Run the Run Automatch Search (HRS_AM) process to search for applicants that meet the criteria in automatch searches.

Saving Search Criteria and Automatch Searches

Access the Save Search page (on the Find Applicants page, click the Save Search button).

Save Search	
Save Search	
*Search Name:	JO 900014
Job Opening ID: Status: Access:	900014 Active Public Setup as Auto match
Automatch Options	
End Search Agent on: End Date:	End on Max Posting Close Date
Save Return to previous page	

Save Search page (for saving search criteria)

Search Name	Enter a name for the saved search. This name identifies this saved search on the Saved Searches page.				
Job Opening ID	If the search criteria that you are saving included a job opening; the field displays the job opening ID. You cannot change this value. If a job opening ID appears, the saved search will retain an association with that job opening. The association ensures that the search is listed on the Job Opening page under both the Activity & Attachments tab and the Find Applicants tab.				
Access	Select the access type for this search. Options are:				
	• <i>Private:</i> Only the creator of the search can access, modify, or delete this search.				
	• <i>Public:</i> Anyone can access this search, but only the creator or an administrator can modify it or delete it.				
Setup as Auto match	Select this check box to create an automatch search that will be processed by the Run Automatch Search process.				

Automatch Options

This group box is visible if the Setup as Automatch check box is selected. Use the fields in this group box to control how long the automatch search remains active.

End Search Agent On and End Date	If the automatch search includes a job opening, select from these options: End on Max Posting Close Date, End on Job Opening Close Date, or End on Specified Date.
	If the automatch search does not include a job opening, the system selects <i>End on Specified Date</i> and the field becomes read-only.
	If the End Search Agent On field is <i>End on Specified Date</i> , then enter the date on which the automatch search expires.

Saving Search Results

Access the Save Search page (on the Find Applicants page, click the Save for Compliance button).

Save Search	
Save Search	
*Results Set Name:	
Job Opening ID:	503712
Access:	Public
Save <u>Return to Pre</u>	vious Page

Save Search page (for saving search results)

Results Set Name	Enter a name for the saved search results. This name identifies this saved search on the Saved Searches page.				
<profile id=""></profile>	If the search criteria identified a job opening, employee ID, or non-person profile, this read-only field displays the selected value. The field label changed depending on the type of profile shown.				
	If the search criteria did not identify a job opening, employee ID, or non- person profile, this field is hidden.				
	If you save a search that is associated with a job opening, the saved search will retain an association with that job opening. The association ensures that the search is listed on the Job Opening page under both the Activity & Attachments tab and the Find Applicants tab.				
Access	Select the access type for this search. Options are:				
	• <i>Private:</i> Only the creator of the search can access this search.				
	• <i>Public:</i> Anyone can access this search.				

Viewing Saved Searches

Access the Saved Searches page (Recruiting, Saved Searches).

Saved Searches								
Target Profile Type								
Saved Searches & A	utomatches			<u>Cu</u>	<u>stomize F</u>	ind View All	E First T-10 c	of 10 🖻 Last
Search Name	Results Type	Search Type	Last Updated	Job Opening	Туре	Active	Run Search	Delete
<u>ADMIN</u> OPPORTUNITY	Criteria	Advanced	2009-08-09	None	Public	Yes	Search	Î
COMPUTERS	Automatch	Advanced	2009-08-22	None	Public	Yes	View Results	Î
EXAMP.2-EMPS NOT APP	Criteria	Profile	2009-08-09	None	Public	Yes	Search	Î
EXAMPLE SEARCH/MATCH	Criteria	Profile	2009-08-09	None	Public	Yes	Search	Î
HRIS IN OAKLAND	Criteria	Advanced	2004-09-29	None	Public	Yes	Search	Î
JO503712 - MANAGER	Compliance	Advanced	2009-08-22	None	Public	Yes	View Results	
SEARCH J.O. 500002	Criteria	Advanced	2009-08-09	None	Public	Yes	Search	Î
TECH SF	Criteria	Advanced	2004-09-29	None	Public	Yes	Search	Î
CALIFORNIA SEARCH	Criteria	Advanced	2004-10-05	None	Public	Yes	Search	Î
COLORADO SEARCH	Criteria	Advanced	2004-10-05	None	Public	Yes	Search	Î
Find Applicants								

Saved Searches page

Saved Searches and Automatches

This grid lists public saved searches as well as private saved searches that you created. You cannot see other users' private saves searches.

Search Name	Displays the name of the saved search. If you are the owner or administrator of a saved criteria search or automatch search, the name is a link that you click to access the Find Applicant page in a mode where you can edit the search criteria and save your changes.				
	Note. When you access the Find Applicants page from the Saved Searches page, the fields for defining the saved search appear on the Find Applicants page. Use these fields, and the additional Save Changes and Delete Search buttons, to modify or delete your saved search.				
Results Type	Displays <i>Criteria</i> , <i>Automatch</i> , or <i>Compliance</i> to indicate the type of saved search.				
Search Type	Displays <i>Basic,Advanced</i> , or <i>Profile</i> to indicate which mode the Find Applicants page was in when you entered the search criteria or performed the search.				
	Basic searches refer to the keyword and resume search. (The other search on the Basic Search page is the database search, which does not support saved searches.)				
Job Opening	For searches that are associated with a specific job opening, this field identifies the job opening and provides a link to the Job Opening page.				
	For other searches, this field displays None.				
Туре	Displays <i>Public</i> or <i>Private</i> to indicate who has access to the search. The only private searches that appear in the grid are the ones that the current user created.				
Run Search	For criteria searches, a Search button appears. Click this button to run the search and view results on the Find Applicants page.				
	For automatch searches, a View Results button appears. Click this button to view the results from the last time the search was processed.				
	For compliance searches, a View Results button appears. Click this button to view the saved results.				
Additional Page Element					

Find Applicants	Click this button to access the Find Applicants - Advanced Keyword Search
	page.

Running Automatch Saved Searches

Access the Run Automatch Search Agent page (Recruiting, Administration, Run Automatch Search, Run Automatch Search Agent).

The Run Automatch Search (HRS_AM) process searches the applicant database for applicants that match the criteria in all saved automatch searches.

When the system finds an applicant that matches the criteria, a workflow sends emails to the recruiters responsible for the requisitions. Recruiters can view the results of the Automatch search and then link the applicants to the job opening.

See Chapter 16, "Searching for Applicants," Understanding Saved Searches, page 423.

Chapter 17

Screening and Routing Applicants

This chapter provides an overview of the screening, process, lists prerequisites, and discusses how to:

- Evaluate answers to open-ended screening questions.
- (USF) Run the priority placement process
- Review and rate applicants
- Run screening levels and apply results.
- (USF) Rank applicants and generate the certificate of eligibles
- Route applicants.

Understanding the Screening Process

Screening is the process used by recruiters to evaluate a list of potential candidates and narrow the list to a few qualified applicants.

Process Overview

The basic screening process involves these steps:

- 1. Review and rate applicants.
 - a. Review the list of applicants.
 - b. Review applicant competency and accomplishment ratings, and add ratings where they don't yet exist.

An applicant who is not rated does not meet the screening criteria.

Note. If you use open-ended questions during the screening process, you must also ensure that applicants' answers have been evaluated. Although the evaluation process takes place outside of the screening pages and therefore is not included in this list, it is a necessary prerequisite for optimum screening results, similar to adding ratings for competencies.

- 2. Run and apply screening levels:
 - a. Review the screening levels for the job

You can review both the overall list of screening levels and the detailed screening criteria and processing rules for individual screening levels. You can optionally update the screening level details.

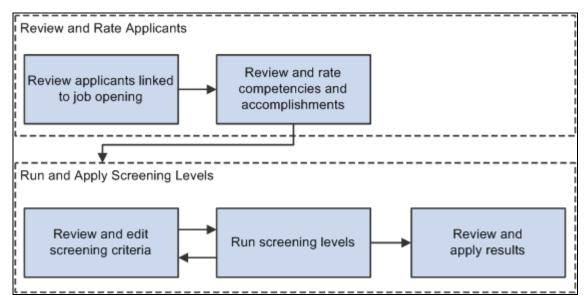
b. Run the screening levels.

This process applies the screening level settings to specific applicants to produce a pass/fail result and an overall score. You can change screening criteria and rerun the screening levels as many times as you like before continuing to the next step.

c. Review and apply the results.

Review the pass/fail results, the overall score, and detailed information about how the score was figured. When you are satisfied with the results, applying them updates applicant dispositions according to the screening level rules.

The following diagram illustrates these steps:



Basic process flow for applicant screening

At the conclusion of this process, you are ready to continue to the routing process, where you can seek an opinion from any person in the system regarding suggested future actions.

(USF) Extended Process for Federal Users

The screening process for U.S. federal government jobs involves some additional steps:

1. At the beginning of the process, you run the RS - Priority Placement (HRS_PRI_PLCM) Application Engine process to automatically add priority placement applicants to the job opening.

The RS - Priority Placement process adds applicants with a priority placement code *and* salary grade and level that match the job opening. The priority placement code by itself is not sufficient.

2. After you finish running screening levels and applying results, you rank applicants and generate the Certificate of Eligibles.

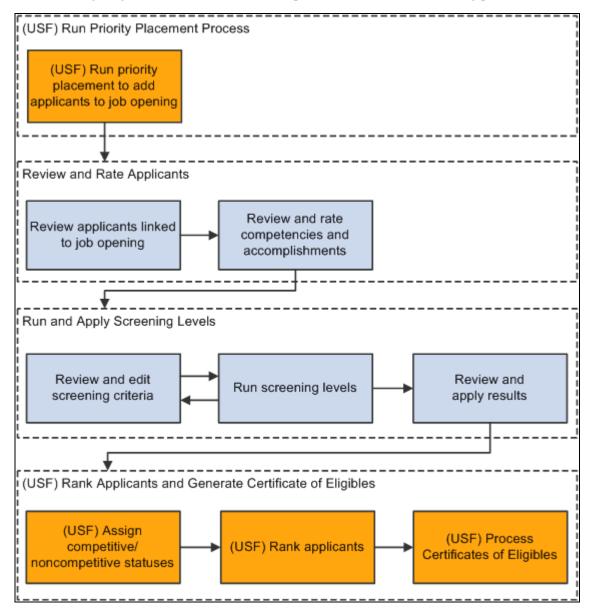
To accomplish this, you need to:

a. Assign competitive/non-competitive statuses to applicants.

Applicants without a competitive/non-competitive status are excluded from the ranking process.

- b. Rank applicants according to their cumulative screening scores, augmented by preference items.
- c. Generate a Certificate of Eligibles listing the ranked applicants.

The following diagram shows the additional steps in the U.S. federal screening process:



Additional steps for U.S. federal screening processes

Prerequisites

There are two types of prerequisites for screening processing.

First, there are implementation tasks, during which you create reusable definitions that are referenced in individual job openings and applications.

Screening-related implementation tasks include:

- 1. (USF) Defining veteran preference codes.
- 2. (USF) Defining priority placement codes.
- 3. Creating screening level definitions.
- 4. Creating screening templates and linking them to recruitment templates.

Then, at runtime, you need to add job-specific screening criteria to each screening level that will be used.

This process involves selecting specific qualifications, questions, and job attributes to look at when assessing applicants. When you define screening criteria for a job opening, you can also review and override default settings from screening level definitions.

See Also

Chapter 5, "Setting Up Screening Processes," page 59

Chapter 9, "Setting Up Recruiting Templates," page 131

Chapter 13, "Creating Job Openings," Defining Screening Level Rules and Criteria, page 298

Evaluating Answers to Open-Ended Screening Questions

This section provides an overview of open-ended question evaluations and discusses how to:

- Review questions to evaluate.
- Assign scores to answers.

Understanding Open-Ended Question Evaluations

When you associate an open-ended question with a job opening, you also assign evaluators for the question.

When the system receives an application with answers to open-ended questions, it sends notifications to the assigned evaluators, advising them of the need to assess the answers. Only the assigned evaluators can award an applicant points for the answer.

Unevaluated answers do not receive any points during screening. When reviewing screening results, you can review an applicant's questionnaire to ascertain whether there are unevaluated open-ended questions that affected screening results.

Note. If your organization uses PeopleSoft HCM Portal Pack, recruiters can also use the Recruiter Alerts pagelet and the Unevaluated Answers page to send reminder notifications to evaluators.

See Also

PeopleSoft HRMS Portal Pack 9.1 PeopleBook, "Using HRMS Portal Pack Pagelets," Viewing Recruiter Alerts for Talent Acquisition Manager

Pages Used to Evaluate Open-Ended Questions

Page Name	Definition Name	Navigation	Usage
Evaluate Open Ended Questions	HRS_EVAL_ANS_LST	Self-Service, Recruiting Activities, Evaluate Open Ended Questions, Evaluate Open Ended Questions	Review a list of open-ended questions whose answers you have been assigned to evaluate.
Evaluate OE Answers (evaluated open ended answers)	HRS_EVAL_ANS_SEC	Click the Reference Number link in the Answers to be Evaluated grid on the Evaluate Open Ended Questions page.	Assign scores to answers for open-ended questions.

Reviewing Questions to Evaluate

Access the Evaluate Open Ended Questions page (Self-Service, Recruiting Activities, Evaluate Open Ended Questions).

Evaluate Open Ended Questions						
Listed Below are answers to open ended questions for applicants for a particular Job Opening. Select the Reference Number on the desired grid row to see the details and provide a score for each applicant that has anwered. When an evaluation for an answer is complete, choose the Submit button to release questions for screening. To store assigned score, but not submit questions at this time, choose the Save button. Answers to be Evaluated Customize Find Image:						
Reference Number	Created	Points Given	Evaluated	Recruiter		
30013015003951034	05/31/2009 2:09PM	3				
30013215003951034	05/31/2009 2:25PM					

Evaluate Open Ended Questions page

The Answers to Be Evaluated grid includes a row for each answer that the user has been assigned to evaluate. Once the evaluator has submitted an evaluation, the row disappears from the grid.

Reference Number	The system identifies answers to be evaluated using a reference number rather than providing identifying information for the applicant or job opening. This helps ensure non-biased evaluations.
	Click the reference number to access the Evaluate OE Answers page, where the evaluator assigns points to the answer.
Points Given	If an evaluator has saved points but not yet submitted them, the point value appears in this column. The column is empty for questions where the evaluator has not saved a point value.
Evaluated	Displays a deselected check box to indicate that the evaluation is not complete.
Recruiter	Displays the primary recruiter, if any, for the job opening with which the question is associated.

Assigning Scores to Answers

Access the Evaluate OE Answers page (click the Reference Number link in the Answers to be Evaluated grid on the Evaluate Open Ended Questions page).

Evaluate OE Answers						
Reference Number: 30012915003951034 Question: Please discuss in a short essay the protocols you would establish in a newly formed Burns Unit in a rural hospital.						
 Applicant Answer: 1. Perform primary assessment and re-assess as needed according to patient's acuity level. 2. Treat any life-threatening occurrence immediately, i.e., CPR. 3. Perform secondary assessment and reassess, as needed according to patient's acuity level. 4. Assist MD in burn assessment (Total Body Surface Area (TBSA) and depth of burn) using burn assessment chart (¿Rule of Nines¿). 5. Assess possibility of chemical exposure. 6. Remove clothing/jewelry (especially rings). 						
Maximum Points:	5 Total Words: 67 Enter Evaluation Points:					
Jave	Califer					

Evaluate OE Answers page

Question and Applicant Answer	Displays the full text of the question along with the applicant's answer to provide context for the evaluator's assessment.
Maximum Points	Displays the maximum points that the evaluator can award the applicant for this answer.
Enter Evaluation Points	Enter the number of points to be awarded to the applicant for this answer. Refer to the Maximum Points for the question to determine the rating scale for points.
Save, Submit, and Cancel	Click Save to save the evaluation points without submitting the evaluation. Return to the page later to submit a final evaluation.
	Click Submit to submit evaluation points. Once you submit an evaluation, the answer no longer appears in the Answers to Be Evaluated grid on the Evaluate Open Ended Questions page.
	Click Cancel to return to the Evaluate Open Ended Questions page without saving changes.

(USF) Running the Priority Placement Process

This section provides an overview of the priority placement process and discusses how to:

- Run the priority placement process for one or many jobs openings.
- Run the priority placement process from the context of a specific job opening.

Understanding the Priority Placement Process

Applicants with priority placement are entitled to automatic consideration for job openings that meet certain criteria, even if the applicant hasn't specifically applied for the job opening. Use the RS - Priority Placement (HRS_PRI_PLCM) Application Engine process to identify those applicants and link them to job openings that have the same priority placement code.

The Priority Placement process identifies priority placement applicants that have the same Pay Plan and Occupational Series as the job opening that is being processed. It also ensures that the applicant's Salary Grade is equal to or greater than the grade specified on the job opening. The process then compares those applicants with active job openings that have that priority place code.

When an applicant has two priority placement codes for a particular job, and only one priority placement code method can be considered for that job series, the process determines which code to use by looking at the recruiting type (*Internal, Merit Promotion,* or *Open Competition*) that was defined on the job opening.

The Priority Placement process links applicants to job openings with an initial disposition of *Applied*. Once linked to the job opening, the applicant goes through the same screening process as other applicants.

Note. Run the Priority Placement process after the closing date of the job posting and before running other screening processes.

Page Name	Definition Name	Navigation	Usage
Process Priority Placement	HRS_RUN_PR_PL	Recruiting, Administration, Process Priority Placement, Process Priority Placement	Run the RS-Priority Placement process on one job opening or all open job openings.
Screen Applicants	HRS_JO_SCR_LIST	Recruiting, Find Job Openings, Find Job Openings Click the job opening link in the Search Results group box on the Find Job Openings page. Click the Screen Applicants link on the Job Opening page: Manage Applicants tab.	Run the priority placement process for the job opening from which you accessed this page.

Pages Used to Run the Priority Placement Process

Running the Priority Placement Process for One or Many Job Openings

Access the Process Priority Placement page (Recruiting, Administration, Process Priority Placement, Process Priority Placement).

Process Priority Placement			
Run Control ID: 1	<u>Report Manager</u>	Process Monitor	Run
Run Options			
All Open Job Openings			
Job Opening ID:			

Process Priority Placement page

All Open Job Openings	Select this check box to run the RS - Priority Placement process on all job openings with an <i>Open</i> status. If you select this check box, the Job Opening ID field is unavailable.
Job Opening ID	If you do not select the All Open Job Openings check box, enter the ID for a single job opening that you want to process.

Run

Click to access the Process Scheduler Request page, where you schedule the process.

Running the Priority Placement Process from the Context of a Specific Job Opening

Access the Screen Applicants page (click the Screen Applicants link on the Job Opening page).

See <u>Chapter 17</u>, "Screening and Routing Applicants," Reviewing Applicants Linked to Job Openings, page <u>443</u>.

To run the Priority Placement (HRS_PRI_PLCM) process:

- 1. In the Run field, select Priority Placement.
- 2. Click the Go button,
- 3. After the process finishes, click the Refresh icon.

To see the progress of the process, click the Process Monitor link to access the Process Monitor page.

If the process identified applicants who are entitled to priority placement for this job opening, their names now appear in the Applicants grid.

Reviewing and Rating Applicants

This section provides an overview of applicant ratings and discusses how to:

- Review applicants linked to job openings.
- Rate applicants.

Understanding Applicant Ratings

During the screening process, you can review the list of applicants linked to a job opening and, more specifically, see which applicants do not yet have ratings for competencies or other rated qualifications.

The system enables you to rate applicants at any time. For example, if your business process uses a preliminary screening level to filter out applicants who do not meet minimum requirements, then a second screening level that assesses rated qualifications, then it makes sense to rate applicants after running the first screening level so that you can avoid spending time rating applicants who do not meet your minimum qualifications.

Important! When a screening process includes qualifications that use ratings, unrated applicants do not receive any points for those qualifications.

The Rate Applicant page summarizes the applicant data for certain types of job qualifications—those that are implemented through the use of profile content types. The page displays a grid for each content type that is included in the job opening template, regardless of whether the job opening includes any related content items. For example, if the job opening template includes the Degrees content item, then the Rate Applicant page includes a Degrees grid regardless of whether you screen for degrees and regardless of whether the job opening even lists any degrees.

Within each grid, the page lists any specific qualifications that are being used as screening criteria. For example, the Competencies grid lists the specific competencies that are used in screening.

For each qualification, the page shows the related applicant data. This information is presented differently for rated and unrated content types:

• For rated content types such as competencies, you see the applicant's rating and its screening point value.

If the rating field is empty, the applicant is unrated, and you should add rating information to the application.

When you access the application from the Rate Applicants page, the Copy Limited Items from Job Openings button enables you to quickly add all of the unrated competencies to the application. You still need to open each competency to enter a rating.

• For unrated content types such as degrees, you see the points that the applicant will earn.

If the points field is empty, the applicant does not meet the criteria. This could be because the necessary information was not entered in the application, or it could be because the applicant truly does not have the qualification.

The Rate Applicant page provides direct access to the Application Details page, where you can add any necessary information to the application.

Page Name	Definition Name	Navigation	Usage
Screen Applicants	HRS_JO_SCR_LIST	Recruiting, Find Job Openings, Find Job Openings Click the job opening link in the Search Results group box on the Find Job Openings page. Click the Screen Applicants link on the Job Opening page: Manage Applicants tab.	Review applicants linked to a job opening and perform various tasks related to screening.
Rate Applicant	HRS_RATE_APP	Click the Rate link on the Applicants group box on the Screen Applicants page.	Review applicant data that corresponds to the criteria for a specific screening level.

Pages Used to Review and Rate Applicants

Reviewing Applicants Linked to Job Openings

Access the Screen Applicants page (click the Screen Applicants link on the Job Opening page: Manage Applicants tab).

Job Opening	Job Opening						
Screen Applica	nts						
Posting Title: Web Developer Job Opening ID: 10041 Job Opening Status: 010 Open Job Type: Standard Position Number: 19143002 Web Developer Business Unit: NSWBU Swiss Hotels Job Family:							
Save Return to Job Opening View All Applicants View Screening Levels View Screening Results Run: Select Go Rank Applicants							
Applicants				Customize Find	View All 🔽	First 🗹	1-5 of 5 🖸 Last
Name	ID	Disposition	Status Date	Туре	Resume	Application	Rate
Justin Curtis	100016	Applied	10/11/2004	External Applicant	Ē		<u>Rate</u>
Christopher Boardma	<u>n</u> 100017	Applied	10/11/2004	External Applicant			Rate
Genevieve Jackson	100018	Applied	10/11/2004	External Applicant		1	Rate
Stuart O'Neill	100019	Applied	10/19/2004	Employee	Ē	1	Rate
Adrienne Turner	100021	Applied	10/11/2004	Employee	Ē		Rate
Run: Select Go Rank Applicants Select All Deselect All Route Applicant Merge Applicant							

Screen Applicants page

Print Job Opening	Click to access the Select Job Opening Sections page, where you configure and generate a printed version of the job opening data.		
	See <u>Chapter 21, "Managing Job Openings," Printing Job Openings, page</u> 595.		
View All Applicants, View Screening Levels and View	Use these links to access the indicates screening pages. The link for the current page is disabled.		
Screening Results	Note. The View Screening Results link is visible only after a screening level has run successfully and the page has been refreshed.		
Run and Go	The drop-down list box for the Run field lists the screening levels for the job opening. Select the screening level you want to run and click the Go button to begin running it. The system uses the RS-Job Opening Screening (HRS_JO_SCR) Application Engine process to screen applicants using the screening criteria for the selected screening level.		
	To monitor the progress of the screening process, click the Process Monitor link to open the Process Monitor page. It is convenient to be able to see when the process is complete because after the process finishes, you need to refresh the page to make the process results appear.		
	Note. (USF) In U.S. federal implementations, you can also use these fields to run the priority placement process for this job opening. The Run field includes a <i>Priority Placement</i> option that you can select and run. The Priority Placement process identifies applicants who are eligible for any of the job opening's priority placement programs and links them to the job opening. The federal screening process requires you to run the priority placement process before running any screening levels.		
ф	Click the Refresh icon after a screening level finishes running. Refreshing the page is necessary to make the screening level results appear.		
(USF) Rank Applicants	This button appears only if screening results exist. Click the button to display the Rank Applicants page.		
	See <u>Chapter 17, "Screening and Routing Applicants," Ranking Applicants, page 467.</u>		

Applicants

This grid lists all applicants linked to the job opening.

Name and ID	These fields display identifying information about the applicant. Click the
	name link to access the Manage Applicant page.

Disposition and Status Date	 These fields display the applicant's disposition for the current job opening and the effective date of that status. After you apply the results of a screening level, the system updates the disposition to either the passing status or the failure status for the screening level. Note. When you run a screening level, the system process only applicants whose dispositions are configured as open statuses associated with either the <i>1-Review</i> phase, the <i>2-Applied</i> phase, or no phase at all. This prevents applicants in the later phases of the recruiting process (<i>3-Screen, 4–Route, 5-Interview, 6-Offer, 7-Hire, or 8-Reject</i>) from being processed. 				
	See <u>Chapter 4, "Setting Up Recruiting Statuses," Defining Statuses and</u> <u>Reasons Codes, page 50.</u>				
Туре	Displays <i>Employee</i> , <i>External Applicant</i> or <i>Non-Employee</i> . Non-employees are persons of interest who have records in your human resources system but are not employees.				
Resume	Click to open a new window that displays the applicant's resume.				
	• If the resume is an attachment, the file opens in the new window.				
	• If the resume was entered as text, the new window displays the Applicant Resume page.				
	• If no resume exists for a particular applicant (for example, the applicant instead completed the work experience fields in the online application), then this column is blank.				
	If none of the applicants in the grid have resumes, the entire Resume column is hidden.				
Application	Click to access the Application Details page, where you can review or the applicant's application for this job opening.				
	Before you run a screening level, you might need to update the application details with information such as competency ratings that the screening level is configured to evaluate.				
Rate	Click to access the Rate Applicants page, where you can review applicant data for the criteria in each screening level. For example, if the screening level looks for a specific competency and a specific language skill, the Rate Applicant page displays the applicant's ratings for each area. If the applicant is unrated, you need to go to the Application Details page to add the ratings.				

Page Elements for Performing Applicant Actions

In the Applicants grid, the first column is a check box that you select to choose applicants to be included when you use these page elements.

Route Applicant	Click this link to route the selected applicants. See <u>Chapter 17, "Screening and Routing Applicants," Routing Applicants, page 473.</u>
Merge Applicant	Click this link to access the Review Duplicate Applicants page, where the selected applicants appear as a set of duplicates for you to review and optionally merge.
	See <u>Chapter 22, "Managing Applicants," Identifying and Merging</u> <u>Duplicate Applicant Records, page 674.</u>

Note. When you run a screening level, the system does not limit screening to selected applicants.

Rating Applicants

Access the Rate Applicant page (click the Rate link on the Screen Applicants page).

Screen Applicant	S					
Rate Applica						
	Otto Waalkes					
	3			1	1	
lob Opening:	500432 Adminis	strator-HR				
Save Cance	Previous	Applicant <u>Next Applica</u>	nt I <u>Return</u>	to Previous Page		
Screening Levels				V	íew All F	<u>irst</u> 🚺 3 of 4 🕨 L
Description:	Preliminary					
Areas of Study	reminidiy					
	for the Areas of Study section.					
 Competencies Content Items Det 	aila				7	
Content items bet			<u>Cu</u> :	stomize View All 🖁	First	
Item	Item Description	Evaluation Type	Rating	Score	Points	Required
Teamwork and cooperation	Proficiency	Approved/Official			5	
Develop & implement solutions	Proficiency	Approved/Official	4-Very Good	4	5	
L	1		1			
- Degrees						
Content Items Det	ails	Customize	View All	First K 1 of 1 D	Last	
Item	Item Description	Rating Score		nts Required		
Bachelor of Arts	Degree		4	4		

Rate Applicant page (1 of 2)

Content Items Deta	ails	<u>Cus</u>	tomize View All 🗗	First 🗹	1-2 of 2 🕨 Las
ltem	Item Description	Rating	Score	Points	Required
English	Speaking Proficiency	3 - High	3	3	
English	Writing Proficiency	3 - High	3	3	
✓ Memberships					
Content Items Deta	ails	C	ustomize View All	م First	1 of 1 🕨 Las
Item	Item Description	Rating	Score	Points	Required
	Membership			4	
North American Payroll Assoc.	Membership			4	Γ
Payroll Assoc. ▼ Tests/Examination	ons			4	
Payroll Assoc.	ons	<u></u>	ustomize View All		
Payroll Assoc. ▼ Tests/Examination	ons	<u>C</u> Rating	ustomize View All Score		

Rate Applicant page (2 of 2)

Use this page to review the applicant's ratings for the those job opening qualifications that are included in a screening level.

Important! You cannot use this page to enter applicant ratings, only to review them and, importantly, to see if the ratings are missing. To enter applicant ratings, use the Application Details page, where you must add the content items that are used in screening.

	Click the Application icon to access the Application Details page, where you can enter the missing ratings.
Return to Previous Page	Click to return to the Screen Applicants - View Applicants page.
Previous Applicant and Next Applicant	Use these links to scroll through the data for all of the applicants who are listed on the Screen Applicants page.

Screening Levels

Use the links in the section title bar to scroll through the screening levels for the job opening.

This section contains grids for each content item that is included in the job opening template, regardless of whether the screening level includes any qualifications for that content item. For example, if the job opening template includes the Honors and Awards content item, then an Honors and Awards grid appears, regardless of whether you screen for honors and awards and regardless of whether the job opening even lists any honors or awards.

<Content Item>

The grid titles correspond to the name of each content type.

Item and Item Description	Describes the specific qualification being used by the screening process.
Application	Click to access the Application Details page, where you can add missing qualifications or ratings.
Rating	If the content type uses a rating scale, this column displays the applicant's rating. This field is empty for content types that do not have a rating scale.
Points	Displays the number of points awarded for a qualification. The point value for a qualification comes from the Job Opening Screening Criteria page, where you configured job-specific requirements for a screening level.
Required	Displays a selected check box if the qualification is marked required on the Job Opening Screening Criteria page. The check box is deselected if the qualification is not required.

Running Screening Levels and Applying Results

This section provides an overview of screening level processing and discusses how to:

- Review screening levels.
- Review and edit screening criteria.
- Run screening levels.
- Review and apply screening results.
- Review score details for a screening level.
- Review questionnaire details.
- Apply results.

Understanding Screening Level Processing

This overview discusses how you run screening levels and apply the results.

Reviewing and Editing Screening Level Criteria

The applicant screening pages provide access to a detail page where you can review the criteria and processing rules for each screening level. You can also modify screening criteria on this page.

Running Screening Levels

You can run screening levels using the Screen Applicants, Screening Levels, and Screening Results pages. Make sure to run screening levels in the proper order (the order in which they appear on the Screen Applicants page).

Note. You cannot run screening levels for prescreening or online screening. These run automatically when applicants apply online using PeopleSoft Candidate Gateway. If the job opening has these screening levels, the system has already run these levels and applied the results for any applicant who applied online. (These levels are not relevant to applicants who apply using other methods.)

If the general screening settings for the job opening indicate that applicants must pass the previous level (this setting is in the Applicant Screening group box on the Job Opening page), the system filters out applicants who have not passed the previous screening level before performing any actual screening. The system also filters out applicants based on their dispositions. Specifically, the system process only applicants whose dispositions are configured as open statuses associated with either the *1-Review* phase, the *2-Applied* phase, or no phase at all. This prevents applicants in the later phases of the recruiting process (*3-Screen, 4–Route, 5-Interview, 6-Offer, 7-Hire, or 8-Reject*) from being processed.

See Chapter 4, "Setting Up Recruiting Statuses," Defining Statuses and Reasons Codes, page 50.

When you run a screening level, the RS-Job Opening Screening (HRS_JO_SCR) Application Engine process uses the settings on the Job Opening Screening Criteria page as it performs the following tasks for each included applicant:

- 1. Evaluates whether the applicant has the attributes that you have selected as screening criteria.
- 2. Awards the specified number of points for each screening criterion that the applicant meets.

In U.S. federal implementations, the system keeps track of which attributes are marked as Augment or Selective so that the point subtotals for those types of criteria are available to use during the ranking process.

3. Adds the points earned for individual items to produce a cumulative point total.

This value represents the applicant's *raw points* for the screening level.

4. Evaluates whether the applicant passes or fails the screening level.

Applicant can fail a screening level if they have not earned enough points or if they do not meet criteria that was designated as required.

Screening levels can be configured to allow users to manually override the pass/fail status that the system assigns.

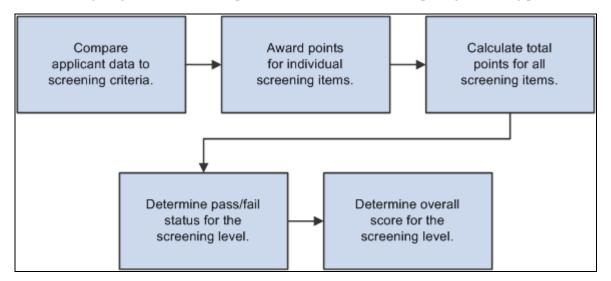
5. Assigns the applicant a final overall score for the screening levels.

Depending on the screening rules, the overall score might be the same as the raw points.

U.S. federal screening processes, however, use other scoring methods such as fixed scores for passing or failing or transmutation to a predetermined maximum based on the proportion of points earned to total available points.

See Chapter 13, "Creating Job Openings," Defining Screening Level Rules and Criteria, page 298.

The following diagram illustrates the process flow for the RS - Job Opening Screening process:



Screening level processing

Reviewing and Applying Screening Results

After the screening levels have been run, review the results on the Screening Results page. If you are satisfied, you can apply those results by clicking Apply Results button.

When you apply results, the system performs these actions:

• Updates the applicants' dispositions according to the settings in the screening level definition.

There are separate settings for applicants who pass and who fail the screening level.

• Creates rejection letters for applicants who fail the screening level.

This occurs if the screening level criteria identifies a letter to send. Depending on the screening level settings, the letter is either sent as an email attachment or added to the queue for the HRS Letter Generation (HRSLETTER) Application Engine process.

See Chapter 22, "Managing Applicants," Generating Batch Recruitment Letters, page 647.

• Updates the applicant data to show that the screening results have been applied.

Results are applied for every applicant who has screening results. If an applicant has results for multiple screening levels, the system uses the disposition settings and rejection letter settings from the last screening level.

Once results are applied for an applicant, that applicant is excluded from any subsequent runs of the screening level process. Therefore, after you apply results, the only reason to run additional screening levels is if new applicants have been linked to the job opening.

Note. Even after results are applied, you can continue to screen applicants who are subsequently added to the job opening.

Pages Used to Run and Apply Screening Levels

Page Name	Definition Name	Navigation	Usage
Screening Levels	HRS_JO_SCR_LVL	Recruiting, Find Job Openings, Find Job Openings	View screening levels associated with the job opening.
		Click the job opening link in the Search Results group box on the Find Job Openings page.	
		Click the Screen Applicants link on the Job Opening page: Manage Applicants tab.	
		Click the View Screening Levels link on the Screen Applicants page.	
Screening Criteria	HRS_JO_SCR_DTL	Click a Screen Level Name link on the Screening Levels page.	Edit the screening criteria.
Screening Results	HRS_JO_SCR_RSLT	Click the View Screening Results link on the Screen Applicants page.	Review the results of the screening process. You can access this page only after running a screening level.
Screening Details	HRS_APP_SCR_RSLT	Click the value in the Score column on the Screening Results page.	Review how many total points the applicant earned in the screening level and how many points were awarded for each type of screening criteria.
Questionnaire Results page	HRS_VIEW_QSTN_RSLT	Click the View Questionnaire Results link on the Screening Details page.	Review the applicant's answers to the online questionnaire that was completed during the online application process.

Reviewing Screening Levels

Access the Screening Levels page (click the View Screening Levels link on the Screen Applicants page).

Job Opening				
Screening Le	evels			
			Print Job Oper	ning
Posting Title:	Web Developer		ob Opening ID:	10041
Job Opening Status: Position Number:	010 Open 19143002 Web		ob Type:	Standard
Business Unit:	NSWBU Swiss	-		
Job Family:		10000		
Esave Retu	ırn to Job Opening			
View All Applicants	View Screening Levels	<u>View Screening Result</u>	2	
Run: Select	GOR	ank Applicants	Process M	onitor 🗘
Job Opening / Jobs		Ē	ind View All Firs	t 🕻 1 of 1 🗋 Last
Job Opening ID:	10041 Web	Developer		
Job Code:	N00037 004	- Web Developer		
Screening Levels				
Screen Level Name	Last Run Date	Submitted By	Results Appli	ied
Preliminary	08/29/09 12:48PM	Betty Locherty	No	
Final				
Run: Select	Go	Rank Applicants		
Select All	Deselect All	Route Applicant	Merge Appli	cant

Screening Levels page

Job Opening / Jobs

This group box displays information about the job opening. If there are multiple jobs associated with the job opening, you can scroll to see each one.

Screening Levels	
Screen Level Name	Identifies the screening level. Click the link to access the Screening Criteria page, where you can review and update the screening configuration.
	Note. If the screening level is for prescreening or online screening, and if any applicants have already applied, the name is no longer a link because you can no longer modify the criteria from the screening pages.
Last Run Date and Submitted By	These fields display information about the last time the screening level was processed.
Results Applied	For screening levels that have run at least once, this field displays <i>Yes</i> or <i>No</i> to indicate whether the screening results have been applied. The field is blank for screening levels that you have not yet run.

Reviewing and Editing Screening Criteria

Access the Screening Criteria page (click a Screen Level Name link on the Screening Levels page).

Screening Levels				
Screening Crite	eria			
		🛃 Print Job Open	ing	
Posting Title:	Admin Assistant	Job Opening ID:	30040	
Job Opening Status:	010 Open	Job Type:	Standard	
Position Number: Business Unit:	LEP00032 Administrative Assistant LEBU Federal Planning & Analysis			
Job Family:	LEBU Federal Planning & Analysis			
Screening Option Desc	ription			
	Ranking 1003			
Pass Status: Accepte				
Pass Reason:	•			
Fail Status: Reject	•			
Fail Reason:	•			
Letter:	•			
Seno	d Letter as Email When Results Are Applied			
Scoring Definition				
Assign Points				
Percent Needed to Pa	ass: 🗌 Use Raw Poin	its		
Maximum Points to A	ssign: 100			
Points Assigned for P	Pass: 0 Points Assigned for	or Fail: 0		
Manually Assign S	Status			

Screening Criteria page (1 of 2)

Screening Requirem	ents			Find			Customize	Find 🗖 🕌
Description	Item	Description	Edit Details	use in Screening	Required	Augment	Selective	Points
General Requirement	Regular / Temp : Regular							0
General Requirement	Full / Part Time : Full- Time							0
General Requirement	Standard Hours : 40							0
General Requirement	Shift : N							0
General Requirement	Travel Percent : <= 25%							0
General Requirement	Minimum Salary : 41233 - Year							0
General Requirement	Minimum Age : 18							0
General Requirement	Citizenship Status : 1							0
General Requirement	Minimum Grade : 07							0
Education & Experience	Education: HS Graduate or Equivalency, 0							0
Screening Question	Question: Overtime		<u>Edit</u> Details					
Competencies	Ability to prioritize tasks	Approved/Official - Proficiency	<u>Edit</u> Details					
Language Skills	English	Language						5
Tests/Examinations	General Clerical Skills	Test						5
				Total Scre	eening Point	s:	15	
OK Cancel	Apply							

Screening Criteria page (2 of 2)

This page is the same as the Job Opening Screening Criteria page where the screening level was originally configured.

You can also modify screening criteria on this page. However, to add additional qualifications to the screening criteria, you must first go to the Job Opening page and add the qualification to the job opening itself.

See Chapter 13, "Creating Job Openings," Defining Screening Level Rules and Criteria, page 298.

Running Screening Levels

To run a screening level:

- 1. Access the Screen Applicants page, the Screening Levels page, or the Screening Results page.
 - a. Select Recruiting, Find Job Openings, Find Job Openings.
 - b. Click the job opening link in the Search Results group box on the Find Job Openings page.
 - c. Click the Screen Applicants link on the Job Opening page.
 - d. Optionally click the links to move to the Screening Levels page or the Screening Results page.
- 2. Select the screening level in the Run field
- 3. Click the Go button.

See Viewing Applicants Linked to Job Openings

Reviewing and Applying Screening Results

Access the Screening Results page (click the View Screening Results link on the Screen Applicants page).

Job Opening			
Screening Res	sults		
		<i>a</i> Print Job Ope	ning
Posting Title:	Data Entry Clerk (Federal Operations - Salaried Transmutation)	Job Opening ID:	603314
Job Opening Status:	010 Open	Job Type:	Standard
Position Number:	19000022 Data Entry Clerk		
Business Unit:	GBIBU Global Business Institute BU		
Job Family:			
Bave Return to	o Job Opening		
View All Applicants V	iew Screening Levels View Screening Results		
Run: Select	Go Rank Applicants	Process Monitor	þ

Screening Results page (1 of 2)

Screening Results Find View All First K 1 of 1 Last									
Job Opening ID: 603314 Data Entry Clerk (Federal Operations - Salaried Transmutation)									
Job Code: 290030 003 - Clerk-Data Entry									
Screening Levels Find View All First I of 2 Last									
Scre	ening Le	evel: M	inimum Qualificati	ons	Apply Re	sults			
Арр	licants						<u>Cust</u>	omize Find 🗖	🐮 First 🚺 1-5 of 5 본 Last
Res	sult A	pplicant Da	ata 💷						
	Score	Points	Name	ID	Disposition	Screening Result	Rate	Results Applied	Competitive Status
	<u>91%</u>	70.0	Terry Shadbolt	4	030 Screen	Passed	<u>Rate</u>	No	Competitive
	<u>55%</u>	70.0	<u>Jim Furlong</u>	17	030 Screen	Passed	<u>Rate</u>	No	Competitive
	<u>36%</u>	0.0	<u>Celia Cruise</u>	94	110 Reject	Failed	Rate	No	
	<u>18%</u>	0.0	Juan Gonzalez	297	110 Reject	Failed	Rate	No	
	<u>36%</u>	0.0	Rashada Moore	299	110 Reject	Failed	Rate	No	
Competitive Status: Mark Go									
Run: Select Go Rank Applicants Apply Results									
	ect All		Deselect All		Route Applican		lerge Ap		

Screening Results page (2 of 2)

Note. When multiple job codes are defined on the job opening, the Screening Results group box has multiple scroll levels, allowing each job code to be viewed after processing a given screening level. When a screening level is processed, it runs against all job codes that have screening criteria defined.

Run and GoSelect the screening definition you want to run, and click the Go button to
run it.(USF) Rank ApplicantsClick to access the Rank Applicants page.

Screening Levels

Use this group box to view information and results for each screening level. Prescreening and online screening levels do not appear here.

Screening Level Click the screening level name link to access the Screening Criteria page, where you can review and optionally update the screening level configuration.

Apply Results	Click to apply the most recent screening results. When you apply results, the system updates the applicants' dispositions according to the settings in the screening level definition.
	If you apply results after running multiple screening levels, the system updates the applicants' dispositions based on the results of the last screening level.
	If there are multiple job codes associated with the job opening, the system updates the applicants' dispositions using the most advantageous disposition available.

Applicants: Result Tab

This grid displays the screening results for each applicant linked to the job opening.

Score	Displays the percent of the maximum possible score that the applicant earned. Click the link to access the Screening Details page, where you can see how many points the applicant earned for various types of screening criteria.
Points	Displays the overall screening points that the applicant earned for the screening level. Depending on the screening level configuration, this could be the raw points that the applicant earned, or it could be a fixed number that is associated with a pass or fail status.
Disposition	Displays the applicant's current disposition for the job opening. When you apply screening results, the system updates this disposition.
Screening Result	Indicates whether the applicant passed or failed the screening level.
	If Manually Assign Status is selected on the Screening Criteria page, then you can change the status. Otherwise, this field is read-only.
Rate	Click this link to access the Rate Applicant page, where you can review applicant ratings for rated content types. The Rate Applicant page provides links to the Application Details page so that you can add any missing ratings.
Results Applied	Displays <i>Yes</i> or <i>No</i> to indicate whether you have applied results. After you apply results, you cannot reprocess the same applicants.

Applicants - Applicant Data Tab

Access the Applicant Data tab.

Applicants	Custo	omize Find 🗖 🛗 First 🗹 1-5 of 5 🖸 Last
Result Applicant Data	•	
Name	Date	Туре
Jan Bradley	06/22/2009	External Applicant
Terry Shadbolt	06/22/2009	External Applicant
Rosanne Stocker	06/22/2009	External Applicant
Jim Furlong	06/22/2009	External Applicant
Theresa Kelsey	06/22/2009	External Applicant
	Competitive Stat	tus: Mark 🔽 Go

Screening Results page: Applicant Data tab

This grid displays additional information about the applicants for whom screening results exist, including the date the applicant was last screened.

Page Elements for Performing Applicant Actions

On the Result tab in the Applicants grid, the first column is a check box that you select to choose applicants to be included when you use these page elements.

Competitive Status and Go	Use these fields to assign each applicant a competitive status. Select one or more applicants, choose the status to apply, then click the Go button.		
	The available statuses are <i>Competitive, Non-Competitive Other</i> , or <i>Noncompetitive VRA</i> (noncompetitive veterans recruitment appointment).		
Route Applicant	Click this link to route the selected applicants.		
	See <u>Chapter 17, "Screening and Routing Applicants," Routing Applicants,</u> page 473.		
Merge Applicant	Click this link to access the Review Duplicate Applicants page, where the selected applicants appear as a set of duplicates for you to review and optionally merge.		
	See <u>Chapter 22</u> , "Managing Applicants," Identifying and Merging Duplicate Applicant Records, page 674.		

Note. When you run a screening level, the system does not limit screening to selected applicants.

Reviewing Score Details for a Screening Level

Access the Screening Details page (click the value in the Score column on the Screening Results page).

Screen Applicants							
Screening Details							
Terry Shadbolt							
Applicant ID:	4						
Return to Previous Page							
Job/Job Opening Summa	ary	<u>Find</u> View All First	1 of 1 🖸 Las				
Job Opening ID:	603314	Data Entry Clerk (Federal Operations - S Transmutation)	alaried				
Job Code:	290030	003 - Clerk-Data Entry					
Screening Level Summa	агу	<u>Find</u> View All First	1 of 1 🕨 Last				
Screening Level:	Minimum Qualifica	ations					
Screening Points:	50.0	Level Score: 70.0					
Screening Status:	Passed	Status Date: 08/29/2009					
Status Reason:			<u>رع</u>				
Level Points Detail							
General Requirements:	30	Augmentation Points:	0.0				
Education/Experience:	10	Selective Factor Points:	0.0				
JPM Content Score:	10	Veterans Preference Points:	0				
Screening Questions:	0						
L							
Return to Previous Page							

Screening Details page

This page provides the summary information about the points that an applicant earned for a specific screening level.

Screening Level Summary

This section has one row of data for each screening level that you've run for the applicant.

Screening Level	Identifies the screening level whose results you are examining. Scroll to see results for other screening levels.
Screening Points	Displays the points that the applicant earned for meeting this screening level's criteria.

Level Score	Displays the applicants overall score for the screening level. For example, if a screening level awards 70 points for passing, this field displays 70.
Screening Status	Indicates whether the applicant Passed or Failed the screening level.
Status Date	Displays the most recent date that the applicant was screened with this screening level.
Status Reason	If the applicant failed the screening level, this field displays an explanation such as <i>Applicant failed minimum screening level percent requirement</i> .

Level Points Detail

This group box breaks down the sources of the applicant's raw points.

General Requirements	Displays the number of points that the applicant received for meeting General Information screening criteria.
Education/Experience	Displays the number of points that the applicant received for meeting Education & Experience screening criteria.
JPM Content Score (job profile management content score)	Displays the number of points that the system awarded to the applicant based on profile content type qualifications such as competencies, languages, and degrees.
Screening Questions	Display the number of points that the system awarded based on the applicant's responses to screening questions.
	Note. The system does not award any points for unanswered questions or for open-ended questions that have been answered but not yet evaluated. Click the View Questionnaire Results link to ascertain whether either of these conditions is true and whether you need to send reminders to applicants or evaluators.
View Questionnaire Results	Click to access the Questionnaire Results page, where you can view the applicant's responses to screening questions.

(USF) Additional Federal Screening Data

These fields in the Level Points Detail group box appear only in federal systems.

(USF) Augmentation Points Displays the number of points that the applicant received for screening items that were marked as Augment on the Job Opening Screening Criteria page.

These are included in the total point for the screening level.

(USF) Selective Factor Points	Displays the number of points that the applicant received for screening items that were marked as Selective on the Job Opening Screening Criteria page.
	These are included in the total point for the screening level.
(USF) Veterans Preference Points	Displays the number of veterans preference points that the system awards based on the applicant's veterans preference code.
	These points are not associated with any particular screening level, so although they are displayed in the summary for each screening level, they are <i>not</i> included in the total points for the screening level. They are added to the applicant's cumulative screening score on the Rank Applicants page.

Reviewing Questionnaire Details

Access the Questionnaire Results page (click the View Questionnaire Results link on the Screening Details page).

Questionnaire Results Orla Dooley Applicant ID: 300159 Screening Level: Preliminary Return to Previous Page CORRECT Are you willing to work overtime periodically ? Screening Questions No Yes OPEN ENDED Please discuss in a short essay the protocols you would establish newly formed Burns Unit in a rural hospital. Screening Questions 1. Treatment protocols. 2. Privacy protocols.			cants	Screen Applica
Applicant ID: 300159 Screening Level: Preliminary Return to Previous Page CORRECT Are you willing to work overtime periodically ? Screening Questions No Yes OPEN ENDED Please discuss in a short essay the protocols you would establish newly formed Burns Unit in a rural hospital. Screening Questions 1. Treatment protocols. 2. Privacy protocols.			aire Results	Questionna
Screening Level: Preliminary Return to Previous Page Return to Previous Page CORRECT Are you willing to work overtime periodically ? Screening Questions No No Yes OPEN ENDED Please discuss in a short essay the protocols you would establish newly formed Burns Unit in a rural hospital. Screening Questions 1. Treatment protocols. 1. Treatment protocols. 2. Privacy protocols.				Orla Dooley
Return to Previous Page CORRECT Are you willing to work overtime periodically ? Screening Questions No No Yes OPEN ENDED Please discuss in a short essay the protocols you would establish newly formed Burns Unit in a rural hospital. Screening Questions I. Treatment protocols. 1. Treatment protocols. Please			300159	Applicant ID:
CORRECT Are you willing to work overtime periodically ? Screening Questions Image: Screening Question (Contemported and Contemported			: Preliminary	Screening Level:
Screening Questions Image: No Image: No Image: Version of the second sec			<u>Page</u>	Return to Previous Pa
No Yes OPEN ENDED Please discuss in a short essay the protocols you would establish newly formed Burns Unit in a rural hospital. Screening Questions 1. Treatment protocols. 2. Privacy protocols.			Are you willing to work overtime periodically ?	CORRECT
Image: Wester State Yes OPEN ENDED Please discuss in a short essay the protocols you would establish newly formed Burns Unit in a rural hospital. Screening Questions 1. Treatment protocols. 2. Privacy protocols. 2.			estions	Screening Quest
OPEN ENDED Please discuss in a short essay the protocols you would establish newly formed Burns Unit in a rural hospital. Screening Questions 1. Treatment protocols. 2. Privacy protocols.			No	
newly formed Burns Unit in a rural hospital. Screening Questions 1. Treatment protocols. 2. Privacy protocols.	2		Yes	
 Treatment protocols. Privacy protocols. 	in a	u would establish in a		OPEN ENDED
2. Privacy protocols.			estions	Screening Quest
 Additional administrative protocols. 			cols. cols	 Privacy protocol Hiring protocols
Subtotal	2	Subtotal:		

Questionnaire Results page

Review the questions that were included in screening.

For multiple-choice questions, the page shows which answer or answers the applicant chose and how many points those answers are worth.

For open-ended questions, the page shows the applicant's answer and how many points the applicant earned for that answer. If there are no points shown, then no evaluations have been submitted.

Applying Results

Access the Screening Results page (click the View Screening Results link on the Screen Applicants page).

See Chapter 17, "Screening and Routing Applicants," Reviewing and Applying Screening Results, page 457.

Once you have reviewed the screening results and are satisfied with them, you can click the Apply Results button to finalize the result and update applicant dispositions accordingly.

Note. Only applicants that have been screened can have results applied.

(USF) Ranking Applicants and Generating the Certificate of Eligibles

This section provides an overview of the federal ranking process and discusses how to:

- Assign competitive and noncompetitive statuses.
- Rank applicants.
- Review cumulative score details.
- Generate the Certificate of Eligibles.
- Print the Certificate of Eligibles.

Understanding The Federal Ranking Process

This overview describes the federal ranking process

Competitive/Noncompetitive Status

All applicants must have a competitive/noncompetitive status in order to be included in the final applicant ranking. Competitive/noncompetitive status is a person's basic eligibility for assignment to a position in the competitive service without having to compete with members of the general public in an open competitive examination.

The available statuses are *Competitive, Non-Competitive Other*, or *Noncompetitive VRA* (noncompetitive veterans recruitment appointment).

Assign statuses on the Screening Results page before you access the Rank Applicants page to begin the ranking process. The Rank Applicants page lists only applicants who have been assigned a status.

Applicant Classification

The Rank Applicants page displays a screening score for each applicant. The score is the sum of the applicant's scores for individual screening levels and any veterans preference points.

As you begin the ranking process, you determine the score thresholds that the system uses to classify candidates as qualified, well-qualified, or best-qualified.

The system then considers these qualification classifications along with the applicants's priority processing status and places applicants in these four categories:

- Category 1: Qualified, well qualified, and best qualified applicants with *Must Select* priority placement.
- Category 2: Well qualified and best qualified applicants with Must Consider priority placement.
- Category 3: Best qualified applicants with no priority placement.
- Category 4: Qualified and well qualified applicants with no priority placement.

The screening rules that you configure determine which categories of applicants are included in the final ranking.

There are separate rules for competitive applicants and noncompetitive applicants. So, for example, you might include all four categories for noncompetitive applicants, but only the first three categories of competitive applicants.

Tie-Breakers

If two or more applicants have the same score in the same category, you can apply one of three tie-breaker methods:

- Augmenting Factors, which uses criteria identified as Augmenting on the screening criteria.
- Name Request, which gives priority to applicants whose name are listed in the Candidate Name Request grid on the job opening.
- Random Number, which uses an algorithm based on the number that you entered in the Tie Breaker Number field in the Federal group box in the screening options section of the job opening.

Certificate of Eligibles

After you have ranked the applicants, you are ready to certify the best-qualified applicants for the position. The OPM regulates the definition of eligibles and the order in which they should appear on the certificate. Once you create the certificate, use the Certificate of Eligibles component to print it.

Pages Used to Rank Applicants and Generate the Certificate of Eligibles

Page Name	Definition Name	Navigation	Usage
Screening Results	HRS_JO_SCR_RSLT	Recruiting, Find Job Openings, Find Job Openings	Review the results of the screening process.
		Click the job opening link in the Search Results group box on the Find Job Openings page.	Note. You can access this page only after running a screening level.
		Click the Screen Applicants link on the Job Opening page: Manage Applicants tab.	
		Click the View Screening Results link on the Screen Applicants page.	
Rank Applicants	HRS_JO_RANK	Click the Rank Applicants button on the Screening Results page.	Rank applicants.
Rank Applicants (details)	HRS_APP_RNK_RSLT	Click the value in the Score column on the Rank Applicants page.	Review how many total points the applicant earned across all screening levels and through preference items, and review a breakdown of this number by screening level and by type of screening criteria.
Certificate of Eligibles	HRS_G_CRT_ELG	Recruiting, Administration, Certificate of Eligibles, Certificate of Eligibles	Set up a certificate of eligibles.
Certificate of Eligibles	HRS_RUN_HRS821	Recruiting, Reports, Certificate of Eligibles, Certificate of Eligibles	Print a certificate of eligibles.

Assigning Competitive and Noncompetitive Statuses

Access the Screening Results page (click the View Screening Results link on the Screen Applicants page).

See Chapter 17, "Screening and Routing Applicants," Reviewing and Applying Screening Results, page 457.

To assign competitive or noncompetitive statuses:

- 1. In the Competitive Status field, select the status to assign: *Competitive, Non-Competitive VRA,* (noncompetitive veterans recruitment appointment) or *Non-Competitive Other*
- 2. Click the check box in the rows for the applicants who are to be assigned the selected status.

3. Click the Go button next to the Competitive Status field.

The system assigns the statuses, which now appear in the Competitive Status column of the Applicants grid.

Ranking Applicants

Access the Rank Applicants page (click the Rank Applicants button on the Screen Applicants page).

Scree	Screen Applicants							
Ranl	Rank Applicants							
🚑 Print Job Opening								
Posting Title: Admin Assistant Job Opening ID:						ID: 30040		
-	ening S						Job Type:	Standard
	n Numb				ninistrative Assista			
Job Fai	ss Unit: milv:		LEBU	Feder	al Planning & Anal	ysis		
50514	iniy.							
S	ave	Cano	el R	eturn to P	revious Page			
Applic	ants						Find View	/All First 🚺 1 of 2 🕨 Last
Job Op	pening II	D: 30	040	Ad	min Assistant			
Job Co	ode:	LE	J006	GS	- 0318 - 07 - Admi	nistrative	Assistant	
Comp	oetitive				<u>Customiz</u>	<u>e Find</u> Vi	ew All 🗖 📘	First 🗹 1 of 1 🖸 Last
Rank	Score	Points	Category	Weight	Name	ID	Date	Qualifications Determination
	<u>97%</u>	56.0			Kerry O'Reilly	1042	02/15/2005	Eligible/Not Rated
Noncompetitive Customize Find View All 🔄 🛗 First 🚺 1 of 1 🖸 Last								
Rank	Score	Points	Category	Weight	Name	ID	Date	Qualifications Determination
	<u>86%</u>	50.0			Jose Campos	1022	02/15/2005	Eligible/Not Rated

Rank Applicants page (1 of 2)

Qualify Applicants		
Best Qualified Score:	Well Qualified Score:	Qualify Applicants
Create Certificates		
Applicants to Consider:	Certificate Number:	Create Certificates
Tie Breaker		
Tie Breaker Option:		 Apply Tie Breaker
Save Cancel	Return to Previous Page	

Rank Applicants page (2 of 2)

Competitive and Noncompetitive

These grids list the applicants from the job opening; applicants are segregated according to the competitive status that you manually assigned on the screening pages. The Noncompetitive grid includes applicants with either of the two noncompetitive statuses.

Rank	Initially this field is blank. When you qualify the applicants (by entering the thresholds for best qualified and well qualified and then clicking the Qualify Applicants button), the system assigns a ranking to the applicant. This field can be overridden.
Score	Displays the percent of the maximum points that the applicant attained. The maximum point value is manually entered on the screening section on the Job Opening page; there is no requirement for it to be the true maximum amount of points possible.
	Click the score to access a detail page that shows a breakdown of how the points were earned, both by screening level and by screening criteria type.
Points	Displays the total points that the applicant accumulated during the screening process, including veteran's preference points.

Category	Indicates which of four applicant categories the applicant belongs to. These categories are based on a combination of the applicant's priority placement status for the job opening and the applicant's qualification classification (best qualified, well qualified, or qualified).		
	See <u>Chapter 17, "Screening and Routing Applicants," Applicant</u> <u>Classification, page 465.</u>		
	This column is blank when you begin the ranking process. This is because the qualification classification is not set until you enter score thresholds and click the Qualify Applicant button. After you click the Qualify Applicant button, the system updates the Competitive and Noncompetitive grids with each applicant's qualification determination and category.		
Weight	Displays the weight factor from the applicant's priority placement code. The weight does not affect the score; it is used to prioritize which priority placement code to use when an applicant has more than one.		
Name and ID	These fields identify the applicant. Click the name link to access the Manage Applicant page.		
Date	Displays the date that the applicant was added to the list of competitive or noncompetitive applicants.		
Qualifications Determination	Displays the applicant's qualification level.		
	Before you click the Qualify Applicants button, the value is <i>Eligible/Not Rated</i> .		
	After you click the Qualify Applicants button, the value is <i>Qualified, Well Qualified,</i> or <i>Best Qualified,</i> depending on where the applicant's score falls with regards to the thresholds that you enter in the Best Qualified Score and Well Qualified Score fields.		

Qualify Applicants

Use this group box to set score thresholds for best qualified and well qualified applicants and to assign applicants a qualification status based on these thresholds.

Best Qualified Score	Enter the minimum score an applicant must achieve to be given a <i>Best Qualified</i> determination.
Well Qualified Score	Enter the minimum score an applicant must achieve to be given a <i>Well Qualified</i> determination.
Qualify Applicants	Click this button to assign qualification determinations to all applicants. Applicants with scores under the threshold for <i>Well Qualified</i> status are given the status <i>Qualified</i> .

Create Certificates

This group box is used to process the Certificate of Eligibles.

Applicants to Consider	Enter the number of applicants you want included in the certificate.
Certificate Number	Enter the number of the certificate.
Create Certificate	Click to process the certificate of eligibles.

Tie Breaker

If any of the applicants are tied, use this section to apply a tie breaker method.

Tie Breaker Option	Select one of these tie-breaker methods:
	• <i>Augment:</i> The winner of the tie is the applicant with more points earned for Augmenting criteria (criteria for which you selected the Augment check box on the Job Opening Screening Criteria page).
	• <i>Name Request:</i> Applicants listed on the Applicant Name Request page on the job opening win ties.
	• <i>Random Number:</i> The system breaks ties using an algorithm that uses a number that you enter in the Applicant Screening section of the Job Opening page. (Specifically, the number is in the Tie Break Number field in the Federal group box.)
Apply Tie Breaker	Click this button to update the applicant rankings based on the selected tie- breaker method. If there are still ties after you apply one tie-breaker method, you can select another method and apply it.

Reviewing Cumulative Score Details

Access the Rank Applicants (details) page (click the value in the Score column on the Rank Applicants page).

Screen Applica	ints				
Rank Applic	ants				
Terry Shadbolt					
Applicant ID: 4					
Return to Previous	Page				
Job/Job Opening S	Summary		Find View All First	Last	
Job Opening ID:	603314		Data Entry Clerk (Federal Operations - Sala Transmutation)	ried	
Job Code:	290030		003 - Clerk-Data Entry		
Screening Level Summary			Find View All First	🕻 1 of 3 🕨 <u>Last</u>	
			Grand Totals		
Screening Points): 	55.0	Level Score:	85.0	
Level Points Deta	il				
General Requirer	nents:	35	Augmentation Points:	0.0	
Education/Experi	ence:	15	Selective Factor Points:	0.0	
JPM Content Score:		15	Veterans Preference Points:	0	
Screening Questions:		0			
Return to Previous	Page				
Iteluin to Frevious	aye				

Rank Applicants (details) page

This page, like the Screening Details page, shows the sources of the points that were awarded to applicants during the screening process. But whereas the Screening Details page shows details for a single screening level, this page includes a scroll area that you can use to access information for all screening levels. The first record in the scroll level, displays grand totals across all screening level.

Generating the Certificate of Eligibles

Access the Rank Applicants page (click the Rank Applicants button on the Screen Applicants page).

Click the Create Certificates button.

See Chapter 17, "Screening and Routing Applicants," Ranking Applicants, page 467.

Working With the Certificate of Eligibles

Access the Certificate of Eligibles administration page (Recruiting, Administration, Certificate of Eligibles, Certificate of Eligibles).

Certificate of Eligibles						
Job Opening ID:500409Recruitment Type:Open ComStatus Code:010Certificate of Eligibles Detail	npetition	<u>Find</u> View	All First 🚺 1 of 1 D Last			
Job Code: 170005 -	- 004		🗖 Primary 🛛 🛨 💻			
Certificate of Eligibles Nbr: Certificate Status: Certificate Source:	1 Issued/Received Generated Internally	•				
Date of Request:	31	Date Received:	B			
Due Date:	07/19/2009	Date Returned:	3			
Date Sent to SO:	06/19/2009	Issue Date:	06/19/2009			
Date Returned from SO:	31	Extension Date:	31			

Certificate of Eligibles administration page

Printing the Certificate of Eligibles

Access the Certificate of Eligibles report page (Recruiting, Reports, Certificate of Eligibles, Certificate of Eligibles).

Certificate of Eligibles	
Run Control ID: qae	Report Manager Process Monitor Run
Certificate of Eligibles Detail	Find View All First 🚺 1 of 1 🗅 Last
*Certificate of Eligible Number:	+ -
Job Opening ID:	
Job Code:	

Certificate of Eligibles report page

Enter the certificate number, then run the report.

Routing Applicants

This section provides an overview of applicant routing and discusses how to:

- Route applicants.
- Enter a routing recommendation and a final routing decision.

Understanding Applicant Routing

After the screening process has helped you evaluate applicants, you are ready to decide what to do next each applicant. *Routing* refers to both the decision about what do next with the applicant and the act of sending other recruiting users a request to provide input on that decision.

Routing Decisions

The system uses statuses from the Route status area to describe the possible actions you can take for an applicant.

As delivered, the system includes these statuses for the Route status area:

- *Routed* indicates that the applicant has entered the routing phase and that you are seeking recommendations for further applicant processing.
- *Invite for Interview* indicates that you intend to proceed to the next step in the recruiting process by inviting the applicant to interview.
- *Hold* indicates that you do not intend to make a decision yet.
- *Reject* indicates that you are not interested in the applicant.
- *Withdrawn* indicates that the applicant is no longer available for the job opening.

The Route Applicant Action

Route Applicant is one of the predefined actions that Talent Acquisition Manager enables you to perform using the Take Action and Group Action fields that appear on several page.

When you initiate the *Route Applicant* action, the Route Applicant page appears. Use this page to list the people whose feedback you are requesting. When you submit the routing request, the system sends each recipient a notification with a link to the page where the recipient enters a response.

Routings have their own status, separate from the applicant's disposition. When you create a routing request, you also assign the initial routing status. As delivered, the default routing status is *Routed*, indicating that you have just begun the decision-making process.

See Chapter 22, "Managing Applicants," Actions in the Take Action Field, page 603.

Routing Recommendations and Final Decisions

The routing request page includes a Response field for each person to whom you are routing the applicant. This field is where the routing recipients select the routing status that they recommend. When creating a routing request, you leave this field blank for the routing recipient to complete.

The notification that the recipient receives includes a link to the Disposition Details - Route page, which displays the same recipient grid as the Route Applicant page. This is where the routing recipient enters a response.

The Disposition Details - Route page is also where a recruiter reviews the routing recommendations and updates the applicant's overall routing status when a final routing decision has been made.

When an applicant's overall routing status changes, rules for status change effects make related changes to the applicant's disposition.

Note. Only changes to the overall routing status trigger status change effects. The routing recommendations in the Response field do not have any effect on the applicant's disposition.

See Chapter 4, "Setting Up Recruiting Statuses," Delivered Status Change Effects, page 42.

Pages Used to Route Applicants

Page Name	Definition Name	Navigation	Usage
Route Applicant	HRS_GACT_APP_RTE	Recruiting, Find Applicants, Find Applicants Search for applicants, then in the Search Results grid, select <i>Route Applicant</i> in the Take Action field or the Group Action field. (This action is also available on other pages.)	Route an applicant to another employee to get a recommendation regarding the next step in the recruiting process.

Page Name	Definition Name	Navigation	Usage
Disposition Details - Route	HRS_APP_RCMNT	 On the Manage Applicant page: Applicant Activity tab: Current Status section, click the link in the disposition column when the disposition is <i>Route</i>. Users who receive a routing request email can click the link in the email. 	Users who receive routing requests use this page to enter a response to the request. Others users use this page to review routing information and enter a final routing determination.

Routing Applicants

Access the Route Applicant - Route Applicant page (on the Find Applicants page, select *Route Applicant* in the Take Action field or the Group Action field).

Route Applicant					
Route Applicant					
Applicants Being Rou	uted				
Applicant	Name	Name			
4	Terry Shadbolt				
112	Gary Gold				
Routing Details	·				
*Overall Routing Status: 010 Routed			Status D	ate:	31
Status Reason:					
Routings					
*Route Date *Rout	te To	Response Due	Response	Response Date	
06/11/2009 🛐 Jake	e Oglevy 🔍	06/18/200 🛐	•	31	+ -
Submit Can	ncel				

Route Applicant page

Applicants Being Routed

This grid lists the names and IDs of the applicants that you are routing.

Routing Details

Overall Routing Status	Select the initial value for the Route status area. As delivered, the default status in this area is <i>Routed</i> .
	See <u>Chapter 4, "Setting Up Recruiting Statuses," Understanding Recruiting</u> <u>Statuses, page 35.</u>
Status Date	Enter the date that the selected routing status is to be applied. The default value is the current date.
Status Reason	Optionally, select a reason for assigning the selected routing status. Values are available only if the definition of the selected status includes associated reasons.

Routings

Use this grid to identify the people whose feedback you are requesting.

Route Date	The system enters the current date.
Route To	Enter the name of the person to whom you are routing the applicant.
Response Due	Enter a date by which the recipient should respond with a recommendation regarding the applicant.
Response and Response Date	When routing applicants, leave this field blank. The person who receives the routing completes these fields to enter a routing recommendation, but does so on the Disposition Details - Route page rather than here.
Action Buttons	
Submit	Click to complete the routing action. The system sends a notification (HRS_APP_RTE) to each person listed in the Routings grid.
Cancel	Click to cancel the routing action and return to the previous page.

Entering Routing Recommendations and a Final Routing Decision

Access the Disposition Details - Route page (on the Manage Applicant page: Applicant Activity tab: Current Status section, click the link in the disposition column when the disposition is *Route*.)

Note. Users who receive a routing request can access this page using the link in the email.

Manage Applicant: Cindy Lee							
Disposition Details: Route							
A	C 1 1						
Applicant Name:	Cindy Lee			Date Ente	erea:	09/28/2004	
ID:	1016			_			
				🛃 <u>Print J</u>		ning	
Posting Title:	Senior Finan	cial Analyst		Job Opening ID: 30018			
Job Opening Status				Job Type: Standard			
Job Title:	Analyst-Finar			Job Code:		140040	
Position Number:		Financial Analy					
Business Unit:		bal Business In:	stitute BU				
Job Family:	KFIN Fir	lance					
Save <u>Re</u> Routing Details	turn to Previous Pa	<u>iqe</u>					
Routing Details							
Overall Routing Sta	atus: 010	Routed	•	Status	Date:	09/28/200	4 31
Status Reason:	Status Reason:						
Activity Routing Inf	formation						
*Route Date **Ro	oute To	Response Due	Respons	se l	Respons	se Date	
09/28/200 🛐 Jea	in Parsons	10/15/200	Invite	•	09/28/2	• •	
 Disposition Histo 	ry						
Disposition	Status	Reason	Status Date	e	Offer	r ID	
<u>Route</u>			09/28/2004	4			
Edit Disposition D	etails						
Save Ret	urn to Previous Pa	qe					

Disposition Details - Route page

Routing Details

This group box is identical to the Routing Details section of the Route Applicant page.

Overall Routing Status	Update the overall routing status when you decide what step to take next for
	this applicant.

Response and Response Date	The routing recipient named in the Route To field enters a recommended overall routing status and the date of the recommendation. The current date is the default response date.
	The system does not restrict access to these fields, so any user with the ability to update this page can enter a response on behalf of any routing recipient.
•	Use the Add and Delete buttons to change the list of routing recipients. The system does <i>not</i> notify recruiters that you add to the list using these buttons. To ensure that the routing recipients receive the notification, you need to use the <i>Route Applicant</i> action to create an additional routing.

Disposition History

This grid displays a row for each time the applicant has been routed. The data in the grid matches the data from the routing details for the routing. The text in the Disposition column is a link that you click to see the routing details associated with a specific routing action.

See Also

Chapter 22, "Managing Applicants," Reviewing Disposition Details, page 615

Chapter 18

Interviewing Applicants

This chapter describes how to:

- Maintain interview facilities.
- Schedule interviews.
- Complete interview evaluations.
- Finalizing interviews and sending evaluation reminders.
- Make final recommendations.
- Review interview schedules and evaluations.

Maintaining Interview Facilities

Interview facilities are specific locations such as meeting rooms where interviews take place. In the context of an applicant's interview schedule, the facility is referred to as the *venue*. If integration with Microsoft Outlook calendaring is active, the interview facility corresponds to a Microsoft Outlook resource.

Page Used to Maintain Interview Facilities

Page Name	Definition Name	Navigation	Usage
Interview Facilities	HRS_VENUE_PG	Recruiting, Administration, Interview Facilities, Interview Facilities	Maintain information about interview venues.

Maintaining Interview Facilities

Access the Interview Facilities page (Recruiting, Administration, Interview Facilities, Interview Facilities).

niel view Fac	cilities				
Venue Information					
Venue ID:	1				
Status:	Active				
Description:	Conference	e Room 1			
Email:	confroom1	@system.com			
Location:	Room 1, Ground Floor, Global Business Centre,				
Directions:	Proceed to Marttway Undergound Station. When leaving the station take the Sydway Boulevard exit and turn right. Walk 3 blocks to Global Business Centre on the same side of the road as the station exit.				
Notes:	Room is unavailable on Public Holidays and Weekends (Security)				
NOTES:	Round table with seating for 6; white board and coffee / tea bar				
Room Details:	Round tabl	e with seating for 6; white	e board and coffee / tea	a bar	
	Round tabl	e with seating for 6; white	e board and coffee / tea	abar	
	Round tabl		Eind View All 🔄 🕌		
Room Details:	Round tabl				

Interview Facilities page

Venue Information

Venue ID	Displays a unique identifier that the system assigns when you create the venue.
Status	Select <i>Active</i> or <i>Inactive</i> to indicate whether the venue is available for use on the Interview Schedule page.
Description	Enter the description that users see when selecting this venue to use for an interview.
Email	Enter the email address that is assigned to the Microsoft Outlook resource that corresponds to this venue. If you use full calendar integration, the system uses this email address to identify the venue, confirm its availability, and reserve it for the interview meeting. If you use partial calendar integration or no calendar integration, the email address is informational only.

Location	Enter the specific location of the venue. When a recruiter adds a venue to an interview, the system copies the location information to the interview schedule. If the recruiter modifies the location text in the actual interview schedule, the changes are replicated to the venue definition.
	Interviewers can see the location information on the Interview Calendar page.
	Applicants can see the location information on the Interview Detail page in Candidate Gateway. Applicants access this page using the interview notification link that the system generates if the Notify Applicant check box is selected when the interview is submitted.
	Under partial calendar information, location information is also included in the iCalendar attachment that the system sends.
Directions	Enter directions to the venue.
	Applicants can see the directions on the Interview Detail page in Candidate Gateway. Applicants access this page using the interview notification link that the system generates if the Notify Applicant check box is selected when the interview is submitted.
Notes and Room Details	Enter any additional useful information about the venue. Information in these fields does not appear on the Interview Schedule page. However, users can access the Interview Facility page from the Interview Schedule page if they want to review this information.

Attachments

Upload any useful attachments such as maps or room-specific instructions. The attachments grid includes a link to the document along with information about who uploaded the file and when it was uploaded.

Attachments do not appear on the Interview Schedule page. However, users can access the Interview Facility page from the Interview Schedule page if they want to review this information.

Scheduling Interviews

This section provides overviews of applicant interviews, calendar integration options, and interview letters and notifications. This section then discusses how to:

- Schedule applicant interviews.
- Check participant availability.
- Modify interview notification text
- Set notification options for interview changes.
- Modify interview notification text.
- Review and print an interview summary.

Understanding Applicant Interviews

Use the Interview Schedule page to schedule interviews at any time in the recruiting process, whether or not the applicant is associated with a job opening. The Interview Schedule page always shows data for a single job opening (or for no job opening, if applicants have applied without selecting a job opening).

Navigation and the Manage Interviews Action

To access the Interview Schedule page, use the Manage Interviews action.

See Chapter 22, "Managing Applicants," Actions in the Take Action Field, page 603.

The Manage Interviews action is available in these locations:

• Find Applicants page: Search Results grid (individual action or group action).

To schedule interviews using a group action, all selected rows in the search results must be for the same job or must all have no job opening selected.

• Manage Applicant page: Applicant Activity grid (individual action).

This grid shows the jobs that an applicant is linked to, so performing the action brings you to the Interview Schedule page for a single applicant and a single job opening.

• Job Opening page: Manage Applicants grid (individual action or group action).

You can also access the Interview Schedule page these ways:

- On the Disposition Details Interview page, click the Manage Interviews link.
- On the Job Opening page, click the Interview Schedule link under the Manage Applicants tab.
- On the Manage Applicant page, access interview summary information by clicking the Interview Schedule/Evaluation link under the Applicant Activity tab, then click the Manage Interviews link or click the date of an already-scheduled interview.

When you click the Manage Interviews link, the system prompts you to select the job opening for which you are scheduling an interview.

Page Layout for Multiple Interviews and Multiple Applicants

The Interview Schedule page always shows interviews for a single job opening, but depending on how you access the Interview Schedule page, it can show schedules for one applicant or multiple applicants. The page includes a collapsible section for each included applicant, even if there is only one.

Within the section for a single applicant, there are collapsible sections for each scheduled interview. In this context, a single interview refers to a single block of time that is associated with one or more interviewers. To schedule separate time slots for different interviewers, recruiters need to set up multiple interviews.

For each applicant whose schedule appears on the page, the final collapsible section, after all of the interview sections, is for sending the applicant a consolidated interview letter. This is a letter that provides information about multiple interviews. (The individual interview sections have separate page elements that you can use to mark them for inclusion in the consolidated letter or to generate a letter with information about just that one interview.)

See Chapter 18, "Interviewing Applicants," Interview Letters and Notifications, page 485.

Links at the bottom of the page enable you to expand or collapse all sections with a single click.

This diagram illustrates the data hierarchy on the Interview Schedule page, where one job opening can have one or more applicants, and each applicant can have one or more interviews.

Interview Schedule page (one job opening)	
Applicant #1	ן
Interview #1 - One time block - One or many interviewers	
Interview #2	
Consolidated Interview Letter	
Applicant #2	
Interview #1	
Interview #2	
Consolidated Interview Letter	

Interview Schedule page layout

Interview Information

When you schedule an interview, you provide the following information:

- General interview information such as the status and the interview type.
- The date a and time of the interview.
- A list of interviewers.
- Location information, including both an overall location (such as a particular office building) and specific venues (such as conference rooms) in that location.

Understanding Calendar Integration Options

This section provides an overview of calendar integration for interviews.

Integration Setup

To activate calendar integration for interviews in Talent Acquisition Manager, use the Recruiting Installation – General page, where you select the level of calendar integration for your system:

• *Full* integration uses PeopleSoft Desktop Integration functionality to integrate with Microsoft Outlook 2007.

PeopleSoft Desktop Integration provides integration between Talent Acquisition Manager and Microsoft Office. The integration enables you to pass interview data to Microsoft Outlook and receive updated information when changes are made in Microsoft Outlook. Oracle delivers the framework for this integration as part of the PeopleSoft Enterprise Components that are bundled with every PeopleSoft application.

A PeopleSoft plug-in for Microsoft Outlook (required for recruiters who schedule interviews) enables Microsoft Outlook to maintain a link between the invitation and the original Talent Acquisition Manager transaction.

• Partial integration sends interview schedules to applicants and interviewers as iCalendar attachments.

An email with an iCalendar attachment is sent only when the user explicitly chooses to send a notification. The email with the attachment is sent in addition to a standard text-only PeopleSoft email notification.

The iCalendar file contains only the information that is required for creating a meeting request in an external calendar. The participant can import the iCalendar meeting request and act on it. This is a one-way integration and TAM does not get any response back from the participant.

• *None* indicates that you do not want to integrate with external calendaring systems.

Users can still choose to send notifications to applicants and interviewers, but the notifications are standard text-only PeopleSoft notification.

See <u>Chapter 2</u>, "Defining Installation Options for Recruiting," Defining General Settings for Templates, Approvals, and Integrations, page 11.

Full Calendar Integration

When you enable full calendar integration with Microsoft Outlook, recruiters still create the interview schedule using the PeopleSoft system. When the recruiter submits the interview data, the system sends the information to Microsoft Outlook via the Desktop Integration queue. The recruiter or meeting organizer can then send the meeting invitation from Microsoft Outlook.

The Microsoft Outlook meeting owner is the user who originated the interview in the PeopleSoft system. The users who schedule interviews must have the PeopleSoft plug-in for Microsoft Outlook properly installed. People who receive the meeting invitations but do not schedule them do not need the plug-in; to them, the invitation is identical to a standard Microsoft Outlook meeting invitation.

Until the invitations are sent from Microsoft Outlook, users can still make updates to the interview schedule in Talent Acquisition Manager. But after the invitations are sent from Microsoft Outlook, changes to the interview date and time must originate in Microsoft Outlook, not in Talent Acquisition Manager, which makes the relevant fields read-only. A link on the Interview Schedule page enables recruiters to open the meeting in Microsoft Outlook; any changes or cancellations made there are sent back to the PeopleSoft system and reflected on the Interview Schedule page.

Although recruiters cannot modify the interview schedule in the PeopleSoft system after the invitations have been sent from Microsoft Outlook, they can cancel the interview from the Interview Schedule page. The cancellation is sent to Microsoft Outlook, which deletes the corresponding meeting invitation.

The information that the system sends to Microsoft Outlook includes email addresses (not names or aliases) for all participants, including interviewers, venues (which correspond to *resources* in Microsoft Outlook), and applicants. These participants must have valid email addresses in their personal data records.

Internal participants, including internal applicants, receive Microsoft Outlook invitations.

External applicants are not included in the original meeting invitation, but after all internal participants have accepted the invitation, the PeopleSoft system sends an email with an iCalendar attachment to the external applicant. The system also creates an applicant contact note for the email.

As Microsoft Outlook receives replies to the meeting invitation, it sends the information to the PeopleSoft system, which updates the Interview Schedule page to show the attendees' responses. When all participants have accepted the invitation, the Interview Status changes to *Confirmed*.

See PeopleSoft 9.1 PeopleBook: Integration Interfaces

Partial Calendar Integration

Under partial calendar integration, Notify check boxes for the applicant and the interviewers enable the user to send notifications to interview participants. If these check boxes are selected at the time an interview is submitted or cancelled, the system sends each recipient an email with a formatted iCalendar attachment. Recipients can open the iCalendar attachment in their calendaring software to add, modify, or remove the meeting request entry from their calendar.

Under partial calendar integration, the email with the iCalendar attachment is sent in addition to a standard text-only PeopleSoft email notification.

Interview Letters and Notifications

This section provides an overview of interview letters and notifications

Interview Letters

When you enter interview information, you can optionally generate template-based interview letters to send to the applicant.

Each collapsible interview section includes a group box to use for producing an interview-specific letter, or you can mark the interview for inclusion in a consolidated interview letter. A separate Consolidated Interview Setter collapsible section appears after the last interview in the applicant's schedule, and you use this section to produce the consolidated letter.

The same letter templates are available for selection for individual interview letters and the consolidated interview letter. The delivered templates are valid for both scenarios because the letters list interviews in a table format even there is only one interview.

When the system generates interview letters, it also creates a contact note for the applicant.

Letter Generation

Talent Acquisition Manager uses Oracle Business Intelligence Publisher (BI Publisher) to generate recruitment letters, including interview letters.

You can generate interview letters manually on the Interview Schedule page. If you do not generate letters manually, then when you submit the interview schedule, individual interview letters that you defined but did not generate are added to the next run of the HRS Letter Generation process (HRSLETTR). This process generates all queued letters in batch.

Only individual interview letters can be generated in batch. Consolidated interview letters must be generated manually on the Interview Schedule page. This behavior ensures that there are no changes to the list of interviews to be included between the time you mark interviews for inclusion and the time the letter is generated.

To generate a letter from the interview schedule, use these links, which appear both for individual interviews and for the consolidated interview letter:

Generate Letter

Click this link to generate an interview letter based on the selected template. The letter opens in a new browser window where you can review and optionally update it. If you make changes, save the modified letter to your local disk so that you can upload the revised version.

When you generate the letter, the system enters the current date in the Date Printed field and generates a contact note for the applicant.

Email Applicant

Click this link to access the Send Correspondence page. If you manually generated an interview letter using the Generate Letter link, then the Send Correspondence page includes the interview letter as a default attachment to the email. When you send the correspondence, the system generates a contact note for the applicant. The contact note includes any attachments that were in the email.

Upload Letter

Click this link to upload a letter file from a local disk. Typically, you are uploading a modified copy of the letter that you created by clicking the Generate Letter link.

When you upload a letter, the system creates a contact note for the applicant. The contact note includes the interview letter attachment.

These links become available for a new interview only after the user saves the interview. The links remain available even if the user makes changes to the interview, but the letter generation process uses the saved data, so users must remember to save changes to ensure that the letter includes the most current information.

Interview Notifications

Under partial calendar integration or no calendar integration, the Interview Schedule page includes Notify check boxes for the applicant and the interviewers. When a user submits, resubmits, or cancels an interview, the system sends notifications to participants whose Notify check box is selected. Any time the system sends a notification to an applicant, it also creates a contact note in the applicant's record.

Note. The system sends notifications only when the Notify check box is selected.

The following table summarizes the types of notifications that the selected interview participants receive under each integration option:

Notification Type	Full	Partial	None
Email with iCalendar Attachment	Not applicable	Yes	No
Text-only email notification	Not applicable	Yes	Yes
Candidate Gateway notification (applicant only)	Not applicable	Yes	Yes

Candidate Gateway notifications are links on the Careers Home page. The applicant can click the interview notification link to access more complete interview details.

If an applicant already has a Candidate Gateway notification for the interview, and a recruiting user makes a change and sends a new notification, the system does not create an additional Candidate Gateway notification. Instead, the detail page that is accessed from the notification shows the updated interview data. If the applicant deleted the previous Candidate Gateway interview notification, then the notification process creates a new one.

See *PeopleSoft Candidate Gateway 9.1 PeopleBook*, "Using Candidate Gateway," Using the Careers Home Page.

When a participant's appointment status changes, the system sends a notification to the user who created the interview.

Notification Templates

To provide appropriate notification text for different scenarios, the system uses different notification templates depending on the action that triggered the notification and depending on whether the interview is for an application that is associated with a job opening or for an application with no job opening.

The following table lists the notification templates that the system uses to send notifications to interviewers:

Recipient	User Action	Job Opening or None	Interviewer Notification
Interviewer	Submit or resubmit interview	Job opening	HRS_INTVW_SCHED_TE AM
Interviewer	Submit or resubmit interview	No job opening	HRS_INTVW_SCHED_TE AM_NOJO

Recipient	User Action	Job Opening or None	Interviewer Notification
Interviewer	Cancel interview	Job opening	HRS_INTVWSCHED_TE AM_CANCEL
Interviewer	Cancel interview	nterview No job opening HRS_I AM_N	
Applicant	Submit or resubmit interview	Job opening	HRS_INTVWSCHED_AP PL
Applicant	Submit or resubmit interview	No job opening	HRS_INTVWSCHED_AP PL_NOJO
Applicant	Cancel interview	Job opening	HRS_INTVW_APP_CAN CEL
Applicant	Cancel interview	No job opening	HRS_INTVW_CANCEL_ APP_NOJO

See Also

PeopleSoft Candidate Gateway 9.1 PeopleBook, "Using Candidate Gateway," Viewing Interview Schedules

Chapter 22, "Managing Applicants," Sending Correspondence and Recruitment Letters, page 635

Pages Used to Schedule Applicant Interviews

Page Name	ne Definition Name Navigation		Usage		
Select Job Opening for Interview	HRS_APP_ACTION	Recruiting, Find Applicants, Find Applicants Search for applicants, then click an applicant name to access the Manage Applicant page. On the Manage Applicant page, click the Interview Schedule/Evaluation link under the Applicant Activity tab, then click the Manage Interviews link.	Select the job opening for which you are scheduling an interview for an applicant.		

Page Name	Definition Name	Navigation	Usage
Interview Schedule	HRS_INT_SCHED	You can access the Interview Schedule page several ways. This list presents the most frequently used methods.	Schedule applicant interviews.
		 Select Manage Interviews in the Take Action field in the Search Results grid on the Find Applicants page, in the Applicant Activity grid on the Manage Applicant page, or in the Manage Applicant grid on the Job Opening page. Click the Continue button on the select Job Opening for Interview page. 	
Comments	HRS_RCRTR_CMTS_SP HRS_REC_APP_CMT_SP	Click the Comments icon on the Interview Schedule page. There are separate Comments icons for applicant-specific comments, for interviewer- specific comments, and for venue-specific comments.	Add a comment. Applicant comments are displayed on the interview detail page in Candidate Gateway. Interviewer comments are displayed to interviewers on the Interview Schedule page.
Interview Schedule - Applicant Availability Interview Schedule - Interviewer Availability Venue Availability	HRS_APP_AVAIL_SP HRS_INT_AVAIL_SP HRS_VEN_AVAIL_SP	On the Interview Schedule page, click the Availability icon for the applicant, for a specific interviewer, or for the venue.	View the current interview schedule for an applicant, interviewer, or venue. The system does not check external calendar systems for availability, even under full calendar integration. Availability is based only on other interview schedules in the PeopleSoft system.
Interview Note	HRS_INT_NOTE_PG	 Click the Add Note link on the Interview Schedule page. Click the View Notes link for an existing note on the Interview Schedule page. 	Maintain interview-related notes. This page functions similarly to the other note- related pages in the system.

Page Name	Definition Name	Navigation	Usage
Interview Request	HRS_INT_MTG_REQ_PG	Click the Interviewer Meeting Request or Applicant Meeting Request link on the Interview Schedule page.	Review and optionally modify notification text to be sent to interviewers and applicants.
Interview List	HRS_VW_ALL_INT_PG	Click the View/Print All Interviews link on the Interview Schedule page.	View a read-only summary of data from the Interview Schedule page, and print the information in this compact format.

Scheduling Applicant Interviews

Access the Interview Schedule page (select *Manage Interviews* from the Take Action field on the Find Applicants page, the Manage Applicant page, or the Manage Job Opening page).

Find Applicants						
Interview Sche	Interview Schedule					
interview schedule or up	erview schedules for the applicant(s) sele odate an existing schedule. Choose the D vers. Use the Add Interviewer hyperlink to a	elete icon to remov	e			
		🖨 Print Job Ope	ning			
Posting Title:	HRIS Specialist	Job Opening ID:	30017			
Job Opening Status:	010 Open	Job Type:	Standard			
Job Title:	Specialist-HRIS	Job Code:	820065			
Position Number:	19000012 HRIS Specialist					
Business Unit:	GBIBU Global Business Institute BU					
Job Family:	KHR Human Resources					
Submit Save for I	Later Cancel Return to Previous F	2aqe			_	
Applicant Name:	Bob Montana	Applican	nt ID:	1027		
Applicant Type:	External Applicant	Preferre	d Contact:	EMail		
Interview 1 - Date :	▶ Interview 1 - Date : 09/21/2004 From 10:00 AM To 11:00 AM					
▶ Interview 2 - Date : 09/28/2004 From 8:30 AM To 9:00 AM						
Consolidated Inter	view Letter					
Add Interview						

Interview Schedule page (1 of 5)

✓ Stewart Johannse	en							
Applicant Name:	Stewart Joh	annsen		Ар	plicant ID:	1031		
Applicant Type:	External Ap	plicant		Pr	eferred Cor	ntact: Not Spe	cified	
🗢 Interview 1 - Dat	te : 01/17/2012	From 10:00 AM 1	To 10:30 AM					
Interview Status: Interview Type:	Unconfirm	ed 🔽		Ini	tiator:	Betty Lo	cherty	
Applicant Appoint	ment Status:	None		Š		🗌 Notify A	oplicant	
Interview Details								
Date: 0	1/17/2012 関							
Time Zone:	PST 🔍	Start T	ime: 10:	MA00	End	Time: 10:30AM		
- Interview Sched	dule				Personali	<u>ze Find 🗖 🛗 🛛</u>	irst 🚺 1-2 of 2 🕨	Last
Details More								
Interviewer ID	Interviewer Name	Date	Start Time	End Time	Time Zone	Appointment Status	Notify	
KU0011 🔍 F	Patrick Seto	01/17/2012	10:00AM	10:30AM	PST	None 🔻		Î
KU0105 🔍 V	Vicky Adler	01/17/2012	10:00AM	10:30AM	PST	None 🔽		Î
+ Add Interviewe	<u>۲</u>					🗌 Notify In	terview Team	

Interview Schedule page (2 of 5)

Venue Information		Customize Find	View All 🗖	📕 First 🚺 1 of 1 D	Last
/enue	Email	Appointment Status	Comments	Availability	
Meeting Room 2a 🔍	meetroom2a@system.com	None 💌	,	Ő	Î
Add/Maintain Venue Informat	ion				
Location					
Level 42				<u> </u>	7
Wilsreck Building 5 Gotarph Street					
Abauladavilla				•	

Interview Schedule page (3 of 5)

Preview/Edit Meeting Request					
Interviewer Meetin		Applicant Mee	eting Request		
Letter					
Letter:	V	Dat	e Printed:		
Generate Letter Email Applicar	nt Upload Letter		Include in	Consolidated L	etter
Attachments					
Attachments			Personalize Fir	nd 🗖 🛗 Firs	t 🖪 1 of 1 🕨 Last
File Name	Description		Last Updated	Last Updated By	Delete
1 Interview Questions.pdf	Interview_Questions.pdf		01/13/2012 10:22PM	PS	Î
+ Add Attachment		+ Loa	id JO Attachm	ent	
Note					
Notes			Personalize Fir	nd 🗖 🛗 🛛 Firs	st 🗹 1 of 1 🕨 Last
Sequence ID Date Sul	bject		V	iew Notes	Delete
1 01/13/2012 Inte	erview Note		V	iew Notes	Î
Add Note Load JO Notes					
Cancel Interview					

- Consolidated Interview Letter		
Letter: HRS_INT_LETTER_IS1	Date Printed:	
Select All Interviews Deselect All Interviews	Exclude Past Dated Interviews	
Generate Letter Email Applicant Upload Letter Add Interview		
Submit Save for Later Cancel Return to Previous Page		
View/Print All Interviews Expand All Collapse All		

Interview Schedule page (5 of 5)

Page Elements That Vary According to the Integration Option

The following table lists the page elements that are hidden under certain integration settings:

Interview Schedule page (4 of 5)

Page Element	No Calendar Integration	Partial Calendar Integration	Full Calendar Integration
Interview Status field (Interview section)	Hidden	Visible	Visible
Scheduler Status field (Interview section)	Hidden	Hidden	Visible
Notify check boxes for the applicant, for individual interviewers, and for the interview team (Interview section)	Visible	Visible	Hidden
Preview/Edit Meeting Request group box (Interview section)	Hidden	Visible	Visible
Launch Scheduler link (Applicant section)	Hidden	Hidden	Visible

Note. The preceding page illustrations show the Interview Schedule page as it appears under partial calendar integration, where everything is visible except for the Scheduler Status field and the Launch Scheduler link. Those two page element are visible only under full calendar integration.

Page-Level Action Buttons

Print Job OpeningClick to access the Select Job Openings page, where you configure and
generate a printed version of the job opening data.

See <u>Chapter 21, "Managing Job Openings," Printing Job Openings, page</u> 595.

Submit	Click when you have finished entering the information for scheduling interviews. If you use the system's delivered statuses and status change effects, submitting an interview updates the applicant's disposition to <i>Interview</i> .
	Note. This update occurs because system assigns the interview its default status, <i>Interview</i> , which triggers the change to the applicant's disposition. The interview status in question is <i>not</i> the Interview Status field that is visible on the Interview Schedule page, which does not have configurable values. Instead, the status update process involves the Interview status area that you configure on the Statuses and Reasons page. This configurable status is used to make recommendations for interviewed applicants, and it is visible only on the Disposition Details: Interview page, where it is labeled Final Recommendation.
	If full calendar integration is active, submitting the interview schedule triggers the integration, and the system creates the Microsoft Outlook meeting. For partial or no calendar integration, submitting the interview generates notifications for the participants whose Notify check boxes are selected.
	See <u>Chapter 18, "Interviewing Applicants," Interview Letters and</u> Notifications, page 485.
Save for Later	Click to save your changes without generating notifications, updating the applicant's disposition, or creating calendar meetings.
	Note. Under full calendar integration, the interview is queued for Outlook only when submitted. Clicking the Save for Later button does not queue the interview.
Cancel and Return to Previous Page	Click either of these to return to the previous page without saving any changes.

<Applicant Name>

The system displays a collapsible section for each applicant for whom you are scheduling interviews. The applicant's name appears in the section heading.

Applicant Name, Applicant	These fields display identifying information about the applicant. The
ID, Applicant Type, and	applicant types are <i>Employee</i> , <i>External Applicant</i> , and <i>Non-Employee</i> .
Preferred Contact	

Interview-Level Page Elements

For each applicant included on the page, the system displays one or more collapsible sections representing separate interview times. The interview date and time appear in the section heading.

The header information for each interview includes these fields:

Interview Status	Note. This field appears only under full or partial calendar integration.
	Values in this status field represent the stages of the interview process.
	Users can always update the interview status manually. Additionally, under full calendar integration, certain situations cause the system to update the status automatically.
	These are the possible statuses:
	• Unconfirmed is the initial status for new and reinstated interviews.
	The Recruiter Alerts pagelet in PeopleSoft HCM Portal Pack includes an alert showing how many unconfirmed interviews the user is associated with.
	See <i>PeopleSoft HRMS Portal Pack 9.1 PeopleBook</i> , "Using HRMS Portal Pack Pagelets," Viewing Recruiter Alerts for Talent Acquisition Manager.
	• <i>Scheduled</i> indicates that the meeting invitation has been sent.
	Under full calendar integration, the system sets this status when the interview is scheduled in Microsoft Outlook.
	• <i>Confirmed</i> indicates that all participants have accepted the invitation.
	Under full calendar integration, the system sets this status after all the participants have accepted the Microsoft Outlook meeting. If a recruiter manually sets the status to <i>Confirmed</i> , the system checks if all participants have accepted the Microsoft Outlook invitation and displays a warning if any participants have not accepted the invitation.
	• <i>Completed</i> indicates that the interview has occurred and all interview evaluations are done.
	The Interview Evaluation Reminder (HRS_INT_EVAL) Application Engine process changes the interview status to <i>Completed</i> when it processes interviews after their scheduled date. Users can also manually put interviews in <i>Completed</i> status.
	See <u>Chapter 18, "Interviewing Applicants," Finalizing Interviews and</u> Sending Evaluation Reminders, page 516.
	• <i>Cancelled</i> indicates that the interview was cancelled; all interview data for a cancelled interview is read-only.
	Users can cancel interviews by updating the status directly (though the change does not take effect until the changes are submitted), or they can click the Cancel button that appears at the end of each interview section
	Note. This field is <i>not</i> associated with the Interview status area that is configured on the Statuses and Reasons page. The configurable statuses, which are not visible on this page, are used to make recommendations for

Scheduler Status	Note. This field appears only under full calendar integration.
	Displays the interview's status with regard to creating a Microsoft Outlook calendar invitation. The available statuses are:
	• <i>Initial - Not Visible:</i> This is the default status when you set up an interview. It indicates that the interview data has not yet been sent to PeopleSoft Desktop Integration for scheduling.
	• On Hold - Do Not Schedule: Select this status if you do not want the system to create a Microsoft Outlook meeting.
	• <i>Queued for Scheduling:</i> Select this status if you want the system to queue the submitted interview for scheduling in Outlook.
Interview Type	Select one of the interview types that your organization defined on the Interview Types page. The specific values depend on how your organization chooses to classify interviews.
	See <u>Chapter 8, "Setting Up Additional Recruiting Definitions," Creating</u> Interview Types, page 115.
Initiator	Displays the name of the user who originally created the interview.
Applicant Appointment Status	Under partial or no calendar integration, users can manually set the appointment status to <i>Accepted</i> , <i>Declined</i> , <i>None</i> (no response), or <i>Tentative</i> (tentatively accepted).
	Under full calendar integration, the system sets the appointment status based on the applicant's reply to the Microsoft Outlook meeting invitation. Because only internal applicants are included in Microsoft Outlook meeting invitations, recruiters must update this field manually for external applicants, who do not receive meeting invitations.
Applicant Comments	Click to access the Comments page where you can enter applicant-specific comments. These comments appear on the interview details that the applicant views in Candidate Gateway.
🛇 Applicant Availability	Click to access the Interview Schedule - Applicant Availability page, which displays all interview dates and times for the applicant.
	This page does <i>not</i> display information from the applicant's Microsoft Outlook calendar; it displays only interview data from the PeopleSoft system.

Notify Applicant	Note. This check box appears only under partial or no calendar integration.
	By default, this check box is initially deselected. Select this check box to have an email notification sent to the applicant when the interview is submitted. Under partial calendar integration, the system sends both a standard notification email and a separate email with an iCalendar attachment.
	If the applicant is a registered user of Candidate Gateway, the system also sends a Candidate Gateway notification.
	This check box does not appear under full calendar integration. Under full calendar integration, the system sends the application a notification email when the interview status changes to <i>Confirmed</i> .
Interview Details	
Date	Enter the date on which the interview is to take place.
Time Zone, Start Time and End Time	Enter the start and end times for the applicant's interview.
	This time applies to all interviewers. To schedule different interviewers at different times, create multiple interviews for the applicant. Under full calendar integration, each interview (including consecutive or overlapping interviews) becomes a separate Microsoft Outlook invitation.
	The default time zone is the recruiter's own time zone.

Interview Schedule

Use the Interview Schedule grid to schedule specific interviewers during the overall interview time block.

Interviewer ID and Interviewer Name	Identify interviewers by entering their employee IDs; the system then displays the interviewers' name.
Date, Start Time, End Time, and Time Zone	Displays the date and time for the interview in the interviewer's own time zone. Every interviewer is scheduled for the entire block of time. To schedule different times for different interviewers, create additional interviews.
Appointment Status (interviewer appointment status)	If you use full calendar integration, and if the initiator receives a Microsoft Outlook calendar response to the invitation, the system updates the interviewer's appointment status accordingly. Otherwise, manually set the appointment status to <i>Accepted</i> , <i>Declined</i> , <i>None</i> (no response), or <i>Tentative</i> (tentatively accepted).

Notify	Note. This check box appears only under partial or no calendar integration.
	Select this check box to have an email notification sent to an individual interviewer when the interview is submitted, resubmitted, or cancelled. The system uses the email addresses from the interviewers' Personal Data records (not the email addresses from their User ID security profiles).
Delete	Click the Delete icon to remove a particular interviewer from the interview schedule.
Comments (interviewer comments)	Access the More tab in the Interview Schedule grid to view the Comments icon.
	Click the icon to access the Comments page and enter interviewer-specific comments. If interviewer-specific comments exist, the interviewer sees a comments icon alongside the interview on the Interview Calendar page.
Availability (interviewer availability)	Access the More tab in the Interview Schedule grid to view the Availability icon.
	Click the icon to access the Interview Schedule - Interviewer Availability page, where you can view the interviewer's current interview schedule.
	This page does <i>not</i> display information from the interviewer's Microsoft Outlook calendar; it displays only interview data from the PeopleSoft system.
Add Interviewer	Click this link to add another row to the Interview Schedule grid.
	Under partial or no calendar integration, click the Notify check box for the new row if you want the system to send notifications to the newly added interviewer when you submit the interview.
	Under full calendar integration, if the Microsoft Outlook meeting invitation has already been sent, you must use Microsoft Outlook rather than Talent Acquisition Manager to add additional interviewers; Microsoft Outlook then sends a meeting invitation to the new interviewer. Microsoft Outlook also sends information about the new interviewer to the PeopleSoft system so it can add the interviewer to the schedule.
Notify Interview Team	Note. This check box appears only under partial or no calendar integration.
	Select this check box to make the system select all of the Notify check boxes for individual interviewers.
	This check box is simply a data entry shortcut: the system does not use this setting to determine who should receive a notification. If you select the Notify Interview Team check box and then deselect the Notify check box for an individual interviewer, the Notify Interview Team check box remains selected, but the system does not send a notification the deselected interviewer.

Venue Information and Location

Venue and Add/Maintain Venue Information	In the Venue field, select a physical location for the interview. Under full calendar integration, venues correspond to Microsoft Outlook resources.
	The available values are those that you set up in the Interview Facilities page. To modify venue details, or to add a new venue, click the Add/Maintain Venue Information link to access the Interview Facilities page.
Email	When you select a venue, its email appears in the grid. This is relevant only if you use full calendar integration, in which case the ability to book the venue using Microsoft Outlook depends on the venue email matching the corresponding resource email in Microsoft Outlook.
Appointment Status (venue appointment status)	If you use full calendar integration, and if the initiator receives a Microsoft Outlook calendar response to the invitation, the system updates the venue appointment status accordingly. Otherwise, users manually set the appointment status to <i>Accepted</i> , <i>Declined</i> , <i>None</i> (no response), and <i>Tentative</i> (tentatively accepted).
Location	If there is location information in the venue definition, the system enters that location information here, replacing any existing location text. You can modify the location text, and any changes that you make are saved to the venue definition.

Preview/Edit Meeting Request

Use the links in this section to access the Interview Request page, where you can personalize the text of the meeting invitation for this interview.

Note. This section appears only under partial calendar integration.

Interview Meeting Request and Applicant Meeting Request	Click the appropriate link to review and optionally modify the text of notifications that the system sends to interviewers or applicants. You can also add attachments to the notification.
	As long as you do not make any changes to the default notification, changes that you make to the interview date, time and location are automatically reflected in the notification. However, after you save any changes to the default text, the system no longer makes any updates to the text.
	Note. If you change the interview date, time, or location after you modify the notification text, you must make any necessary changes to the notification text manually.

Letter	
Letter	Select a letter that you want to send to the applicant when an interview is scheduled. Talent Acquisition Manager delivers three templates: <i>HRS_INT_LETTER_IS1,HRS_INT_LETTER_IS2</i> , and <i>HRS_INT_LETTER_IS3</i> .
Date Printed	Displays the date that you printed the letter. The system populates the field when you click the Generate Letter link or when the letter is generated by the HRS Letter Generation batch process.
Generate Letter	Click this link to generate the letter immediately. The system opens the generated letter in a new browser window, where you can print it or save it locally. Once the letter is generated, the Generate Letter link is no longer available and the letter is removed from the HRS Letter Generation batch process.
	When you generate a letter, the system creates a contact note entry on the Manage Applicant page: Contact Notes tab. The letter is an attachment to the note.
	If you click the Email Applicant link after generating a letter, the system automatically attaches the generated letter to the email.
Email Applicant	Click this link to display the Send Correspondence page, where you can send the applicant email. If you have generated or uploaded a letter, the Attachments grid on the Send Correspondence page includes the letter (although you can remove or replace it if you wish).
	After accessing the Send Correspondence page, enter the email subject and message, then send it to the applicant. When you send the email, the system creates a contact note on the Manage Applicant page: Contact Notes tab. The email attachments are saved as note attachments.
	See <u>Chapter 22, "Managing Applicants," Sending Correspondence and</u> <u>Recruitment Letters, page 635.</u>
Upload Letter	Click this link to upload a saved letter as an attachment. Most commonly, you use this link to upload a modified version of the original generated letter. However, it is not necessary to generate a letter before uploading one.
	When you upload a letter, the system creates a contact note entry on the Manage Applicant page: Contact Notes tab. The letter is an attachment to the note.
	If you click the Email Applicant link after generating a letter, the system automatically attaches the modified letter (rather than the original) to the email.

Include in Consolidated Letter	Select this check box to mark the interview for inclusion in a consolidated interview letter that lists all selected interviews. Selecting this check box makes the interview-specific fields and links inactive to suppress generation of a individual interview letter.
	If you select this check box for any interview, be sure to also generate the consolidated interview letter using the Consolidated Interview Letter group box that appears after the applicant's last interview section on this page.
Attachments and Notes	
Attachments	Use the Attachments grid to attach external documents, such as interview scripts, to the interview schedule.
	Click the Add Attachment link to add file attachments to the grid; the system prompts you to identify the file to be uploaded.
	When a file is uploaded, the default description is the file name. You can modify this description until you save or submit the interview, at which point it becomes read-only.
	To view an existing attachment, click its file name. The attachment opens in a new browser window.
Notes	Use the Notes grid to add notes related to the interview. You can also add attachments to individual notes.
	These notes are specific to the interview; they are not associated directly to either the job opening or the applicant.
Load JO Attachment (load job opening attachment) and Load JO Notes (load job opening notes)	Click these links to copy selected attachments and notes from the job opening to the interview. Job opening attachments and notes appear on the Activity & Attachments tab on the Job Opening page. Job opening attachments and notes are associated with specific audiences (<i>Private, Public,</i> or <i>Interview</i>), and when you load job opening attachments or notes into the interview, the system copies only the notes and attachments where the audience is <i>Interview</i> .

Buttons for Cancelling and Reinstating Interviews

Cancel Interview	Click the Cancel Interview button, which appears only after an interview has been saved and submitted, to cancel the interview. When the interview is cancelled, the system changes the Interview Status to <i>Cancelled</i> , and all fields for the cancelled interview become read-only. Although these changes appear to occur immediately, you still need to submit or save the interview to complete the cancellation.				
	Under full calendar integration, cancelling an interview also cancels the Microsoft Outlook meeting invitation.				
	Under partial or no calendar integration, cancelling an interview triggers notifications to participants whose Notify check boxes are selected.				
	You cannot cancel interviews that have attached evaluations or where the applicant has proceeded past the <i>Interview</i> disposition.				
Reinstate Interview	After an interview is cancelled, the Reinstate Interview button replaces the Cancel Interview button. Click the Reinstate Interview button to change the interview status to <i>Unconfirmed</i> and make the interview fields editable again. The system will not allow you to submit a reinstated interview without first changing the interview date or time or adding or deleting at least one interviewer.				
	Under full calendar integration, reinstating an interview creates a new Microsoft Outlook meeting invitation.				

Consolidated Interview Letter

This group box appears after the last interview listed for the applicant. Use it to generate an interview letter that lists all of the interviews where the Include in Consolidated Letter check box is selected.

Letter, Date Printed, Generate Letter, Email Letter, and Upload Letter	Use these fields to select a template and generate a consolidated interview letter using that template. These page elements work similarly to the ones that appear for individual interviews, except that when you generate the letter, the system brings in data from multiple interviews.		
	Note. Unlike individual interview letters, the consolidated interview letter cannot be generated by the HRS Letter Generation batch process. To produce a consolidated interview letter, you must use the Generate Letter link on this page.		
Select All Interviews and Deselect All Interviews	Click these buttons to select or deselect the Include in Consolidated Letter check box for all of the applicant's interviews that appear on the page. These buttons are simply a data entry shortcut. You can still change the settings for individual interviews after clicking these buttons.		

Exclude Past Dated Interviews	Select this check box before clicking the Select All Interviews button to prevent the button from selecting interviews on days before the current date. Interviews scheduled for the current date are not considered to be in the past; the system does not consider the interview time in making this determination.
	The Exclude Past Dated Interviews check box does <i>not</i> deselect past dated interviews, it just prevents them from being selected by the Select All Interviews button. For example, if you click the Select All Interviews button, then you subsequently select the Exclude Past Dated Interviews check box, any past dated interviews remain selected. To prevent those interviews from appearing in the consolidated interview letter, you need to deselect them either manually or by clicking the Deselect All Interviews button.

Applicant-Level Actions

These page elements appear at the end of each applicant section.

Add Interview	Click this button, which appears once per applicant (at the bottom of the Interview Schedule page) to add an additional interview section for the applicant.		
Launch Scheduler	Note. This link appears only under full calendar integration.		
	Click this link to open Microsoft Outlook so that you can review and update interview meeting invitations.		
	Recruiters who schedule interviews and therefore originate the Microsoft Outlook meeting invitations must have the PeopleSoft plug-in for Microsoft Outlook installed. The plug-in adds PeopleSoft-specific features to Microsoft Outlook, including the ability to send meeting changes back to Talent Acquisition Manager.		

Checking Participant Availability

Access the Interview Schedule page (click the applicant availability or interviewer availability icon on the Interview Schedule page) or the Venue Availability page (click the venue availability icon on the Interview Schedule page).

Interview Schedule							
Interview Dat	te: 06/02	/2009 関					
Interviewer:	Betty	Locherty					
Interviewer	Availability						
Time Zone	Start Time	End Time	Applicant Name	Location			
PST	PST 11:00AM 12:00PM Stewart Johannsen Level 42 Wilsreck Building 5 Gotarph Street Abouledeville New York						
PST 2:00PM 3:00PM Bob Montana Room 1, Ground Floor, Global Business Centre, 548 Sydweigh Boulevard San Francisco							
Return	Return						

Interview Schedule page

Modifying Interview Notification Text

Access the Interview Request page (click the Interviewer Meeting Request or Applicant Meeting Request link on the Interview Schedule page).

Schedule Interv	view
Interview Re	quest
Save	Return to Previous Page
Message Type a	
Contact Method:	EMail Meeting Request Type: Interviewer Meeting Request
Recipient Inform	
To:	HCMGENUser1@ap6023fems.us.oracle.com, HCMGENUser1@ap6023fems.us.oracle.com.
Sender Informati	on
From:	Betty Locherty
Message	
Subject:	Interview Schedule for Bob Montana on 2009-06-02
Message:	You are scheduled to interview 1027 Bob Montana on 2009-06-02 from 2:00 PM to 3:00 PM for Job Opening 30017 for HRIS Specialist. You should have already been contacted about this interview by the hiring manager or recruiter. This message is just to confirm the scheduled interview. The location entered into Online Recruiting for this interview is Room 1, Ground Floor, Global Business Centre, 548 Sydweigh Boulevard
Access:	Public 🔽
Attachment	
No Attachment ha	ave been added to this Message Request.
+ Add Attachme	<u>ent</u>

Interview Request page

Subject and Message	Review the subject and text of the message and make any necessary modifications.
Access	The system saves the message as a contact note for the applicant; choose whether the note is to be <i>Public</i> (the default) or <i>Private</i> . Anyone can view a public contact note; only the creator of the note can view a private note.
Add Attachment	You can optionally add attachments to the message. For example, you could attach a map to the interview venue.

Reviewing and Printing an Interview Summary

Access the Interview List page (click the View/Print All Interviews link on the Interview Schedule page).

Schedule Inter	rview						
Interview L	ist						
						P	rint this Page
Interview list for							
Applicant Name:		wis					
Interview Details	6						
Job Opening:	30017	HRIS	Specialist				
Description:	050 Route						
Interview 1							
Interview Sche	dule						
Name		Status	Interview Level	Time Zone	Date	Start Time	End Time
Patrick Seto		Unconfirm	Inhouse1	EST	06/02/2009	10:00AM	10:30AM
Job Opening:	30017	HRIS	Specialist				
Description:	050 Route						
Interview 2	000110010						
Interview Sche	dule						
Name		Status	Interview Level	Time Zone	Date	Start Time	End Time
Vicky Adler	cky Adler Unconfirm EST 06/02/2009 10:30AM 11:00AM						11:00AM
Return to Previous	Page						

Interview List page

This page summarizes the data on the Interview Schedule page in a simple printer-friendly format. The page lists all the interviews for one or more applicants for a single job.

Click the Print this Page link to print the interview list exactly as it appears on screen.

Completing Interview Evaluations

This section provides an overview of interview evaluations, lists prerequisites, and discusses how to:

• Complete an interview evaluation.

• Update a submitted evaluation.

Note. Only the scheduled interviewers (as entered on the Interview Schedule page) can create evaluations. Only administrators can update submitted evaluations.

Understanding Interview Evaluations

To complete an interview evaluation, you use the Interview Evaluation (HRS_INT_EVAL) component.

Creating Evaluations

To create a new interview evaluation, use the *Create Interview Evaluation* action, which displays the Interview Evaluation page and is available from these locations:

- The search results grid on the Find Applicants page (individual action).
- The Manage Applicants grid on the Job Opening page (individual action or group action).

When you use a group action, the Interview Evaluation page includes collapsible sections for each included applicant.

• The Applicant Activity grid on the Manage Applicant page (individual action).

You can also create an interview evaluation from the Interview Evaluations grid that appears on the Disposition Details - Interview page and on the Manage Applicant page: Applicant Activity tab: Interview Schedule/Evaluations section.

Completing Evaluations

The evaluation categories that appear on the Interview Evaluation page come from the interview evaluation template that is associated with the job opening's recruitment template.

Evaluators assign ratings to the individual categories, give an overall rating and recommendation, and enter any comments.

There are two options for saving an evaluation:

- The Save button saves data without submitting the evaluation; the evaluator can continue to work on the evaluation later.
- The Submit Evaluation button saves and submits the data and returns the user to the previous page; the evaluator cannot make any further changes unless an administrator reverses the submission using Send Back functionality.

When you submit an interview evaluation, the system sends a notification to all of the recruiters and hiring managers for the job opening.

Reviewing Evaluation Progress and Accessing Existing Evaluations

To view a list of interview evaluations for an application, use the Interview Evaluations grid. This grid appears in two places:

- On the Disposition Details Interview page that appears when you click the disposition *Interview* on the same three pages where you perform the *Create Interview Evaluation* action.
- On the Manage Applicant page, under the Applicant Activity tab, in the Interview Schedule/Evaluation section.

The Interview Evaluations grid lists all scheduled interviewers and, for submitted evaluations, the overall rating and recommendation. The grid also includes an Action column with links that the user clicks to access the Interview Evaluation page. The link text indicates whether the link is used to create a new evaluation, complete an already-started evaluation, or view a completed evaluation.

Updating Submitted Applications

When you set up your recruiting system, you can give administrators the ability to edit, delete, and send back submitted interview evaluations. To do this, select *Yes* in the Administrator Evaluation Edit field on the Recruiting Installation - Applicants page.

See Chapter 2, "Defining Installation Options for Recruiting," Defining Applicant-Related Settings, page 18.

When you grant administrators these additional privileges, administrators see an *Edit Evaluation* link rather than a *View Evaluation* link next to completed evaluations. Clicking this link displays the Interview Evaluation page, but in this mode, the Save and Submit Evaluation buttons are replaced by buttons that the administrator can use to:

• Edit the completed evaluation.

When an administrator edits an evaluation, additional fields show who edited the evaluation and when it was edited. The administrator can also enter comments regarding the changes.

- Delete the completed evaluation.
- Send back the evaluation, an action that reverses the evaluation submission as if the original evaluator had saved it without submitting it.

Prerequisites

Before you can interview applicants, you must set up the interview evaluation template.

See Chapter 9, "Setting Up Recruiting Templates," Setting Up Interview Evaluation Templates, page 165.

Before administrators can update submitted evaluations, you must select *Yes* in the Administrator Evaluation Edit field on the Recruiting Installation - Applicants page.

See Chapter 2, "Defining Installation Options for Recruiting," Defining Applicant-Related Settings, page 18.

Pages Used to Complete Interview Evaluations

Page	e Name	Definition Name	Navigation	Usage	
Find	Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicant, Find Applicant	Search for and select applicants.	

Page Name	Definition Name	Navigation	Usage	
Interview Evaluation	HRS_INT_EVAL HRS_VIEW_INT_EVAL	 To create a new evaluation, select <i>Create Interview</i> <i>Evaluation</i> in the Take Action or Group Action field on the Find Applicants page, on the Manage Applicant page, or on the Job Opening page. To access an existing evaluation, click the View Evaluation or Update Evaluation link on the Disposition Details - Interview page or in Interview Evaluations grid on the Manage Applicant page: Applicant Activity tab: Interview Schedule/Evaluation section. 	Create, update, or review interview evaluations.	
Interview Evaluations	HRS_INT_EVAL_LST	Self Service, Recruiting Activities, Interview Evaluations, Interview Evaluations	Create, update, or review interview evaluations using self-service.	
Evaluation Rating Comments	HRS_INT_EVAL_SEC	Click the Comments icon for a rating category on the Interview Evaluation page.	Enter evaluation comments for a specific category.	

Creating an Interview Evaluation

Access the Interview Evaluation page (select *Create Interview Evaluation* in the Take Action or Group Action field on the Find Applicants page, on the Manage Applicant page, or on the Job Opening page).

Interview Eval	uation						
Complete the evaluation form by providing an interview rating for each category, an overall rating and a recommendation. Provide any appropriate comments. Choose the Submit Evaluation button when you are done.							
Save Submit Evaluation Cancel Return to Previous Page							
Stewart Johannsen							
👻 Gregory Wu							
Applicant ID:	1017		Applicant Name:	Greg	ory Wu		
Job Opening ID:	30017		Posting Title:	HRIS	Specialist	t	
Interview Date:	04/22/2011	31	Interview Type:				
Rate Applicant							
Category		h	nterview Rating		Score	Comments	
Communication Skills		ſ		•	0		
Education/Training		[•	0		
Work Experience		[•	0		
Technical Skills		[•	0		

Interview Evaluation page (1 of 2)

Recommendation	
Overall Rating:	
Recommendation:	
General Comments	
Save Submit Evaluation Cancel Return to Previous Page	
Expand All Collapse All	

Interview Evaluation page (2 of 2)

Evaluator Actions

Save	Click this button to save your work without submitting evaluations or navigating away from this page. If the page includes sections for multiple applicants, the system saves all sections except those for which no rankings have been entered.
Submit Evaluation	Click this button to submit your completed evaluations and return to the previous page. All evaluations on the page must be complete before you can submit them; the system displays error messages if there is any missing data.
Cancel and Return to Previous Page	Click to return to the previous page without saving or submitting your work.

<Applicant Name>

The page displays an expandable section for each applicant you are evaluating. Several read-only fields at the top of this section give basic information about the applicant and the job opening. Additional fields identify the user who submitted the evaluation and the date that the evaluation was submitted.

Interview Date and Interview Type	Displays the date and interview type that were entered when the interview was scheduled. You can override the data in these fields if necessary.
	If there is no interview scheduled for the applicant, you can still create an evaluation. The default interview date is the current date.

Rate Applicant				
Category	The grid lists the rating categories that are associated with the interview template for the job opening.			
Interview Rating and Score	Select a rating for the given category. The system displays the score that is associated with the rating you select. Ratings are associated with scores in the interview evaluation template for the job opening.			
Comments	Click the Comments icon to access the Evaluation Rating Comments page and enter a comment for the specified category.			
Recommendation and General Comments				
Overall Rating	Enter an overall rating. Select from the values that were defined in the Interview Evaluation Ratings page.			
	See <u>Chapter 8, "Setting Up Additional Recruiting Definitions," Creating</u> Interview Ratings, page 116.			
Recommendation and Reason	Enter an overall recommendation. Select from the statuses are defined for the Interview recruitment phase.			
	See <u>Chapter 4, "Setting Up Recruiting Statuses," Defining Statuses and</u> <u>Reasons Codes, page 50.</u>			
	If the interview evaluation template is configure to require a reason for the rating you select, the Reason field appears. The available values are the reasons that are associated with the status that you selected as the recommendation.			
General Comments	Enter freeform text comments about the applicant.			

Updating a Submitted Evaluation

Access the Interview Evaluation page in administrative update mode (click the Edit Evaluation link in the Interview Evaluations grid on the Disposition Details - Interview page).

Manage Applicant: Stewart Johannsen						
Interview Eva	Interview Evaluation					
-		rview rating for each category, ar Submit Evaluation button when yo		-	nd a recommend	lation
Edit Ser	nd Back Delete	Return to Previous Page	<u>e</u>			
🗢 Stewart Johanns	sen					
Applicant ID:	1031	Applicant Name:	Stewa	art Johar	nnsen	
Job Opening ID:	30017	Posting Title:	HRIS	Speciali	ist	
Submitted By:	HCQAN-R	Date Submitted:	06/02	2/09 5:17	7PM	
Interview Date:	06/02/2009	Interview Type:	Inhou	ise1		
Rate Applicant						
Category		Interview Rating		Score	Comments	
Communication Skill	ls	Excellent		2	 ,	
Education/Training		Excellent		2		
Work Experience		Average		1		
Technical Skills		Excellent		2		

Interview Evaluation page in administrative update mode (1 of 2)

Recommendation			
Overall Rating:	Excellent		
Recommendation:	020 Make Offer		
General Comment	S		
			<u>[</u>]
dited By:		Date Edited:	
Edit Evaluation Co	mments		
			ه
E d'it	ad Daak	Deturs to Dravievo Dece	
Edit Se	nd Back Delete	Return to Previous Page	

Interview Evaluation page in administrative update mode (2 of 2)

Note. Only administrators can update submitted evaluations. The option for administrators to edit evaluations is available only if activated in the Recruiting Installation - Applicants page.

Administrator Actions

Edit

Click the Edit button to make a submitted evaluation editable. When the page changes to editable mode:

- The Send Back and Delete buttons disappear.
- The Save button appears.

To exit editable the page without saving changes, click the Return to Previous Page link.

- The Edited By,Date Edited, and Edit Evaluation Comments field appear.
- The administrator can update the original evaluator's ratings, recommendations, and comments.

Send Back	Click this button to send the evaluation back to the original evaluator. Sending an evaluation back reverses the evaluation submission; it is as if the original evaluator saved it without submitting it.
	If the administrator edited the evaluation before sending it back, changes to the original evaluator's data is kept, but the Edited By,Date Edited, and Edit Evaluation Comments fields are cleared.
Delete	Click this button to delete the evaluation entirely. All data is cleared, and the system displays the page from which you accessed the evaluation.
	The Interview Evaluations grid no longer displays data for the deleted evaluation. Instead, the Action field displays <i>Evaluate Applicant</i> , the text that appears when no evaluation data exists.

Edit Mode Page Elements

These page elements appear after an administrator clicks the Edit button. If the administrator saves changes, these fields remain visible to anyone else who views the evaluation. These fields provide the only audit trail for modified evaluations. If the administrator later sends the evaluation back to the original evaluator, the system clears these fields, but retains any changes to the evaluation itself.

Edited By and Date Edited	These fields display system-generated information about who edited the evaluation and when it was edited.
Edit Evaluation Comments	An administrator who edits an evaluation uses this field to enter comments related to the edit.

Finalizing Interviews and Sending Evaluation Reminders

This section provides an overview of interview evaluation reminders and discuss how to send interview evaluation reminders.

Understanding Interview Finalization and Evaluation Reminders

The Interview Evaluation Reminder (HRS_INT_EVAL) Application Engine process performs these two tasks:

- Applies the interview status *Completed* when all evaluations for an interview have been completed.
- (Optional) Sends a notification (HRS_INTVW_EVAL_RMNDR) to interviewers who have not yet submitted evaluations for interviews that are complete.

The run control page for the process includes a check box that you use to indicate whether to perform this task.

To prevent the system from processing every interview in the system, you must specify a date range for the interviews to be processed. You can enter actual dates, or you can specify the number of days to look back from the current date.

Page Name	Definition Name	Navigation	Usage
Interview Evaluation and Final	HRS_RUN_INT_REM	Recruiting, Administration, Interview Evaluation Reminder, Interview Evaluation and Final	Run a process to mark interviews complete and to optionally send interview evaluation reminders.

Page Used to Finalize Interviews and Send Evaluation Reminders

Finalizing Interviews and Sending Evaluation Reminders

Access the Interview Evaluation and Final page (Recruiting, Administration, Interview Evaluation Reminder, Interview Evaluation and Final).

Interview Evaluation and Final	
Run Control ID: PS	Report Manager Process Monitor Run
Interviews Scheduled From: 06/01/2009	To: 06/01/2009 🛐
OR	
Between: and:	days prior to today
Send Evaluation Reminders	
Return to Search	Add Update/Display

Interview Evaluation and Final page

Interviews Scheduled From and To	Enter specific dates to be used when processing interviews. The system processes interviews that are scheduled on or between the dates you enter.
Between and And <number of=""> days prior to today</number>	Enter two numbers that define how many days to look back when processing interviews. For example, enter <i>1</i> and <i>7</i> to process interviews that are scheduled for one to seven days before the day that the process runs.

Send Evaluation Reminders Leave this check box selected if you want the Interview Evaluation Reminder process to send reminder notifications to interviewers who have not completed evaluations for the interviews that the system processes. Deselect this check box to skip reminder processing.

Note. The Interview Evaluation Reminder process always applies the *Completed* status to completed interviews that it processes. There is no option to deactivate this part of the process.

Making Final Recommendations

This section provides an overview of final recommendations, lists a prerequisite, and discusses how to make final recommendations.

Understanding Final Recommendations

After all of an applicant's interview evaluations are complete, the recruiter can make a final recommendation regarding the applicant. To make a final recommendation, use the Manage Applicant - Disposition Details: Interview page.

To make a final recommendation, enter a recommendation and an optional reason. These values come from the statuses that are defined for the Interview recruitment phase.

You can specify which letter you want sent to the applicant telling them of your recommendation. However, you must save the entered data and then return to the Disposition Details - Interview page to print the letter immediately or send it using email. Otherwise, the letter can be printed using the HRS Letter Generation batch process.

Prerequisite

Before you make a final recommendation, you must have interview evaluations forms completed.

See Chapter 18, "Interviewing Applicants," Completing Interview Evaluations, page 507.

Page Used to Make Final Recommendations

Page Name	Definition Name	Navigation	Usage
Manage Applicant - Disposition Details: Interview	HRS_APP_RCMNT	Recruiting, Find Applicants, Find Applicants In the applicant search results grid, click the Interview link in the Disposition column.	Recommend a disposition for an applicant after interviews are complete.

Making Final Recommendations

Access the Disposition Details: Interview page (on the Find Applicants page, click the Interview link in the Disposition column).

Manage Applicant: Thomas Trummer						
Disposition Details: Interview						
-						
Applicant Name:	Thomas Trummer	Date Ente	red: 06/25/2009			
ID:	600010					
		🗃 <u>Print Job Ope</u>	ning			
Posting Title:	Administrative Assistant (Federal Operations)	Job Opening ID:	600004			
Job Opening Status:	010 Open	Job Type:	Standard			
Job Title:	Assistant-Administrative	Job Code:	170005			
Position Number:	19000018 Administrative Assistant					
Business Unit:	GBIBU Global Business Institute BL	J				
Job Family:	KADMIN Administrative Support					
Save <u>Return</u>	n to Previous Page					
Final Recommendation	n					
Final Recommendation Reason: Average Score:	n: 005 Interview	×				

Disposition Details: Interview page (1 of 2)

Interview Eva	aluations				Customize Vie	w All 🖥	First 🚺 1-3 of 3	3 🚺 Last	
nterviewer	Job		Interview Rating	Interview Type	Recommendation	Score	Action		
Betty Locherty	<u>Adminis</u> Assista			Inhouse1		0.000	Evaluate Applica	nt	
Jake Oglevy	<u>Adminis</u> Assistai			Inhouse1		0.000	Evaluate Applica	nt	
Ponciano Batalang	<u>Adminis</u> Assistai		Excellent	Inhouse1	020 Make Offer	7.000	Complete Evalua	ation	
+ Create Ne		ition							
Interview So	chedule				<u>Cı</u>	istomize	Find View All	First 🚺 1	of 1 🕨 Last
Date	Start Time	End Time	Time Zone	nterviewer	Location		Job	Cor	nments
<u>2009-07-31</u>	5:00AM	6:00AM	PST I	3etty Locherty	15 Porter Road Riverside New Grange Corporate Headquarte		<u>Administrative</u> <u>Assistant</u>		.
Z Manage	Interview	<u>/s</u>							
 Disposition 	History								
)isposition		Status		Reason	Status Date	Offer II)		
Interview		005 Interv	iew		07/14/2009				
Edit Disposi	ition Deta	ails							
Save	Return	to Previo	us Page						

Disposition Details: Interview page (2 of 2)

Final Recommendation

Final Recommendation	Select a final recommendation.
Reason	Select a reason for the final recommendation.

Interview Evaluations

This grid lists all scheduled interviewers and, for submitted evaluations, the overall rating and recommendation.

Action	Displays text that indicates the status of the evaluation. When appropriate, he Action column text is a link that the user clicks to access the Interview Evaluation page. Values in this column include:
	Evaluate Applicant: This appears when there is no evaluation data.
	This is an active link only for an evaluator's own evaluation. Clicking the link displays the Interview Evaluation page, where the evaluator can begin the evaluation.
	<i>Complete Evaluation:</i> This appears when the evaluation has been saved, but not yet submitted.
	This is an active link only for an evaluator's own evaluation. Clicking the link displays the Interview Evaluation page, where the evaluator can continue to work on the evaluation.
	View Evaluation: This appears when the evaluation has been submitted
	This link is active regardless of who created the evaluation. Clicking the link displays the Interview Evaluation page in read-only mode.
	<i>Edit Evaluation:</i> Administrators see this instead of <i>View Evaluation</i> if you enabled administrator evaluation edits by selecting <i>Yes</i> in the Administrator Evaluation Edit field on the Recruiting Installation - Applicants page.
	Clicking this link displays the Interview Evaluation page, but in this mode, the Save and Submit Evaluation buttons are replaced by buttons that the administrator can use to edit, delete, or send back the completed evaluation.

Interview Schedule

This group box displays the applicant's scheduled interviews.

Disposition History

This group box displays the applicant's disposition history.

Edit Disposition Details

Use this group box to edit the applicant's disposition status.

See Chapter 22, "Managing Applicants," Reviewing Disposition Details, page 615.

Reviewing Interview Schedules and Evaluations

This section discusses how to:

• Review applicant interview schedules and evaluations.

- Review personal interview calendars.
- Review team interview schedules.

Pages Used to Review Interview Schedules and Evaluations

Page Name	Definition Name	Navigation	Usage
Manage Applicant page: Applicant Activity tab: Interview Schedule/Evaluation section	HRS_MANAGE_APP	Recruiting, Find Applicant Click an applicant name link in the Search Results grid on the Find Applicants page. Access the Applicant Activity tab: Interview Schedule/Evaluation section.	Review an applicant's interview schedule and interview evaluations.
Interview Calendar	HRS_INT_CLNDR	 Recruiting, Interview Calendar, Interview Calendar Self Service, Recruiting Activities, Interview Calendar, Interview Calendar 	Review the interview calendar for scheduled interviews to which you are associated.
Schedule Notes	ER_INTCMNT_MON_SEC	Click the Notes link on the Interview Calendar page	View schedule notes.
Interview Team Schedule	HRS_SEL_TEAM_SCHED	Self Service, Recruiting Activities, Interview Team Schedule, Interview Team Schedule	View a list of job openings or applicants where you are part of the interview team, and access detailed interview schedule information as needed.

Reviewing Applicant Interview Schedules and Evaluations

Access the Manage Applicant page: Applicant Activity tab: Interview Schedule/Evaluation section (on the Manage Applicant page, click the Applicant Activity tab and then the Interview Schedule/Evaluation link).

				JORY WU In interview for Gre	egory Wu for t	the job HRIS Specialist -	- 30017
Name:	Gregory Wu		Applica	ant Type:	External Applicant		
Applicant ID	: 101	1017		POI Ty	be:		
Contact:	Pho	ne		Status		010 Active	
Phone:		289-6754		Addres		3400 Mountain View D)rive
Email:	HCM	GENUser1	@ap60	23fems.us.oracle	e.com	Altanta, GA 30080	
Image: Select Action Image: Applicant Activity Contact Notes Applicant Data Current Status Interview Schedule/Evaluation Expenses							
Interview S	Schedule				Customize	Find View All	🛯 1-2 of 2 🗋 Last
Date	Start Time	End Time	Time Zone	Interviewer	Location	Job	Comments
<u>2009-06-08</u>	9:30AM	10:00AM	PST	Stephanie Jorgensen		HRIS Specialist	
2009-06-02	3:00PM	3:30PM	PST	Betty Locherty		HRIS Specialist	
Manage Interviews							

Manage Applicant page: Applicant Activity tab: Interview Schedule/Evaluation page section (1 of 2)

Interview Ev	aluations			<u>Customize</u> View /		First 🚺 1-3 of 3 🗋 Last
Interviewer	Job	Interview Rating	Interview Type	Recommendation	Score	Action
Betty Locherty	<u>HRIS</u> Specialist				0.000	Evaluate Applicant
Jake Oglevy	<u>HRIS</u> Specialist				0.000	Evaluate Applicant
+ Create Net	w Evaluation					
	with Cont	tact Notes	Applicant D	lata		
Applicant Acti	vity <u>Com</u>	lact notes	Applicant			
Current Statu		w Schedule/		Expenses		
Current Statu			Evaluation			
Current Statu	<u>s</u> Intervie	w Schedule/	Evaluation	Expenses		
Current Statu	<u>s</u> Intervie	w Schedule/	Evaluation	Expenses		

Manage Applicant page: Applicant Activity tab: Interview Schedule/Evaluation page section (2 of 2)

Interview Schedule

Date	Click this link to display the Interview Schedule page, where you can edit this interview.
Job	Click this link to display the Job Opening page.
Manage Interviews	Click this link to access the Select Job Opening for Interview page, where you select one of the applicant's associated job openings before continuing to the Interview Schedule page to create or edit interviews.

Interview Evaluations

This grid lists all scheduled interviewers and, for submitted evaluations, the overall rating and recommendation.

Action	Displays text that indicates the status of the evaluation. When appropriate, the Action column text is a link that the user clicks to access the Interview Evaluation page. Values in this column include:
	• <i>Evaluate Applicant:</i> This appears when there is no evaluation data.
	This is an active link only for an evaluator's own evaluation. Clicking the link displays the Interview Evaluation page, where the evaluator can begin the evaluation.
	• <i>Complete Evaluation:</i> This appears when the evaluation has been saved, but not yet submitted.
	This is an active link only for an evaluator's own evaluation. Clicking the link displays the Interview Evaluation page, where the evaluator can continue to work on the evaluation.
	• <i>View Evaluation:</i> This appears when the evaluation has been submitted.
	This link is active regardless of who created the evaluation. Clicking the link displays the Interview Evaluation page in read-only mode.
	• <i>Edit Evaluation:</i> Administrators see this instead of <i>View Evaluation</i> if you enabled administrator evaluation edits by selecting <i>Yes</i> in the Administrator Evaluation Edit field on the Recruiting Installation - Applicants page.
	Clicking this link displays the Interview Evaluation page, but in this mode, the Save and Submit Evaluation buttons are replaced by buttons that the administrator can use to edit, delete, or send back the completed evaluation.

Reviewing Personal Interview Calendars

Access the Interview Calendar page (Recruiting, Interview Calendar, Interview Calendar).

Interview Calendar	
Display Week Of: 11/28/2011	
Previous Week	Next Week
2011-11-28	2011-12-01
Monday I-2 of 2	Thursday I of 1 D
 Paulo Coelho 8:00AM - 9:00AM PST Job Opening: <u>503708</u> Unconfirmed Location: Room 1, ground Floor, global Business Centre, 548 Sydweigh Boulevard san Francisco Sonia Nayar 10:00AM - 11:00AM PST Job Opening: <u>503708</u> Unconfirmed Location: Room 1, ground Floor, global Business Centre, 548 Sydweigh Boulevard san Francisco 	There are no interviews scheduled on this day
2011-11-29	2011-12-02
Tuesday I of 1	Friday I of 1 D
There are no interviews scheduled on this day	There are no interviews scheduled on this day

Interview Calendar page

Note. This is a partial screen shot.

Display Week Of	Enter a date. The calendar shows the calendar for the week (Monday through Sunday) of the date you enter.
Previous Week and Next Week	Click these links to move forward or backwards through the interview calendar.

<day of="" week=""></day>	Each weekday has its own group box on the calendar; Saturday and Sunday appear together in the last group box on the page.
	Interview data that appears on the calendar includes the applicant's name, the interview start and end time, the job opening, and the interview location. The applicant name and the job opening ID appear as links if the user has security access to the Manage Applicant page and the Job Opening page, respectively.
	As long as they have access to the Job Opening page, interviewers can access the job opening from the interview calendar, even if they would not normally have row-level access to the specific job opening.
	If you use full or partial calendar integration, the interview status also appears for each interview.
(Comments)	If interviewer-specific comments exist, the interviewer sees a comments icon alongside the rest of the interview information. Clicking the icon opens a page with the complete text of the comment.

Reviewing Team Interview Schedules

Access the Interview Team Schedule page (Self Service, Recruiting Activities, Interview Team Schedule, Interview Team Schedule).

Interview	/ Team Schedule				
Schedule with	Job Opening <u>Schedule wi</u>	ithout Job Opening			
list of applicant	re the Job Opening details and is scheduled to be interviewed	I for the selected Job Ope	ning.		
Team Schedu	le		e View All 🗠 F	irst 🚺 1-3 of 3 🕨 Last	
Job Opening	Job	Department Description	Description	View Schedule	
503708	Bring Your Arbitration Experience to Labor Relations	Finance and Administration	010 Review	View Schedule	
300075	075 Event Coordinator-NC Human Resources 010 Review <u>View Schedule</u>		View Schedule		
10293	Maintenance Manager	Maintenance Services	010 Review	View Schedule	

Interview Team Schedule page

This page has links for two subsections:

• Schedule With Job Opening

In this subsection, the Team Schedule grid lists the jobs where the user is scheduled to interview applicants.

• Schedule Without Job Openings

In this subsection, the Team Schedule grid lists the applications without job openings where the user is scheduled to interview the applicant.

In both subsections, the Team Schedule grid provides a link to the relevant interview schedule.

Chapter 19

Making Job Offers

This chapter discusses how to:

- Create job offers.
- Approve job offers.
- Edit or delete job offers.

Creating Job Offers

This section provides an overview of job offers, lists prerequisites, and discusses how to create job offers.

Understanding Job Offers

This section provides an overview of job offers.

Offer Creation

To prepare a job offer, use the Prepare Job Offer page.

Note. After you save or submit the job offer, the page title changes to Disposition Details: Offer.

Access the page by selecting the *Prepare Job Offer* action for an applicant. This action is available from multiple locations:

- The results grid on the Find Applicants page.
- The Manage Applicant page.
- The Applicants grid in the Manage Applicants section of the Job Opening page.

When you prepare an offer, the system provides default values when possible. For example, if the job opening has a primary hiring manager and primary recruiter, the system uses these as default values in the Hiring Manager and Recruiter fields on the Prepare Job Offer page. The system also enters the current date as the offer date. You can override these values.

You need to enter offer-specific details such as the start date for the job offer, the components of pay that you are offering the applicant, and the template to use for the offer letter.

Position and Job Code Information

The Prepare Job Offer page displays job information that comes from the job opening, including the business unit, position number, and job code. If the job opening is associated with multiple positions or job codes, you can select the one to which the offer applies.

There are two situations where position and job code data are not available to be brought into the job offer:

- If you initiate the offer process for an applicant who is not linked to a job opening.
- If you initiate the offer process for an applicant who is linked to a continuous job opening that doesn't have position or job code data.

In these situations, you must enter the necessary data on the Prepare Job Offer page. The requirements for position and job code data depend on your position management settings:

• *Full position management:* All offers must include a position number.

When you enter a position number in the job offer, the system brings in the associated job code.

- Partial position management:
 - Offers that are not associated with any job opening must include a job code; a position number is optional.
 - Offers that are related to continuous job openings can be submitted without a position or job code, but you will not be able to prepare the applicant for hire without at least a job code.

Online Job Offers

In the Recruiting Installation - Applicants page, you can configure the system to support online job offers for employees and for external applicants who are registered users of PeopleSoft Candidate Gateway. When this functionality is active, you can post offers to Candidate Gateway, and applicants can review the posted offers and then accept or reject the offer online.

When you post a job offer, the system sends the applicant an email notification with a link to Candidate Gateway. If the applicant's contact information doesn't have an email address, you cannot post the job offer online. The system also creates a contact note for the applicant, noting that the offer was posted.

When online job offer functionality is active, the Prepare Job Offer page displays several additional page elements that support the online job offer process, including:

• An Applicant section that displays certain applicant profile information, including the applicant type and whether the applicant is a registered user of Candidate Gateway.

This section also shows the applicant's preferred contact method and includes a Notify check box that must be selected before you post an offer online. Selecting the Notify button (which is selected by default for applicants whose preferred contact method is *Email*) causes the system to send the email notification to the applicant when you post the offer.

• An offer expiration date.

The system provides a default date that it calculates based on the system setting (in the Recruiting Installation - Applicants page) that specifies how many days online job offers remain active. You can override the default value.

When an online offer expires, it becomes read-only.

• An Attachments section for the files, URLs, and notes that you want to make available to the applicant along with the offer.

The offer letter that you generate is always added to the attachments grid. You can also manually add additional attachments, including both applicant-specific attachments that you manually upload and generic organizational documents that have been made available.

• Buttons for posting and unposting offers to Candidate Gateway.

You might unpost job offers if they have been withdrawn or modified. When you modify a job offer, saving the changes does not update the online offer in Candidate Gateway. Instead, you must unpost the offer and then repost it.

Offer Letters

Talent Acquisition Manager uses Oracle Business Intelligence Publisher (BI Publisher) to generate recruitment letters, including offer letters.

When you enter job offer information, you choose a template to use for the offer letter. After the offer is submitted (and, if necessary, approved), you can then generate the letter manually on the Disposition Details: Offer page. If you do not generate a letter manually, then the system adds the letter to the queue for the HRS Letter Generation process (HRSLETTR). This process generates all queued letters in batch.

The links that you use to generate a letter from the job offer are not available when the offer is in an editable state, even if the offer has been submitted and approved. If you edit an offer, you must resubmit it before generating the letter. Submitting makes the offer fields read-only, thus activating the links for generating the letter. This behavior ensures that any changes to the offer are saved before the letter is generated, so the letter always brings in the most current offer amounts.

To generate a letter from the job offer, use these links:

• Generate Letter

Click this link to generate an offer letter based on the selected template. The letter opens in a new window where you can review and optionally update it. If you make changes, save the modified letter to your local disk so that you can upload the revised version.

When you generate the letter, the system enters the current date in the Date Printed field, generates a contact note for the applicant, and removes the letter from the HRS Letter Generation process queue.

Note. The system does not create notes for offer letters that are generated in batch.

Email Applicant

Click this link to access the Send Correspondence page. If you manually generated an offer letter, then the Send Correspondence page includes the offer letter as an attachment to the email. You can manually remove it from the Attachment grid. When you send the correspondence, the system generates a contact note for the applicant; the contact note includes any attachments that were in the email.

• Upload Letter

Click this link to upload a letter file from a local disk. Typically, you are uploading a modified copy of the letter that you created by clicking the Generate Letter link.

When you upload a letter, the system creates a contact note for the applicant. The contact note includes the offer letter attachment.

Components of Pay

The offer must include compensation information. This takes the form of one or more components of pay such as base salary, bonuses, car and meal allowances, and so forth. When you enter components of pay, you select from components that you set up in the Offer Component Type and Offer Component pages.

See Chapter 8, "Setting Up Additional Recruiting Definitions," Setting Up Job Offer Components, page 117.

Offer Statuses

Offer statuses are one of the six types of statuses that you configure when you set up recruiting statuses. The status change effects that are defined for the system will automatically update the offer status as appropriate, but you can also manually set the offer status except during the approval process.

When you create a new job offer, the system assigns the initial offer status. If approval processing is active, the initial status is *Pending Approval*. Once all approvals are complete, the status is *Extend*.

If approval processing is not active, the initial status is *Extend*.

If you use the Save for Later button to save your work without submitting the job offer, the system sets the status to *Draft*.

Prerequisites

Before you prepare a job offer, you must:

1. Set up the offer component type on the Offer Component Type page.

See <u>Chapter 8, "Setting Up Additional Recruiting Definitions," Creating Job Offer Component Types,</u> page 119.

2. Set up the offer component on the Offer Component page.

See <u>Chapter 8, "Setting Up Additional Recruiting Definitions," Entering Job Offer Component</u> Information, page 119.

3. Set up any organization-level attachments.

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring Attachments.

4. (Optional) Activate job offer approvals on the Recruiting Installation - General page.

See <u>Chapter 2</u>, "Defining Installation Options for Recruiting," Setting Up Recruiting Installation Settings, page 10.

Page Name	Definition Name	Navigation	Usage
Find Applicant	HRS_REC_SCHAPP	Recruiting, Find Applicant	Search for and select applicants.
Prepare Job Offer	HRS_APP_RCMNT	Select <i>Prepare Job Offer</i> in the Take Action field in the Search Results group box on the Find Applicants page.	Create a job offer.
Organizational Level Documents	HRS_OFF_SELATC_SEC	In the Attachments section of the Prepare Job Offer page, select <i>Organizational</i> <i>Level Document</i> in the Source field and then click the Add Attachment link.	Select items from your organization's library of existing attachments, and attach them to the job offer. See <i>PeopleSoft HCM 9.1</i> <i>Application Fundamentals</i> <i>PeopleBook</i> , "Working with Common Components," Configuring Attachments.
Post Online Job Offer	HRS_OFFER_SEND_SEC	Click the Post button on the Prepare Job Offer page.	Post a job offer to Candidate Gateway.

Pages Used to Prepare Job Offers

Creating a Job Offer

Access the Prepare Job Offer page (on the Find Applicants page, select *Prepare Job Offer* in the Take Action field in the Search Results group box).

Manage Applicant	Manage Applicant: Terry Shadbolt			
Prepare Job 0	Offer			
Applicant Name:	Terry Shadbolt	Date Entered:	07/27/2004	
ID:	4			
		🛃 <u>Print Job Ope</u>	ening	
Posting Title:	Administrative Assistant	Job Opening ID:	30004	
Job Opening Status:	010 Open	Job Type:	Standard	
Job Title:	Assistant-Administrative	Job Code:	170005	
Position Number:	19000018 Administrative Assistant			
Business Unit:	GBIBU Global Business Institute BU			
Job Family:	KADMIN Administrative Support			
Offer				
Onus fact star	hanit Deet Add Deviced Offer U	Delete Of	fer Cancel Return to Previous Page	
Save for Later Su	Ibmit Post Add Revised Offer Ur	npost Delete Of	fer Cancel Return to Previous Page	

Prepare Job Offer page (1 of 4)

Offer Details		
Job Opening:	30004	Administrative Assistant
Business Unit:	GBIBU	
Position Number:	19000018	
Job Code:	170005	
Offer Date:	05/31/2009	
Commencement Date:	31	
Offer Expiration Date:	06/10/2009	
Hiring Manager:	KU0003	Jean Parsons
Recruiter:	KU0068	Marc Kessler
Created By:	Betty Locherty	
Applicant		
Applicant Type:	External Applicant 💌	Registered
Preferred Contact:	Phone 💌	Notify
Status		
Status:	010 Extend	
Reason:		
Offer Letter		
Letter:		Date Printed:
	Generate Letter Email	Applicant Upload Letter

Prepare Job Offer page (2 of 4)

	Minimum	Midpoint	Maximum	
Hourly	16.044231	20.055289	24.066346	
Daily	128.350000	160.440000	192.530000	
Monthly	2781.000	3476.250	4171.500	
Annual	33372.000	41715.000	50058.000	
Job Offer Componer	nts			
Component	*Offer A	mount	Currency Frequency	
Base Salary	-	4000.00 🛒	USD V Monthly	- Î

Prepare Job Offer page (3 of 4)

	d Links Notes	Action		
Document Description	Attached File Required View			
GBIBU Drug Testing Policy PDF	F GBIBU_Substance_Abuse_and_Testing_Policy.pdf		*	Î
GBIBI Benefits PDF	OF GBIBU_Benefits.pdf		2	Î
Source: Organizational Leve	I Document 💌 Add Attachment			
Comments				1.41
Comments			2	∎≪
Comments			5	- *
Comments			2	1 (
			1	9 (K
Added By:			<u>ع</u>	1 (
Comments Added By: Last Updated By: Add Another Comment	Previous Comment Next Commen	t	<u></u>	T 🎸
Added By: Last Updated By:	Previous Comment Next Commen	t		

Prepare Job Offer page (4 of 4)

Print Job OpeningClick to access the Select Job Openings page, where you configure and
generate a printed version of the job opening data.See Chapter 21, "Managing Job Openings," Printing Job Openings, page
595.

Offer Details	
Job Opening	Displays the job opening ID and posting title.
Business Unit	Displays the business unit that is associated with the job opening.
Position Number	This field appears only if the system is configured for full or partial position management. Under full position management, a position number is required. Under partial position management, it is optional.
	Initially, this field displays the position number, if any, that is associated with the job opening. If the job opening is associated with multiple positions, you can select any of the associated positions.
	If the offer is not associated with a job opening, or if it is associated with a continuous job opening that doesn't have position data, you can manually enter a value (and must do so under full position management).
Works Council ID	This field appears if the Optional Works Council option is selected on the Recruiting Installation - General page.
	The system automatically displays the works council ID associated with the job opening. If there is no job opening associated with the job offer you can enter one.
Job Code	Initially, this field displays the job code that is associated with the job opening. If the job opening is associated with multiple jobs, you can select any one of the associated job codes.
	If the offer includes a position number (required under full position management), the system enters the associated job code.
	If the offer is not associated with a job opening, then you must manually enter either a job code or position number.
	If the job opening is a continuous job opening without job code data, then the job code is optional. However, a job code will be required before you can prepare the applicant for hire.
Offer Date	Enter the date the offer is effective.
Commencement Date	Enter the date that the applicant is to report for work. Although you can submit a job offer and generate an offer letter without entering a date, a valid job offer should include a commencement date.
Offer Expiration Date	This field appears only if the system is configured to allow online job offers for this job opening's regulatory region.
	The field initially displays a default expiration date that is derived from the system-level default number of days that a job offer remains active (as configured on the Recruiting Installation - Applicants page).
	You can override the default date. The applicant's offer page in Candidate Gateway immediately reflects any changes that you make after the offer is posted.

Hiring Manager	Displays the primary hiring manager for the job opening.
Recruiter	Displays the primary recruiter for the job opening.
Created By	Displays the originator of the job opening.

Applicant

This section appears only if the system is configured to allow online job offers for this job opening's regulatory region.

Applicant Type	Displays <i>Employee, External Applicant,</i> or <i>Non-Employee</i> . Non-employees are applicants who, although not current employees, already have data in the PeopleSoft HCM system.
Registered	If the applicant type is <i>External Applicant</i> or <i>Non-Employee</i> , this check box is selected if the applicant is a registered user of Candidate Gateway. Only registered applicants can see online job offers.
	Employees do not need to register to use Candidate Gateway, and therefore this check box is not selected if the applicant type is <i>Employee</i> .
Preferred Contact and Notify	The Preferred Contact field displays the preferred contact method as established in the applicant's profile.
	If the preferred contact method is <i>Email</i> , the Notify check box is selected and the system automatically sends an email notification when the job offer is posted.
	If the preferred contact method is anything else, the Notify check box is initially not selected, and you must manually select this check box before posting an online job offer. (If the applicant does not have an email address on file, the system cannot send a notification, and the Notify check box is read-only.)
	Note. The setting for the Notify check box does not get saved. Each time you access this page, the check box setting gets set based on the applicant's preferred contact method.

Status	
Status	Job offer statuses are configured in the Statuses and Reasons page. Oracle delivers a complete set of statuses and recommends that you use these delivered values.
	Although you can manually select an offer status (except during approval processing), generally you can let the system set the value based on the actions you perform. For example, if you use the delivered statuses and you require approval for job offers, the default value for a new offer is <i>Pending Approval</i> . If offer approval is not required, the default value is <i>Extend</i> .
	The delivered offer statuses are:
	• Draft
	Pending Approval
	• Denied
	• Extend
	• Accept
	Acceptance Withdrawn
	• Hold
	Offer Rejected
	• Offer Withdrawn
Reason	If your organization has set up reasons for a particular status, you can select a reason for putting the offer in a status. For example, reasons for the <i>Offer Rejected</i> status might include <i>Salary,Benefits</i> , or <i>Personal</i> .
	When a job offer's status code changes, the presence of identical reason codes causes the system to bring in a default reason code for the new status. For example, suppose the Draft and Pending statuses both have a reason code 100. The descriptions might be different, but the code itself is the same for both. If an offer in Draft status has reason code 100, then when it goes into Pending status, the system assigns the Pending reason code 100. If the Pending status doesn't have a reason code 100, then when the offer goes into Pending status, the Reason Code field will display <i>Invalid Value</i> .
	See <u>Chapter 4, "Setting Up Recruiting Statuses," Defining Statuses and</u> <u>Reasons Codes, page 50.</u>

Offer Letter

Use this group box to create an offer letter.

See Chapter 22, "Managing Applicants," Sending Correspondence and Recruitment Letters, page 635.

Letter	Select a letter to send to the applicant. Talent Acquisition Manager delivers two templates: <i>HRS_OFF_LETTER_OF1</i> and <i>HRS_OFF_LETTER_OF2</i> .
Date Printed	Displays the date that you printed the offer letter. The system populates the field when you click the Generate Letter link or when the offer letter is generated by the HRS Letter Generation process .
Generate Letter	This link is available only if the offer status equals <i>Extend</i> , the offer has been submitted, and a letter has not been generated.
	Click this link to generate the letter immediately. The system opens the generated letter in a new browser window, where you can print it or save it locally. Once the letter is generated, the Generate Letter link is no longer available and the letter is removed from the HRS Letter Generation process. To make the link available again, clear the date in the Date Printed field.
	When you generate a letter, the system creates a contact note entry on the Manage Applicant - Contact Notes page. The letter is an attachment to the note.
	If you subsequently click the Email Applicant link, the system automatically attaches the generated letter to the email.
Email Applicant	Click this link to display the Send Correspondence page, where you can send the applicant email. If you have generated or uploaded an offer letter, the Attachments grid on the Send Correspondence page includes the offer letter (although you can remove or replace it if you wish).
	After accessing the Send Correspondence page, enter the email subject and message, then send it to the applicant. When you send the email, the system creates a contact note on the Manage Applicant - Contact Notes page; the email attachments are saved as note attachments.
Upload Letter	Click this link to upload a saved letter as an attachment. Most commonly, you use this link to upload a modified version of the original generated letter. However, it is not necessary to generate a letter before uploading one.
	Uploading a letter does not remove the original generated letter from the attachments grid, but you can remove the original letter manually if necessary.
	When you upload a letter, the system creates a contact note entry on the Manage Applicant - Contact Notes page. The letter is an attachment to the note.
	If you subsequently click the Email Applicant link, the system automatically attaches the modified letter (rather than the original) to the email.

Recommended Salary Range

Expand this section, which is initially collapsed, to see the salary range associated with the job opening.

Job Offer Components

The compensation package for an offer is made up of one or more job offer components. Every offer must include at least one offer component.

Component	Select an offer component.
Offer Amount	Enter an amount. The system warns you if the amount is above or below the recommended salary range.
Currency	Select the currency. The currency defaults to currency associated with the component.
Frequency	Select a pay frequency. The frequency defaults to the frequency associated with the component.

Attachments

This section appears only if the system is configured to allow online job offers for this job opening's regulatory region. Use this section to manage the three kinds of job offer attachments: file attachments, links, and notes. If you post a job offer on Candidate Gateway, the applicant will see all of the attachments that you include here.

Job Offer Documents	The grid under this tab shows the file attachments for the job offer.
	The systems creates rows for any offer letters that you generate or upload on this page. Offer letters that the HRS Letter Generation process creates do not get added to the grid.
	In the grid, the editable Document Description column and the non-editable Attached File column display identifying information for the document. The default description for offer letters is <i>Offer Letter</i> .
Related Links	The grid under this tab shows links that you attach to this job offer. Links are always organizational-level attachments.
	In the grid, the editable Link Description column and the non-editable URL column display identifying information for the link.
Notes	The grid under this tab shows notes that you attach to this job offer. Notes are always organizational-level attachments.
	In the grid, the editable Note Description column displays identifying information for the note.
Action Required	Select this check box for any job offer documents or links that the applicant must complete and return if the offer is accepted. In Candidate Gateway, an icon appears next to these documents, along with instructions to review the marked documents.
	This check box does not appear in the Notes grid.

er is dit Offer	
lable.	
ttachment	
ile to	
 editable. When you access an existing offer, you must click the Edit button to make the Delete icon appear in the attachment grids. Select the type of attachment to add to the job offer: An <i>Application Specific Document</i> is specific to this offer. An <i>Organizational Level Document</i> is a general purpose file attachment, link, or note that your organization has made available. 	

Comments

Enter any comments that help explain the reasons behind the job offer details. Offer comments are only visible on the Prepare Job Offer page.

Action Buttons	
Save for Later	Saves the job offer and sets the status to Draft.
Submit	Saves the job offer and sets the status to <i>Pending Approval</i> if approval is required or sets the status to <i>Extend</i> if approval is not required.
	If approval is required, the page refreshes with a new title, Disposition Detail, the approval path, and links for Offer Details and Approvals.
	If the offer that you are submitting brings the total number of offers and hires over the number of target openings for a standard requisition, the system displays a warning. You can submit the offer anyway, but doing so can cause problems. The best practice is to promptly record rejected and withdrawn offers to avoid having too many offers active at once.
	See Chapter 19, "Making Job Offers," Approving Job Offers, page 545.

Post	This button appears only if the system is configured to allow online job offers for this job opening's regulatory region. Click this button to access the Post Online Job Offer page, where you complete the process of posting the job offer to Candidate Gateway. If the applicant is an external applicant who has not registered in Candidate Gateway, you will not be able to post the offer.
Add Revised Offer	This button is available if the offer has a status of <i>Rejected</i> . Click this button to add new job offer when the previous offer was rejected.
Unpost	This button appears only if the system is configured to allow online job offers for this job opening's regulatory region and the applicant is a registered Candidate Gateway user.
	Click this button to remove a posted offer from Candidate Gateway. You might unpost job offers if they have been withdrawn or modified.
Delete Offer	Users with Recruiting Administrator privileges on the Recruiting Row Level Security page can click this button to delete the offer. If the job offer has been posted to Candidate Gateway, deleting the offer also removes the posted offer.
Cancel and Return to Previous Page	Click the Cancel button to reverse any unsaved changes on the page without leaving the page.
	Click he Return to Previous Page link to reverse any unsaved changes and return to the page from which you accessed the job offer.
Edit Offer	When you initially access this page for an existing offer (in which case the name is Disposition Details: Offer), the offer is not editable. Click this button to make the fields on the page editable.
	When you modify a job offer, saving the changes does not update any online offer that has been posted to Candidate Gateway. Instead, you must unpost the offer and then repost it. If the posted offer has already been accepted, you will not be able to make material changes to the offer, but you can add additional attachments and add them to the online offer.

Disposition History

This grid displays the applicant's status change history for routings, interviews, and offers. These three recruiting areas have their own sets of statuses, separate from the applicant's overall disposition. For example, the delivered statuses for offers are the values that you select in the Status field on this page.

The first column in the grid displays the status type: *Route, Interview,* or *Offer*. Clicking the link changes the page to the Disposition Details page for the indicated recruiting area.

See Chapter 22, "Managing Applicants," Reviewing Disposition Details, page 615.

Attaching Organizational Level Documents

Access the Organizational Level Documents page (in the Attachments section of the Prepare Job Offer page, select *Organizational Level Document* in the Source field and then click the Add Attachment link).

Orgar	nizational Level Document			
informa types, t		een saved to the	Document Definition' a new page will prompt for the Attachn database when you are returned back to this page. For all (I Documents'.	
Select	View Attachment	Туре	Attached File	Last Update Date/Time
	Blue Telekom Group Med Aid App	Attachment	Blue_Telecom_Group_Medical_Aid_Application.doc	10/02/2008 11:04:05AM
	Proof of Citizenship Form	Attachment	Proof_of_Citizenship.doc	10/02/2008 11:03:37AM
Select / Attach	All Deselect All Selected Documents			
Job O	ffer Document Definition Attachment Choice	es		
De	scription			
O Di	rug Testing Requirements			
O Jo	b Offer Notes			
Attach	Document Definition			
0	<			

Organizational Level Documents page

Job Offer Attachment Choices

This grid lists the organizational attachments and URLs that are valid for the job opening. For example, certain attachments might be valid for some business units but not others.

Select and Attach Selected Documents	Select one or more documents that you want to attach to the job offer, then click the Attach Selected Documents button. The documents are attached to the job offer immediately, but you remain on the current page until you click the OK button to return to the Prepare Job Offer page.		
	Note. The page does not indicate which attachments, if any, you have already attached to the document. If you accidentally add the same document multiple times, you can delete it from the job offer when you return to the Prepare Job Offer page.		

Job Offer Document Definition Attachment Choices

This grid lists placeholders for specific types of documents that you can add to the offer.

Attach Document DefinitionSelect one of the document types that appear in the grid, then click the
Attach Document Definition button to access the Existing Document
Definitions page, where you can either select and attach preexisting
attachments of this type or you can create a new one. Different types of
documents support different combinations of attachment type (file
attachment, URL, and note).When you attach a document from the Existing Document Definitions page
when you attach a document from the Existing Document Definitions page
when you attach a document from the Existing Document Definitions page
when you attach a document from the Existing Document Definitions page
when you attach a document from the Existing Document Definitions page
when you attach a document from the Existing Document Definitions page
when you attach a document from the Existing Document Definitions page
when you attach a document from the Existing Document Definitions page
when you attach page
you page
you page
when you attach page
you page
you

When you attach a document from the Existing Document Definitions page, the system attaches the document immediately.

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring Attachments.

Posting Job Offers to Candidate Gateway

Access the Post Online Job Offer page (click the Post button on the Prepare Job Offer page).

Post Online Job	Offer
Review and Submit posting Cancel to return to the offer	for this online job offer if the information is correct. To make changes, select page and edit the offer.
Submit	Cancel
Offer	
Offer Details	
Applicant Name:	Adrian Goldstein
Applicant ID:	300114
Job Opening:	300111 Event Coordinator
Offer Date:	02/16/2009
Commencement Date:	
*Offer Expiration Date:	02/26/2009
Job Offer Components	
Component	Offer Amount Currency Frequency
Base Salary	2700.00 🛒 USD 🔽 Monthly

Post Online Job Offer page (1 of 2)

Status			
Status: 010 Extend	Y		
Reason:	v		
Attachments			
Job Offer Documents Relat	ted Links Notes		
Document Description	Attached File	Action Required	View
Offer Letter	2009-02-16-09.16.56.0000001011HRS_OFF	\checkmark	2 -
Proof of Citizenship Form	Proof_of_Citizenship.doc	Γ	2
	Previous Comment	Next Corr	nment

Post Online Job Offer page (2 of 2)

Review the offer details on this page, then click the Submit button to post the offer.

When the offer is posted, the system generates a notification that appears on the applicant's Candidate Gateway Welcome page, sends an email to notify the applicant of the job offer, and creates a contact note.

You cannot post online job offers for applicants who have not provided an email address.

Approving Job Offers

This section provides an overview of job offer approvals, lists prerequisites, and discusses how to:

- View pending approvals.
- Approve job offers.
- Add another approver or reviewer.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Approvals"

Understanding Job Offer Approvals

This overview discusses the job offer approval process.

Approval Process Activation

To use the approval process for job offers, select the Job Offers check box in the Approvals Required group box on the Recruiting Installation - General page.

If your organization requires works council approval when the offer is for a job that is associated with a works council, also select the Optional Works Council check box in the Approvals Required group box on the Recruiting Installation - General page.

Approval Statuses

This section refers to specific offer statuses that are applied during approval processing. These references assume that you are using the delivered status configuration for offers.

If you have changed this configuration, the system uses the statuses that you have defined for each stage of the approval process.

See Chapter 4, "Setting Up Recruiting Statuses," Recruiting Status Setup, page 36.

Approver Actions

Each approver can take action on the request on the Disposition Details: Offer page, which they can access by using the link in the email notification that they receive or through the Pending Approvals component. Approvers can also add additional approvers or reviewers to an individual job offer by clicking on the Insert Approver icon on the Manage Applicants - Disposition Details page and entering information for the additional approver or reviewer on the Insert additional approver or reviewer page.

Approvers have the option of either:

- Approving the job offer.
- Denying the job offer.

The system sets the job offer status to *Denied*, stops the progress of the job offer, and notifies the hiring manager.

• Pushing back the job offer.

The system notifies the previous approver that the job offer has been pushed back and needs his or her attention.

Note. The first approver cannot push back the job offer.

Approvers in the Delivered Approval Process

PeopleSoft software delivers a default approval process for job offers. This process includes up to three approvers:

1. The first approver is the primary hiring manager's supervisor.

To identify the supervisor of the hiring manager, the system uses the Target Information page.

If the job offer is not associated with a job opening, you can specify a hiring manager on the Prepare Job Offer page when you create the job offer. If there is no hiring manager, then the first approval step is skipped. If the primary hiring manager's supervisor is inactive, the first approver is the supervisor of the inactive employee.

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Working with Self-Service Transactions," Setting Up Access to Direct Reports Data.

2. The second approver is the recruiter or recruiters entered on the Job Opening or Prepare Job Offer page.

When multiple recruiters are specified, only one recruiter must approve the job offer.

If the job offer is not associated with a job opening, you can enter the recruiter on the Prepare Job Offer page when you create the job offer. If you do not specify a recruiter, the system routes the approval request to the recruiting solutions approval administrator.

3. If works council approvals are activated on the Recruiting Installations - General page, and if the job opening is associated with a works council ID, then the works council spokesperson is the third and final approver.

The works council spokesperson is specified in the Spokesperson field on the Works Council Table page.

See PeopleSoft HR 9.1 PeopleBook: Manage Labor Administration, "Setting Up Works Councils."

If there isn't a works council ID tied to the job offer, or if there is no one entered in theSpokesperson field, the system skips this approval step.

Note. You can modify this delivered approval process to fit your organization's business needs.

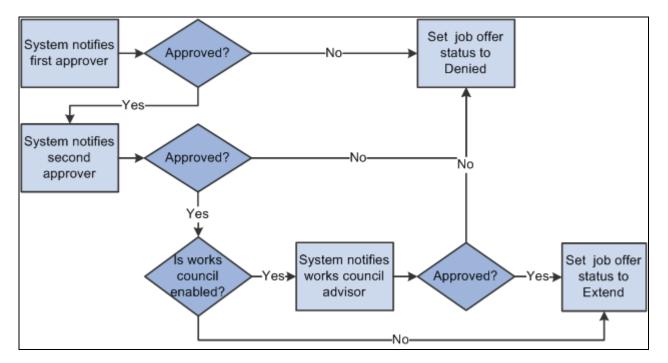
Approval Processing

When offer approvals are active, submitting an offer sets the job offer status to *Pending Approval*. At this point, the Disposition Details: Offer page includes an Approvals link that users can click to see the entire approval chain.

If any approver denies the offer, then the offer status changes to *Denied*. Otherwise, the offer remains in *Pending Approval* status until all approvals are complete, at which point the offer status changes to *Extend*.

Changes to the offer status can also trigger changes to other statuses. If you use the delivered status change effects, when the offer status changes to *Extend*, the applicant's disposition changes to *Offer*.

The following diagram illustrates the delivered approval process, which includes three approvers when works council approval is needed and two approvers otherwise. As shown in the diagram, the process starts when the system sends the first approver a notification at the time the offer is submitted. As each approver approves the offer, the system sends notifications to the next approver.



Delivered job offer approval process with three approvers.

Job Offer Changes

During the approval process, an approver can change information on the job offer itself. If certain fields are changed that might require the job offer to be evaluated again, a trigger is created and the system sends a notification back to the first approver to start the approval process over. The fields that can cause a trigger to occur are:

- Offer Component
- Offer Amount
- Offer Currency
- Offer Frequency

Approval Delegation

If you enable delegation for job offer approval, approvers can delegate approval authority to proxies for specified amounts of time. The system gives the proxy access to the Pending Approvals component, which displays the job openings for which approval has been delegated.

See Also

Chapter 12, "Understanding Approval Delegation in Talent Acquisition Manager," page 223

Prerequisites

To use the works council step in the job offer approval process, you must:

1. Set up works council IDs.

See PeopleSoft HR 9.1 PeopleBook: Manage Labor Administration, "Setting Up Works Councils."

2. Select the Optional Works Council option on the Recruiting Installation - General page.

See <u>Chapter 2</u>, "Defining Installation Options for Recruiting," Defining General Settings for Templates, Approvals, and Integrations, page 11.

3. Add the Works Council Information section to job opening templates.

See Chapter 9, "Setting Up Recruiting Templates," Setting Up Job Opening Templates, page 150.

4. Add a works council ID to job opening or job offer.

See Chapter 13, "Creating Job Openings," Entering Basic Job Information, page 254.

See Chapter 19, "Making Job Offers," Creating a Job Offer, page 533.

Page Name	Definition Name	Navigation	Usage
Pending Approvals	HRS_RECRUIT_CONSOL	Recruiting, Pending Approvals, Pending Approvals	View pending approvals and approve job offers.
Manage Applicant - Disposition Details	HRS_APP_RCMNT	Click the subject link on the Pending Approvals page.	Approve, deny, or push back a job offer.
Insert additional approver or reviewer	NA	 Click the Insert Approver icon on the Job Opening - Job Approvals page. Click the Insert Approver icon on the Manage Applicant - Disposition Details page. 	Add approvers or reviewers to the approval process.

Pages Used to Approve Job Offers

Viewing and Approving Pending Approvals

Access the Pending Approvals page (Recruiting, Pending Approvals, Pending Approvals).

Pe	Pending Approvals				
Per	Pending Approvals Customize View All Tirst I 1-6 of 6 Last				
	ID Nbr	Sender	Received	Subject	
	300162	Ponciano Batalang	05/20/2009	Job Approval:Guest Manager	
	300170	Ponciano Batalang	06/24/2009	Job Approval:Client Service Manager (Core)	
	300171	Ponciano Batalang	06/24/2009	Job Approval:Manager Trainee (Core)	
	300172	Ponciano Batalang	06/24/2009	Job Approval:Public Relations Manager (Core)	
	10261	Betty Locherty	05/20/2009	Offer Approval:Elfrieda Penner	
	503711	Betty Locherty	08/18/2009	Offer Approval:Oona Marcel	

Pending Approvals page

Select the check box next to approval that you wish to approve or deny. Select either *Approve* or *Deny* from the Select box and click Go.

Approving Job Offers

Access the Manage Applicant - Disposition Details page (click the subject link for a job offer approval on the Pending Approvals page).

On the Manage Applicant - Disposition Details page, click the Approvals link to display approval information.

Manage Applicant: Ramilio Estavias					
Disposition D	Details: Offer				
-					
Applicant Name:	Ramilio Estavias		Date Entered:	08/06/2009	
ID:	500007				
			🗃 <u>Print Job Op</u>	ening	
Posting Title: Bring Your Arbitration Ex Labor Relations		xperience to	Job Opening ID:	503708	
Job Opening Status:	010 Open		Job Type:	Standard	
Job Title:	Manager-Employee Re	lations	Job Code:	600060	
Position Number:	19000025 Manager-E	mployee Rela	tions		
Business Unit:	GBIBU Global Busin	ess Institute E	30		
Job Family:	KADMIN Administrativ	/e Support			
Offer Details Approvals Supervisor/Recruiter Grp Aprv					
🗢 🛛 Job C	Offer:Pending		Request Inform	ation	
Route to Supe	ervisor/Recruiter				
Approved Pending ✓ Test User: HCQAN-MSPVR Hiring Manager Posn Supervisor ① Test User: HCQAN-R 01/16/12 - 1:25 PM ● ①					
Submit Approve Pushback Deny					
Comments Text:					
 Disposition History 					
Disposition	Status	Reason	Status Date	Offer ID	
Offer	006 Pending Approval		01/16/2012	1127	
Interview	005 Interview		08/06/2009		

Disposition Details: Offer page – Approvals section

Note. The Approvals link appears on the Disposition Details: Offer page only after the offer is submitted for approval.

Job Offer: < Approval Status>

This group box displays a graphical representation of the approval process. There is a box for each approver. The box title shows the approver's status, while the box contents include the approver's name, the approver's role in the approval process (for example, the hiring manager's supervisor), and the date, if any, when the approver took action on the approval request.

Additional graphical elements in this group box include color-coding the approver boxes according to the approver's status, and status icons next to the approver's user ID.

<approver id="" user=""></approver>	Click the approver's user ID to display additional information about the approver.
+	Click to add another approver or reviewer. A secondary page appears, where you select a user ID and indicate whether you are adding an <i>Approver</i> or <i>Reviewer</i> .
Submit	Click to save any changes to the job offer.

Approval Controls for Assigned Approvers

The following buttons are visible only to the current approver.

Approve	Click to approve the job offer. When final approval is reached the system changes the job offer status from <i>Pending Approval</i> to <i>Extend</i> .
Pushback	This is available only to approvers other than the first approver. Click to send a notification to the previous approver telling them the job offer needs to be changed.
Deny	Click to reject the job offer and set the job offer status to Denied.

Approval Control for Administrators

StatusWhen an administrator views the approval chain, the buttons that the
assigned approvers use are not visible. Instead, there is a Status drop-down
list box that the approver can use to override the approval process. The
administrator can select either *Extend* or *Denied*. The override takes effect
when the administrator submits the job offer.After an administrator overrides the approval process, the approval process

After an administrator overrides the approval process, the approval process status is *Terminated*, regardless of whether the administrator approved or denied the job opening.

Adding Another Approver or Reviewer

Access the Insert additional approver or reviewer page (click the Insert Approver icon on the Job Opening - Job Approvals page or the Manage Applicant - Disposition Details page).

See Chapter 13, "Creating Job Openings," Adding Another Approver or Reviewer, page 329.

Editing or Deleting Job Offers

This section discusses how to edit or delete job offers.

Pages Used to Edit or Delete Job Offers

Page Name	Definition Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search for and select applicants.
Disposition Details: Offer	HRS_APP_RCMNT	For an applicant with the disposition <i>Offer</i> , click the disposition link next to the applicant name in the Results group box on the Find Applicants page.	Edit or delete the job offer. Note. User must first click the Edit Offer button to edit the offer.

Editing or Deleting Job Offers

Access the Disposition Details: Offer page (For an applicant with the disposition *Offer*, click the disposition link next to the applicant name in the Results group box on the Find Applicants page).

The information that appears is the same as when you created the job offer. Update any relevant details of the job offer.

See Chapter 19, "Making Job Offers," Creating Job Offers, page 529.

Note. If the job offer has been posted to Candidate Gateway, you must unpost it before editing or deleting it.

Chapter 20

Hiring Applicants

This chapter discusses how to:

- Complete pre-employment checks.
- Create applicant contracts.
- (AUS) Create salary packages.
- Hire applicants.
- (AUS) Copy salary packages to human resources.

Completing Pre-Employment Checks

This section provides an overview of pre-employment checks, lists a prerequisite, and discusses how to submit pre-employment check requests.

Understanding Pre-Employment Checks

Some organizations may use third-party vendors to perform pre-employment checks on applicants. When your organization sets up an agreement with a pre-employment check vendor, you nominate a recruiting administrator or recruiter as the HR manager for your organization. The HR manager has access to the administration functions to define the privileges of other users with access to the pre-employment vendor.

Prerequisite

Before you can request pre-employment checks, you must set up a vendor that performs pre-employment checks.

See Chapter 10, "Setting Up Third Party Integrations," page 177.

Page Name	Definition Name	Navigation	Usage
Pre-employment Check	HRS_PREEMPL_H	Recruiting, Find Applicants, Find Applicants	Submit pre-employment check requests.
		Click the applicant name link on the Find Applicants page.	
		On the Manage Applicant page, select <i>Pre-</i> <i>Employment</i> from the Take Action field and click the Go button.	
		The <i>Pre-Employment</i> value is available only if the system is set up to integrate with a third-party vendor that performs pre- employment checks.	
Pre-employment Check Details	HRS_PREEMPL_D	Click the Details link in the Screening Inquiries group box on the Pre-employment Check page.	Review pre-employment check details.

Pages Used to Complete Pre-Employment Checks

Submitting Pre-Employment Check Requests

Access the Pre-employment Check page (on the Manage Applicant page, select *Pre-Employment* from the Take Action field and click the Go button).

Manage Applicant: John Lund						
Pre-emp	loym	ent Cheo	ck			
Name: Applicant ID:	John 34	Lund	A	pplicant Type:	Exter	mal Applicant
Contact:	EMail	I	S	tatus:	040	A
Phone:	360/2	222-3446		ddress:		Active ike Street
Email:	Address.			Seattle, WA 98330		
Background Scr	eening I	Provider:	ireRight, Inc		•	Request New Inquiry
Screening Inqu	iries			<u>Customize </u>	Find 🖉	🛯 🛗 First 🗹 1 of 1 🕨 Last
Provider		Request ID	Request Date	Status	A	djudication Status
HireRight, Inc			08/20/2009	Request Failed	N	lot Displayed
						Return to Previous Page

Pre-employment Check page

Background Screening Provider	Select the provider that is to perform the background check.
Request New Inquiry	Click to submit the request. The system sends a message to the vendor.

Screening Inquiries

This group box displays the summary information and status of the background check.

Adjudication Status	Displays the status of the adjudication, if you have enabled it on the Open Integration Framework - Pre-Employment Vendor Setup page.		
	See <u>Chapter 10, "Setting Up Third Party Integrations," Defining Settings</u> for Pre-Employment Vendors, page 184.		
Details	Click to access the Pre-employment Check Details page, where you can review status information for the pre-employment checks.		

Creating Applicant Contracts

This section provides an overview of applicant contracts, lists prerequisites, and discusses how to:

- Define basic contract information.
- Define contract clause information.
- Define the signature date and probation information.

Understanding Applicant Contracts

If your organization uses employment contracts, you can use Talent Acquisition Manager to create applicant contracts and link them to an applicant during the prepare for hire process. If the employee is hired, this information is copied to the human resources database.

Prerequisites

Before you create an applicant contract, you must:

- Set up contract types.
- Set up contract clauses.
- Set up contract templates.

See *PeopleSoft HR 9.1 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Tracking Workforce Contracts.

Pages Used to Manage Applicant Contracts

Page Name	Definition Name	Navigation	Usage
Contract Status/Content	HRS_APP_CNTRCT1	Recruiting, Find Applicant Click the name link in the Search Results group box on the Find Applicants page. On the Manage Applicant page, select <i>Manage</i> <i>Applicant Contract</i> in the Take Action field.	Define basic contract information.

Page Name	Definition Name	Navigation	Usage
Contract Clause	HRS_APP_CNTRCT2	Select <i>Manage Applicant</i> <i>Contract</i> in the Take Action field on the Manage Applicant page. Select Contract Clause page.	Define contract clause information.
Signature Date/Probation Info (signature date/probation information)	HRS_APP_CNTRCT3	Select Manage Applicant Contract in the Take Action field on the Manage Applicant page. Select the Signature Date/Probation Info page.	Define the signature date and probation information.

Defining Basic Contract Information

Access the Contract Status/Content page (on the Manage Applicant page, select *Manage Applicant Contracts* in the Take Action field).

Contract Status/Content Contract Clause Signature	Date/Probation Info
Applicant Name: Bill Smith Applicant Type: External Applicant	Applicant ID: 78 Empl ID:
Applicant Information	<u>Find</u> View All First 🚺 1 of 1 🗈 Last
*Contract Number: 0001	*Contract Status: Active 💌 🛨 🖃
Contract Begin Date: 08/19/2009	Contract Expected End Date:
Contract End Date:	*Regulatory Region: USA
Additional Contract	Contract Template ID:
□ More than one year expected	Initialize Contract
Comment:	
Comment:	<u>ه</u>]

Contract Status/Content page (1 of 2)

🔻 💴 Spain			
Probation/Vacation Info			
Probation Period: Mont	hs 💌	Vacation Period: Months	
Other Information			
Begin/End Week:	Monday	✓ /: Friday ✓	
Compensation Rate Description:			
Hiring Center:			
Scheme ID:			
Social Security Contribution:	Q		
Save Return to Previous Pa	<u>qe</u>		

Contract Status/Content page (2 of 2)

Applicant Information

Contract Number	Enter the contract number. The system automatically generates a number for you that you can change.
Contract Status	Indicate whether the contract is Active or Inactive.
Contract Begin Date	Enter the date when the contract begins. The current date is the default.
Contract Expected End Date	Enter the date when you expect the contract will end.
Contract End Date	Enter the date when the contract actually ended. This may differ from the date that you expect the contract to end.
Regulatory Region	Select a regulatory region.
Additional Contract	Select this check box if the worker already has at least one contract. deselect this option if this is the workers only contract.
More than one year expected	Select this check box if you expect that this contract will result in more than one year of employment for this worker.
	Note. This check box is required for contracts with Japanese workers.
Comment	Enter a comment. This comment is used only for informational purposes.
Comment	Enter a comment. This comment is used only for informational purposes.

(ESP) Spain	
Probation Period	If this worker's contract includes a probation period, use these two fields to specify how long it will be. Use the first field to enter the appropriate quantity and the second field to select a unit of time. Units of time are <i>none</i> , <i>Days</i> , <i>Months</i> , or <i>Years</i> . For example, if the probation period is six months, enter 6 in the first field, then select <i>Months</i> in the second field.
Vacation Period	Use these two fields to specify how much vacation the worker receives per year. Use the first field to enter the appropriate quantity and the second field to select a unit of time. Units of time are <i>none,Months,Natrl Days</i> (natural days), <i>Weeks</i> , or <i>Work Days</i> . For example, if the vacation period is 20 work days, enter 20 in the first field, then select <i>Work Days</i> from the options in the second field.
Begin/End Week	Specify the days when the worker's work week begins and ends. The default values are <i>Monday</i> and <i>Friday</i> .
Compensation Rate Description	Enter a free-form description of the worker's compensation rate.
Hiring Center	Select the hiring center responsible for hiring this person.
Scheme ID	Select a scheme ID.
Social Security Contribution	Select a social security contribution ID for the contract and scheme ID selected. The system uses both the scheme ID and the contribution ID for social security calculations, to determine the percentage or fixed amount that is applied to the calculation of a worker's contribution.

Defining Contract Clause Information

Access the Contract Clause page (on the Manage Applicant page, select *Manage Applicant Contract* in the Take Action field).

Contract Status/Content	Contract Clause	Signature Date	/Probation Info			
Applicant Name: Bill S Applicant Type: Exter	mith nal Applicant		Applicant ID: Empl ID:	78		
Applicant Information				<u>Find</u> View All F	irst 🚺 1 of	1 🖸 Last
Contract Number: Contract Type:	0001	Begin Date:	08/19/2009	Contract Status:	Active	+ -
Taly	Extend Contract					
Plan ID:	~					
Reason:	•					
Contract Clause				Find View All First		Last
Contract Seq Nbr	Clause			Clause Status		+ -
Long Description:						
Comment:						<u>[</u> 7]
Save <u>Return</u>	to Previous Page					

Contract Clause page

Application Information

Contract Type	This is a required field that identifies the contract type for this template from the contract types that you have set up on the Contract Type Table page.
Extend Contract	Select this check box if the contract can be extended.
(ITL) Italy	
Plan ID	If the worker was assigned a contract type of <i>Training and Labor</i> , you must select a plan ID.
Reason	If the worker was assigned a contract type of <i>Determined Period</i> contract, you must enter a reason for the contract.

Contract Seq# (contract sequence number)	When you add a clause to the contract, the system assigns a sequence number automatically.
Clause	Select a clause.
Clause Status	Defaults to the status that is associated with the clause that you selected.
Long Description	Enter a description. This description is used only for informational purposes.
Comment	Enter a comment. This comment is used only for informational purposes.

Contract Clause

Defining the Signature Date and Probation Information

Access the Signature Date/Probation Info page (on the Manage Applicant page, select *Manage Applicant Contract* in the Take Action field).

Contract Status/Content Contract Claus	se Signature Date	e/Probation Info		
Applicant Name: Bill Smith Applicant Type: External Applicant		Applicant ID: Empl ID:	78	
Applicant Information			<u>Find</u> View All First K 1 of	1 🗈 Last
Contract Number: 0001	Begin Date:	08/19/2009	Contract Status: Active	+ -
Signature Date:	Maximum Hours:	144.00	Minimum Hours:	
Responsible ID:				
Probation Info				
Probation Date:	Reason:			
Save Return to Previous Page				

Signature Date/Probation Info page

Applicant Information

Signature Date	Enter the contract's signature date. This information is required in some European countries, including Germany.
Maximum Hours and Minimum Hours	Enter the maximum and minimum contract hours. These values default from the values that you indicate on the Installation table for this contract.

Responsible ID	Enter the company agent who drafted the contract and who is responsible for its language.
Probation Info	
Probation Date	Enter multiple probation dates if they are required for this worker. The probation date that you enter here also appears on the job data record for this worker.
Reason	Select a probation reason, including <i>New Date</i> and <i>Un-perform</i> (indicating additional probation time for failure to perform within expectations for the position).

(AUS) Creating Salary Packages

This section provides an overview of salary packages.

Understanding Salary Packages

Salary package modelling enables you to explore different package scenarios to find satisfactory solutions and alternatives for applicant salary packages. You can save and report on any number of package variations during the modelling process.

You can create a salary package at any point in the recruiting process. When modelling salary packages for applicants, combine any number or type of components into a package to suit both the organization and applicant.

Creating salary packages for applicants is discussed in the *PeopleSoft HR PeopleBook: Administer Salary Packaging*.

See *PeopleSoft HR 9.1 PeopleBook: Administer Salary Packaging*, "Modelling Salary Packages," Pages Used to Model Salary Packages for Applicants.

Hiring Applicants

This section provides an overview of hiring applicants and discusses how to:

- Record an accepted offer.
- Prepare for hire.
- Review Search/Match results.
- Withdraw a hire request.

Understanding Hiring Applicants

This section provides an overview of the hiring process.

Offer Acceptance

Before the system will allow you to submit an applicant for hire, you need to record that the offer has been accepted. There are two ways that an applicant's offer acceptance is recorded:

• If the offer was posted to Candidate Gateway, the applicant can accept (or reject) the offer there.

See *PeopleSoft Candidate Gateway 9.1 PeopleBook*, "Using Candidate Gateway," Reviewing and Responding to Online Job Offers.

• If a recruiting user records the offer acceptance, the user access the offer details on the Disposition Details: Offer page and changes the offer status there.

See Chapter 20, "Hiring Applicants," Recording an Accepted Offer, page 569.

In both situations, the system updates the offer status, which in turn triggers additional status changes. For example, if you use the delivered statuses and status change effects, then when you change the offer status to 020 Accept, the applicant's disposition for the current job opening changes to 071 Offer Accepted and the applicant's disposition for any other job openings changes to 100 Hold.

Note. To record that an offer has been accepted, update the offer status. Do not update the disposition; the system's automated status change effects will do that for you.

See Chapter 4, "Setting Up Recruiting Statuses," Understanding Recruiting Statuses, page 35.

Prepare for Hire

The actual hiring process takes place in the HR system. In the recruiting system, you prepare the applicant for hire by using the Prepare for Hire page to verify job opening data and submit the hiring request to HR.

The Prepare for Hire page shows the job code or position that is tied to the job opening. If the applicant is not linked to a job opening, or if the job opening is a continuous job opening that doesn't have position or job code information, the system gets position and job code information from the job offer. If the job offer doesn't have position or job code information either, then you must enter at least a job code on the Prepare for Hire page.

Note. If you use full position management, then a position number is required for the job offer and when preparing to hire. If you use partial position management, then the job offer can be submitted without position or job code information, but a job code is required before you submit the applicant for hiring.

When you complete the Prepare for Hire page, you also enter the start date and hire type.

Employee ID Verification

Depending on whether the Employee ID Verification field on the Recruiting Installation - Applicants page is set to *Required* or *Optional*, you may be required to verify the employee ID before you submit the hire request to HR.

The Employee ID verification process enables you to check whether the applicant is already in the human resources database. You check by searching the database for personal data that matches the applicant's data.

PeopleSoft delivers two search rules that you can use when verifying the employee ID:

- Search Rule A (Search Order = 10): First Name, Last Name, National ID, Date of Birth are required.
- Search Rule B (Search Order = 10): First Name, Last Name are required.

See Chapter 2, "Defining Installation Options for Recruiting," Defining Applicant-Related Settings, page 18.

Hire Processing

When you submit the hire request, the system sets the disposition to *Ready to Hire* and sends a notification to the HR administrator. The applicant's name appears in the Manage Hire Results group box on the Manage Hires page. Applicant data is transferred to the HR database based on criteria defined on the Data Transfer to HR (HRS_MNG_HIR_STP) component.

After the applicant is hired in the Human Resources pages, the system:

- Sends the recruiter a notification that applicant was hired.
- Updates statuses as follows:
 - Sets the applicant's disposition with regards to the job opening to *Hired*, and also sets the overall applicant status to *Hired*.
 - Sets the job opening status to *Closed* if the Available Openings is zero.
 - Sets all other dispositions for other job openings for this applicant to Reject.
 - Sets the disposition for other applicants linked to this job opening to *Reject* if the available openings is zero.
- Updates the applicant record with the employee ID.
- Copies applicant data to human resources records.

The specific data elements that are transferred depend on the settings in the Manage Hire Setup page.

• Copies the contract information to human resource records.

Note. This list assumes that you use the delivered status change effects.

See Chapter 4, "Setting Up Recruiting Statuses," Understanding Recruiting Statuses, page 35.

The Withdraw From Hire Action

The Manage Hires page in the human resources system does not permit users to cancel hire requests for recruiting applicants. If it is necessary to cancel a hire request for an applicant, the cancellation request must originate in the recruiting application.

To initiate a cancellation request, use the *Withdraw From Hire* action for an applicant. This action is available only when the disposition is *Ready to Hire* and the job opening, if any, is in an *Open* status.

The results of the request depend on what stage the hire process has reached in the human resources system:

- If the request status is *Requested* and the applicant has not been processed at all, then the request status changes to *Cancelled* and the applicant no longer appears in the Manage Hires page.
- If the applicant has been partially or completely processed, then the request status changes to *Action Required* and a message is added to the Hire Comments field to alert the HR administrator to the situation.

Normally the Manage Hires page does not show hiring requests after the hiring administrator has finished personal data and job data processing, but the request reappears in the Manage Hires page when the cancellation requests updates the status to *Action Required*.

Regardless of what happens to the hire request in the Manage Hires page, submitting a hire cancellation request changes the applicant's disposition to *Withdrawn*.

Note. Recruiting users do not receive any messages regarding activity in the human resources system.

It is not possible to use the Prepare for Hire action again after you have withdrawn the applicant from hire. Each application supports only one Prepare for Hire record, and after it has been submitted once, it is permanently read-only, making it impossible to resubmit.

See Also

Chapter 2, "Defining Installation Options for Recruiting," Setting Up Recruiting Installation Settings, page 10

Chapter 8, "Setting Up Additional Recruiting Definitions," Setting Up the Data Transfer to HR, page 125

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Search/Match"

PeopleSoft HR 9.1 PeopleBook: Administer Workforce, "Increasing the Workforce," Hiring Job Applicants

Prerequisites

Before you can hire applicants, complete the following tasks:

- 1. Configure the integration broker to transfer data between the recruiting system and the HR system.
 - a. The integration broker node must be set up and active.
 - b. The application server must have the pub/sub server running.
 - c. The HIRE_REQUEST, POST_HIRE_REQUEST, and WDRAW_HIRE_CONFIRM service operations, handlers, and routings must be active.

The HIRE_REQUEST message passes information to the HR_REQUEST record when you set the applicant's status to Ready to Hire.

The POST_HIRE_REQUEST message passes data from the human resources system back to the recruiting system after the hire is completed on the human resources side.

The WDRAW_HIRE_CONFIRM message passes the request to the human resources system when you withdraw an applicant from hire.

d. The HR_MNG_HIRES queue status must be set to Run.

2. Use the Manage Hire Setup page to define the data you want to transfer from the applicant's record to the employee record.

If there is no data that is being transferred to the employee record, then the *Prepare for Hire* and *Withdraw from Hire* actions are not available.

See Also

PeopleTools: Integration Broker PeopleBook

Chapter 8, "Setting Up Additional Recruiting Definitions," Setting Up the Data Transfer to HR, page 125

Pages	Used t	o Hire	Applicants
-------	--------	--------	------------

Page Name	Definition Name	Navigation	Usage
Find Applicants	HRS_REC_SCHAPP	Recruiting, Find Applicants, Find Applicants	Search for applicants.
Job Opening	HRS_JO_360	Recruiting, Find Job Openings, Find Job Openings	Perform various tasks related to job openings.
		Click a job name link on the Find Job Openings page.	
Disposition Details: Offer	HRS_APP_RCMNT	Click the Disposition link in the Search Results grid on the Find Applicants page or in the Manage Applicants grid on the Job Opening page	Review information about the applicant's current disposition, and update the disposition to show that the applicant has accepted your offer.
Prepare For Hire	HRS_PREP_FOR_HIRE	Select the <i>Prepare For Hire</i> action in the Take Action field on the Find Applicants page or in the Manage Applicants grid on the Job Opening page.	Review and complete job information and submit the hire request to the HR system.
		The <i>Prepare For Hire</i> action is available only for applicants whose disposition is <i>Offer</i> <i>Accepted</i> .	

Page Name	Definition Name	Navigation	Usage
Search Results	HCR_SM_RESULTS	 Click the Verify Employee ID link on the Prepare For Hire page. If the system enforces employee ID verification, the page appears when you click the Submit button on the Add Person of Interest page. 	Review Search/Match results to determine whether the applicant was a former employee, contingent worker, or person of interest.
Withdraw From Hire	HRS_ACT_APP_WDRAW	Select the Withdraw from Hire action in the Take Action field on the Job Opening page: Manage Applicants tab: View Applicants section. The Withdraw from Hire action is valid only for applicants whose disposition is Ready for Hire.	Confirm that a hire request is being withdrawn, and send a cancellation request to the human resources system.

Recording an Accepted Offer

Access the Disposition Details: Offer page (click the Disposition link in the Search Results grid on the Find Applicants page or in the Manage Applicants grid on the Job Opening page).

Note. The Disposition Details: Offer page is identical to the Prepare Job Offer page.

See Chapter 19, "Making Job Offers," Creating a Job Offer, page 533.

To record the offer acceptance:

- 1. Click the Edit Offer button.
- 2. If you use the delivered statuses, change the offer status to 020 Accept; otherwise, select the value that your organization uses to record accepted offers.

If your organization has established reasons that are associated with this status, you can optionally select a reason for the acceptance.

3. Click the Submit button.

The system updates the offer status, which triggers status change effects such as updating the applicant's disposition to 071 Offer Accepted.

See Also

Chapter 4, "Setting Up Recruiting Statuses," Understanding Recruiting Statuses, page 35

Preparing for Hire

Access the Prepare For Hire page (select the *Prepare For Hire* action in the Take Action field on the Find Applicants page or in the Manage Applicants grid on the Job Opening page).

Manage Applicant			
Prepare For Hire			
Manesh Bidar			
To initiate a hire, rehire, transfer, additional job assignment, or to add a contingent worker assignment, select Save and Submit Request to HR.			
Prepare For Hire			
Application Status:	071 Offer Accepted		
Status Last Updated:	05/18/2009		
Job Opening:	800013	Developer/Analyst	
Job Opening Type:	Standard Requisition		
Position:			
Job Code:	NF0009	Developer/Analyst	
Business Unit:	NFSBU	Federal Recruiting Solutions	
Department:	NF004	Information Systems	

Prepare For Hire page (1 of 2)

Start Date:	09/02/2003
Date Applied:	08/25/2003
Applicant Type:	External - New
Type of Hire:	
Contract Number:	
Applicant ID:	Verify Employee ID
	Employee ID not verified
Additional Hire Informat	on
	Send Offer Letter to HR
Hire Comments:	
Save & Submit Reques	t to HR Cancel

Prepare For Hire page (2 of 2)

Prepare for Hire

Use this group box to enter the detail about the hire. The displayed information defaults to the information entered on the job opening.

Job Opening	This defaults to the job opening you selected on the Find Applicants page. You can select another job opening
Position Number	If the system is configured for full or partial position management, this field initially displays the primary position, if any, that is associated with the job opening. You can select another position number if more than one position is associated with the job opening.
	If your system is configured to use full position management, this field is required.
	If your system is configured to use partial position management, this field is optional.
Job Code	This defaults to the primary job code associated with the job opening selected on the Find Applicants page. You can select another job code if more than one job code is associated with the job opening.
	If you enter a position number, the system enters the associated job code and makes the field read-only.
	If the applicant is not linked to a job code or position, you are required to enter one.

Start Date	Select the date on which the applicant is to begin their employment.
Type of Hire	Select the type of employment. The available options depend on the applicant type.
	For external applicants you can select <i>Hire</i> and <i>Add Contingent Worker</i> . If the applicant is identified as a previous employee by the Verify Employee ID process, then the <i>Rehire</i> option appears instead of the <i>Hire</i> option.
	For non-employee applicants (persons of interest or contingent workers), you can select <i>Hire</i> and <i>Add Contingent Worker</i> .
	For internal applicants (employees), you can select <i>Hire, Add Concurrent Job,Add Contingent Worker</i> , or <i>Transfer</i> .
Person Type	Displays the person of interest type if the applicant exists in the HR system as a person of interest. This field only appears on the page if the applicant exists in the system as a person of interest.
Verify Employee ID	Click to search the human resource database to see if the applicant was a former employee, contingent worker, or person of interest. This verification helps you avoid entering the same person into the system more than once.

Additional Hire Information

Send Offer Letter to HR	Select this check box if you want the system to include the job offer letter in the hire request message that it sends to the HR system. If multiple offers exist, the system includes the letter from the offer that is in <i>Accepted</i> status.
	If you send the job offer letter, the Manage Hires Detail page in PeopleSoft Human Resources displays a link that the user can click to open the offer letter.
	If you select this check box, the system confirms the existence of a job offer letter when you submit the hire request. If there is no offer letter to send, you can choose to cancel the request or to submit it without an offer letter. If you submit the request without an offer letter, the system deselects the check box.
	This check box appears only if the Manage Hire Setup page is configured so that the applicable hire type sends the offer letter to the HR system.
	See <u>Chapter 8, "Setting Up Additional Recruiting Definitions," Setting Up</u> the Data Transfer to HR, page 125.
Hire Comments	Enter any comment that you want the HR administrator to see.

Save & Submit Request to HR

Save & Submit Request to HR	Click to send an email notification to the administrator. The applicant appears in the Manage Hires component in Administer Workforce.
	The system also checks to see if <i>Required</i> is selected for the Enforce Empl ID Verification field on the Recruiting Installation - Applicants page. If it is, you will be required to run the Verify Employee ID process.

Reviewing Search/Match Results

Access the Search Results page (click the Verify Employee ID link on the Prepare for Hire page).

Search Results WARNING: Potential duplicates were found - this person may already exist in the database. Refer to the list below for possible matches to the person you are adding. After you select the return button at the bottom of the page, you'll be asked whether you want to continue adding this new person, or cancel this operation. Match Criteria					
Data					
Required	Description	Usage	Search Value		
First Name Search Contains		HE			
	Last Name Search	Contains	HA		
Г	Middle Name	Contains			
Г	Alternate Character Name	Contains			
Г	Date of Birth	Equals			
✓ Search Results Summary Number of ID's Found: 47 Search Order Number: 20					

Search Results page (1 of 2)

		Empl ID	Last Name	First Name	Middle Name
1	Carry IC				
2	Carry IC	Z3049	Chandara	Sheila	
3	Carry IC	TYCOHM10	Ingham	Stephen	Reciprocity
4	Carry IC	TQ813	SCHAPM-3R99A	ARHeadofHouseLowInc	
5	Carry IE	TQ807	SCHAPM-3R99A	ARHeadofHousehold	
6	Carry IC	TQ2274	Chambers	Matthew	
7	Carry IC	TQ2268	Chambers	Christopher	
8	Carry IC	SRNZL3001	Markham	Theresa	
9	Carry IE	SR13444	Beckham	Katherine	
10	Carry IC	SF0216	Hauer	Rochelle	
11	Carry IC	SF0114	Thatcher	Stephen	
12	Carry IE	SEV0989	Halcyon	D'orothea	
13	Carry IE	SEV0351	Halcyon	D'orothea	
14	Carry IC	QFE05	Cathay	Hermann	
15	Carry ID	MUTA117	Baharati	Mukherjee	

Search Results page (2 of 2)

Return

Click to return to the Prepare for Hire page without bringing over an employee ID.

Search Results: Results Tab

Carry ID Click to copy the employee ID to the Employee ID field on the Prepare for Hire page.

Search Results: Additional Information Tab

Person Organizational	Click to access the Person Organizational Summary page.
Summary	See <i>PeopleSoft HR 9.1 PeopleBook: Administer Workforce</i> , "Increasing the Workforce," Reviewing Organizational Relationships.
Relations With Institution	This field is not used by Talent Acquisition Manager

Withdrawing a Hire Request

Access the Withdraw from Hire page (select the *Withdraw from Hire* action in the Take Action field on the Find Applicants page or in the Manage Applicants grid on the Job Opening page).

Manage Applicant	t: Chad Brown		
Withdraw from Hire			
Applicant ID:	95		
Withdraw from Hire			
Status:	120 Withdrawn		
Status Date:	01/27/2009 🛐		
Status Reason:	•		
Submit Ca	ancel		

Withdraw from Hire page

Status Date	Enter the date that the applicant's disposition changes from <i>Ready to Hire</i> to <i>Withdrawn</i> .
	The withdraw message is sent immediately, regardless of the date that you enter.
Status Reason	If your organization has defined status reasons for the <i>Withdrawn</i> status, select the appropriate reason.
Submit	Click this button to send the cancellation message to the human resources system.

(AUS) Copying Salary Packages to Human Resources

This section provides an overview of how to copy salary packages to the human resource database.

Understanding How to Copy Salary Packages to the Human Resources Database

After you have received confirmation that the applicant has been hired, you want to copy the applicants salary package information to the human resource database.

Begin by searching for applicants with a status of Hired. Click the applicants name link on the Find Applicants page and from the Manage Applicant page, select *Copy Applicant to Employee* in the Take Action field.

Copying salary package information is discussed in the *PeopleSoft HR PeopleBook: Administer Salary Packaging*.

See *PeopleSoft HR 9.1 PeopleBook: Administer Salary Packaging*, "Modelling Salary Packages," Copying Applicant Salary Packages to the Employee Salary Package Component.

Chapter 21

Managing Job Openings

This chapter discusses how to:

- Search for job openings.
- Manage job openings.
- Print job openings.

Searching for Job Openings

This section provides an overview of job opening searches, describes common elements in the job opening search pages, and discusses how to:

- Search for job openings.
- Browse job openings.

Understanding Job Opening Searches

This section provides an overview of job opening searches.

Find Job Openings and Brows Job Openings

There are two methods of searching for existing job openings:

• Find Job Openings.

Find Job Openings enables you to search for specific job openings based on a variety of criteria.

• Browse Job Openings.

Browse Job Openings displays a list of job openings that is filtered based on three options: the user's association with the job opening, the job opening's status, and how recently the job opening's most recent status change occurred.

Performing Actions from the Job Opening Search Pages

Both the Find Job Openings page and the Browse Job Openings page provide the ability to perform actions on selected job openings. On both pages, the available actions vary depending on whether you searched for jobs in specific statuses.

The following table lists all possible actions that can be performed from the Find Job Openings page and the Browse Job Openings page. The table additionally describes when the action is available and what it does.

Action	Availability	Usage
Add Note	Always available.	Select this action to create a note that will be added to all of the selected job openings.
Delete	Available only when you search for job openings where the status is Draft.	Performing this action deletes the selected draft job openings immediately, without asking for user confirmation.
Approve, Deny, and Pushback	Available only when you search for job openings where the status is <i>Pending</i> or <i>Denied</i> .	Use these actions to perform approval-related actions. If a user other than the assigned approver (or that approver's proxy) initiates an approval-related action, the action will not update the job opening. Note. Although administrators can override approvals, they must perform approval actions on the Job Opening page. This ensures that the administrator reviews the job opening data before taking action.
<i>Cancel, Close,</i> and <i>Hold</i>	Available only when you search for job openings where the status is <i>Open</i> .	 Performing these actions makes a corresponding status change to all selected job openings. Note. For security reasons, recruiting administrators are the only users who can make direct edits to the Status Code field on the Job Opening page. Therefore, non-administrators who want to close a job opening, cancel it, or put it on hold must do so using the actions on the Find Job Openings or Browse Job Openings page.

Common Elements Used on Job Opening Search Pages

Create New Job	Click to access the Enter Primary Job Opening Information page, where you can create a new job.
Find Job Postings	Click to access the Search Postings - Basic Search page, where you can search for job postings.
	See <u>Chapter 14</u> , "Managing Job Postings," Searching for Job Postings, page <u>334</u> .

Pages Used to Search for Existing Job Openings

Page Name	Definition Name	Navigation	Usage
Find Job Openings	HRS_JO_FIND_JOB	Recruiting, Find Job Openings, Find Job Openings	Search for existing job openings.

Page Name	Definition Name	Navigation	Usage
Browse Job Openings	HRS_JO_360_LAUNCH	Recruiting, Browse Job Openings, Browse Job Openings	View existing job openings.

Searching for Job Openings

Access the Find Job Openings page (Recruiting, Find Job Openings, Find Job Openings).

ind Job Opening	js		
Enter Search Criteria			
Search Reset			
Job Opening ID:		Q	
Status:	Open	•	
Most Recent Activity:		•	
Job Opening Type:		•	
Hot Job:		•	
Display Jobs:		•	
Manager:		<u></u>	
Recruiter:		<u> </u>	
Originator:		Q	
Business Unit:		Q,	
Position Number:		Q	
Title:			
Recruitment Contact:			•
Search Reset			
Create New Job Browse J	ob Openings Find J	ob Postings	

Find Job Openings page – before performing a search

Fi	Find Job Openings								
Þ	▶ View Job Opening Search Criteria								
	✓ 4 Results Found								
S	ear	ch Results				Customize Fin	d View All 🗹	🖣 🛗 🛛 Firs	t 🗹 1-4 of 4 🖸 Last
		Job Opening	ID Nbr	Туре	Location	Target Openings	Available Openings	Hot Job	Created
Г		HRMS Analyst-35000	300008	Standard Requisition		1	1		01/07/2009
Γ		Analyst-HRMS	290036	Standard Requisition	Corporation Headquarters	1	1		06/10/2002
Г		HRMS Analyst	35000	Standard Requisition		1	1		09/13/2004
Г		Administrator-HRMS	10239	Standard Requisition	Corporation Headquarters	1	1		03/27/2006
Se	Select All Deselect All Select Action C								
	Create New Job Browse Job Openings Find Job Postings								

Find Job Openings page - after performing a search

Enter Search Criteria

Initially, the Enter Search Criteria section is expanded and displays all available search fields. After you perform a search, this section is collapsed, and the title changes to View Job Opening Search Criteria. You must expand the section before you can revise your criteria and perform another search.

Search	Click this button to search for job openings that meet the criteria you've entered.		
Reset	Click this button to clear all of the search criteria fields, including the default value in the Status field.		
Job Opening ID	Enter or select a single job opening ID. Searching by ID is the most efficient way to access the record for a specific job opening whose ID you know.		
Status	Select the status to include in the search. The default value is <i>Open</i> . You can clear the field, or select one of these other options: <i>Canceled, Closed, Denied, Draft, Hold</i> , and <i>Pending</i> .		
Most Recent Activity	To search based on how recently the job opening has had a status change select the time period to check for status-related activity: <i>Active within</i> <i>Today, Active within Yesterday, Active within Last 3 Days, Active within</i> <i>Last Week, Active within Last 2 Weeks, Active within Last Month, Active</i> <i>within Last Year, or Active within View All.</i>		
	Changes other than status changes are not considered activity for purposes of searching based on when the most recent activity occurred.		

Job Opening Type	Select the type of jobs to include in the search: <i>Continuous Job Opening</i> or <i>Standard Requisition</i> .
Hot Jobs	Select <i>Yes</i> or <i>No</i> to filter results according to whether the job opening has been identified as a hot job.
Display Jobs	Select which jobs to include in the search based on your role relative to the job opening. Options are:
	• All Jobs.
	• Jobs Assigned to me.
	A job is assigned to you if you are the primary hiring manager or primary recruiter.
	• Jobs Associated to me.
	A job is associated with you if you created it or you are on the hiring team.
	• Jobs Created by me.
Manager,Recruiter and Originator	Enter or select the employee ID of a person associated with the job opening.
Business Unit	Enter or select a business unit to include in the search.
Position Number	Enter or select a position to include in the search.
Title	Enter words to look for in the job posting title. The system searches for job openings that contain the words you enter; an exact match is not necessary.
Recruitment Contact	Select an external recruitment contact to include in the search.

Search Results

The Search Results grid displays the job openings that meet your search criteria. The columns in the grid correspond to the similarly-named search fields and job opening fields.

Job Opening	Displays the primary posting title for the job opening. If no job postings exist, this is the posting title that was initially entered on the Enter Primary Job Information page. The posting title is a link that you click to access the Job Opening page.
Target Openings and Available Openings	Displays information about the total number of positions to be filled and the number that have not yet been filled.
Hot Job	Displays Y (yes) or N (no) to indicate whether the job opening is a hot job.

Page Elements for Performing Actions

Select Action and Go	Select an action to perform on the selected job openings (those where you selected the check box next to the job title), then click the Go button to perform the action.		
	The available actions vary depending on whether you searched for jobs in specific statuses.		
	See <u>Chapter 21, "Managing Job Openings," Understanding Job Opening</u> Searches, page 577.		

Browsing for Job Openings

Access the Browse Job Openings page (Recruiting, Browse Job Openings, Browse Job Openings).

Browse Job Openings								
					Viev	<u>v Drafts</u> <u>Fi</u>	nd Job Ope	enings
Job Oper	nings							
Display:	Job Assigned to I	me 💌	Oper	n 💌	Active w	vithin Last Mo	nth 👤	ф.
Job Ope	enings Status: Open				<u>Customize F</u>	ind View All	F 📲 ا 🖪	irst 🗹 1 of 1 🖸 Last
Select	Job Opening	ID Nbr	Туре	Location	Target Openings	Available Openings	Hot Job	Created
	<u>Clerical Assistant -</u> <u>Medical Claims</u>	503706	Standard	Corporation Headquarters	10	10		08/04/2009
Select /	Select All Deselect All Select Action Go							
Create New Job Find Job Openings Find Job Postings View Drafts								

Browse Job Openings page

The list of job openings that meet your filtering criteria appears in a grid with the same columns as the Search Results grid on the Find Job Openings page.

View Drafts	Click to update change the page's display filters and refresh the view so that only jobs with <i>Draft</i> status appear.
	The system sets the first display field (which filters based on your relationship to the job) to <i>All Jobs</i> and sets the second filter (which filters on status) to <i>Draft</i> . The third display filter retains its previous value.
Find Job Openings	Click to display the Find Job Openings page.

Display

There are three drop-down list boxes for filtering job openings. After changing values in any of these fields, click the refresh icon to apply the selected filter.

<association></association>	The first drop-down list enables you to filter according to your relationship with the job opening. <i>Jobs Associated with me</i> are job openings that you created or where you are part of the hiring team. <i>Jobs Assigned to me</i> is a subset of the jobs associated with you; it includes only job openings where you are either the primary recruiter or the primary hiring manager. This is the default value. The other filtering options are <i>Jobs Created by me</i> and <i>All Jobs</i> .
<job opening="" status=""></job>	The second drop-down list box enables you to filter by status. The default value is <i>Open</i> . Other values include <i>All, Canceled, Closed, Denied, Hold,</i> and <i>Pending</i> .
<most activity="" recent=""></most>	The third drop-down list box enables you to filter by how recently the job opening has had a status change. Changes other than status changes are not considered activity for purposes of searching based on when the most recent activity occurred.
	To use this filter, select the time period to check for status-related activity: Active within Today, Active within Yesterday, Active within Last 3 Days, Active within Last Week, Active within Last 2 Weeks, Active within Last Month, Active within Last Year, or Active within View All.

Page Elements for Performing Actions

Select Action and Go	Select an action to perform on the selected job openings (those where you selected the check box next to the job title), then click the Go button to perform the action.
	the available actions vary depending on whether you used the second Display field (the one used to filter by job opening status) to search for jobs in specific statuses.
	See <u>Chapter 21, "Managing Job Openings," Understanding Job Opening</u> Searches, page 577.

Managing Job Openings

This section provides an overview of job opening pages, lists common elements, and discusses how to:

- Review applicants linked to job openings.
- Review job opening activity.
- Add notes to job openings.

- Add attachments to job openings.
- Add expenses to job openings.
- Review job opening details.

Understanding Job Opening Pages

The Job Opening page provides a single point from which you can complete many job-related and applicantrelated recruiting tasks. It includes four tabs:

• Manage Applicants

Use this tab to review applicants and perform various applicant-related tasks. This tab includes sections for viewing applicants (and performing applicant-related actions), screening applicants, and managing interview schedules.

See <u>Chapter 22</u>, "Managing Applicants," Actions in the Take Action Field, page 603; Chapter 17, "Screening and Routing Applicants," page 433 and <u>Chapter 18</u>, "Interviewing Applicants," page 479.

• Find Applicants

Use this tab to search for applicants to link to the job opening. The applicant searches are the same as those you perform outside the context of the job opening.

See Chapter 16, "Searching for Applicants," Performing Applicant and Profile Searches, page 399.

• Activity and Attachments

Use this tab to review job activity, notes, attachments, and expenses.

See Chapter 21, "Managing Job Openings," Reviewing Job Opening Activity, page 591.

• Job Opening Details

Use this tab to review the job opening data, including general job information, job qualifications, job postings, and the hiring team. The tab contents correspond to the page where you originally created the job opening.

See Chapter 13, "Creating Job Openings," page 231.

Common Elements Used in This Section

₩	This icon appears next to the job title when the job is a hot job.
	See <u>Chapter 24, "Managing Employee Referral Programs," Managing Hot</u> Jobs, page 740.
Save	Click to save your work.
Clone	Click to clone the current job opening. The system displays the Clone Job Opening page.

Create New	Click to create a new job opening. The system displays the Enter Primary Job Information page.
Previous Job Opening	Click to display the previous job opening from the Find Job Openings or Browse Job Openings list.
Next Job Opening	Click to display the next job opening from the Find Job Openings or Browse Job Openings list.
Job Opening List	Click to display either the Find Job Openings or Browse Job Openings page, with your previous search or filter criteria intact.

Pages Used to Manage Job Openings

Page Name	Definition Name	Navigation	Usage
Find Job Openings	HRS_JO_FIND_JOB	Recruiting, Find Job Openings	Search for and select job openings.
Job Opening	HRS_JO_360	Click the job opening link in Search Results group box on the Find Job Openings page.	Manage all aspects of a job opening, including managing applicants, finding applicants, reviewing activity, creating notes, attachments, and expenses, and viewing or updating the job opening itself.
Job Opening page: Manage Applicants tab: View Applicants section	HRS_JO_360	This is the section you see when you initially access the Job Opening page.	Review applicants for a job opening, and perform various applicant-related activities.
Job Opening page: Find Applicants tab	HRS_REC_SCHAPP	Click the Find Applicants tab on the Job Opening page.	Search for applicants for the job opening.
Job Opening page: Activity & Attachments tab	HRS_JO_360	Click the Activity & Attachments tab on the Job Opening page.	Review job status history, notes, attachments, expenses, and saved results from applicant searches.
Add Note	HRS_JO_NOTE_SEC	Click the Add Note link on the Job Opening page: Activity & Attachments tab.	Add a note to a job opening.
Add Expenses	HRS_JO_EXPENSE_SEC	Click the Add Expense link on the Job Opening page: Activity & Attachments tab.	Add an expense to a job opening.

Page Name	Definition Name	Navigation	Usage
Job Opening page: Job Opening Details tab	HRS_JOB_OPENING	Click the Job Opening Details tab on the Job Opening page.	Review or edit job opening details.

Reviewing Applicants Linked to Job Openings

Access the Job Opening page: Manage Applicants tab: View Applicants section (on the Find Job Opening page, click the job opening link in Search Results group box).

Find Job O	pening							
Job Op	ening							
						🔿 Prin	t Job Opening	1
Posting Title	e:	Eben Direc	tor			Job Ope	ening ID:	994488
Job Opening	g Status:	010 Open				Job Typ	e:	Standard
Job Title:		Eben Direc	tor			Job Cod	le:	Z00006
Position Nur	mber:	Z9944888	Eb	en Director				
Business Ur	nit:	ZBU00	eBen	efits Business	Unit 1			
Job Family:								
Save 8	Save Clone Create New Previous Job Opening Next Job Opening Job Opening List							
Manage Ap	pplicants Find	Applicants	Ad	tivity <u>&</u> Attachm	ents Jo	b Opening Det	ails	
View Applie	cants <u>Scree</u>	n Applicants	5	Interview So	chedule			
Manage Ap	oplicants							
Display:	All			•				
Applicants								
Select A	Applicant Name	ID	Туре	Disposition	Resume	Application	Last Updated	*Take Action
	<u>Ganguly Sarbani</u>	167	Ext	Hold			12/20/2005 7:21PM	Select Action
	Rupinder Arora	100133	Ext	Ready			12/20/2005 7:22PM	Select Action
Select All Deselect All *Group Action: Select Group Action								

Job Opening page: Manage Applicants tab: View Applicants section

Print Job Opening	Click to access the Select Job Openings page, where you configure and generate a printed version of the job opening data.
Screen Applicants	Click this link to access screening-related functionality.
	See Chapter 17, "Screening and Routing Applicants," page 433.

Interview Schedule	Click this link to access interview-related functionality. See <u>Chapter 18, "Interviewing Applicants," page 479.</u>	
Manage Applicants		
Display	To show only applicants who are at a specified stage in the hiring process, select the stage. The values in the drop-down list box correspond to the values that you see in the Disposition column in the Applicants grid.	
	Select <i>All</i> , which appears at the end of the list, to view all applicants without regard to their disposition.	
Applicants		
This grid displays applicants v	who are linked to the current job opening.	
Select	Use this check box to select applicants who will be affected by an action that you perform using the Group Action field.	
Applicant Name and ID	These fields display identifying information about the applicant. Click the Applicant Name link to display the Manage Applicant page, where you can see more detailed information about the applicant.	
Туре	Possible applicant types are <i>Emp</i> (employee), <i>Ext</i> (external applicant), or <i>Oth</i> (other).	
	The <i>Oth</i> value appears when the applicant type is <i>Non-Employee</i> , a value generally used for applicants who, although not current employees, already have data in the PeopleSoft HCM system.	
Disposition	Displays the applicant's current status in the hiring process.	
	Certain dispositions (those that are in the Screen, Route, Interview, and Offer phases) are links. Click the link to display the Disposition Details page where you can view and update disposition information.	
	See <u>Chapter 22, "Managing Applicants," Reviewing Disposition Details, page 615.</u>	
	Dispositions that are in the Review, Applied, Hire, and Reject phases are not links.	
	See <u>Chapter 4, "Setting Up Recruiting Statuses," Defining Statuses and</u> <u>Reasons Codes, page 50.</u>	

Resume	Click to open a new window that displays the applicant's resume.	
	• If the resume is an attachment, the file opens in the new window.	
	• If the resume was entered into the Resume Text field in the application, the new window displays the Applicant Resume page.	
	• If no resume exists for a particular applicant (for example, the applicant instead completed the work experience fields in the online application) then this column is blank.	
	If none of the applicants in the grid have resumes, the entire Resume column is hidden.	
Application	Click to open a new window that displays the Application Details page, where you can review the applicant's complete application. The Application Details page appears in read-only mode.	
Last Updated	Displays the date and time that the application disposition was last modified	
Take Action	Select an action to be performed on a specific applicant. The system performs the action immediately.	
	Use the Take Action field in the Applicants grid to perform actions that relate to the specific job application. (However, some of the available actions affect the overall applicant record.) When you select an action, the system immediately initiates it; you do not need to click a separate Go button.	
	In this context, the available actions are Add Applicant to New List, Add Applicant to Saved List, Change Applicant Status, Copy Applicant to Employee, Create Interview Evaluation, Create Salary Package Model, Forward Applicant, Link Applicant to Job, Manage Applicant Checklists, Manage Interviews, Pre-Employment Check, Prepare for Hire, Prepare Job Offer, Print Application Details, Reject Applicant, Route Applicant, Send Correspondence, and Withdraw from Hire.	
	See <u>Chapter 22, "Managing Applicants," Actions in the Take Action Field, page 603.</u>	

Group Action	
Group Action and Go	Select an action to be performed on all selected applicants. Unlike actions performed on a single applicant using the Take Action field, the system does not perform the action immediately. Instead, you must click theGo button to initiate the selected action.
	Generally, the actions available as group actions are a subset of the actions that you can perform on individual applicants. These are the actions that you can <i>not</i> perform on a group: <i>Copy Applicant to Employee, Create Salary Package Model, Manage Applicant Checklists, Pre-Employment Check, Prepare for Hire, Prepare Job Offer,</i> and <i>Withdraw from Hire.</i>
	Additionally, the <i>Edit Applicants</i> action is exclusively a group action. Perform this action to open the Application Details page. When you access the Application Details page this way:
	• The page initially displays the first selected application,
	• The Previous Applicant and Next Applicant links enable you to page through all of the applicants in your original selection.
	• The Applicant List link returns you to the Job Opening page.

Finding Applicants Within the Context of a Job Opening

Access the Job Opening page: Find Applicants tab (on the Job Opening page, click the Find Applicants tab).

Job Opening	J							
					a e	rint Job Oper	ning	
Posting Title:	Eber	n Director			Job O	pening ID:	994488	
Job Opening Status:	010	Open			Job Ty	/pe:	Standard	
Job Title:	Eber	n Director			Job C	ode:	Z00006	
Position Number:	Z994	44888 Eb	en Director					
Business Unit:	ZBU	00 eBen	efits Business U	Jnit 1				
Job Family:								
Save Save Clone	e 🖉 Create N	lew Previ	ous Job Openin	g Next Job (Opening	Job Opening	<u>q List</u>	
Manage Applicants	Find Appli	cants Ac	tivity <u>&</u> Attachme	nts Job C)pening D	etails		
Saved Searches &	Automatches	A	dvanced Search	<u>1</u>				
Target Profile Type								
Saved Searches &	Automatches				Per	sonalize Find	View All 🗖 First 🕻	1 of 1 🖸 Last
Search Name	Results Type▼	Search Type	Last Updated	Job Opening	Туре	Active	Run Search	Delete
AUTOMATCH FOR 994488	Automatch	Advanced	2012-01-05	Eben Director	Public	Yes	View Results	Î
Find Applicants								
·								
Manage Applicants				<u>s</u> <u>Job Openi</u>	ing Details	<u>s</u>		
Saved Searches &	Automatches	Advanced	Search					
Save R Clone								

Job Opening page: Find Job Openings tab

Saved Searches & Automatches

The Saved Searches & Automatches subsection renders the Saved Searches page within the context of the job opening. In this context, the grid shows only the saved searches that are associated with the current job.]

See Chapter 16, "Searching for Applicants," Working With Saved Searches, page 423.

The same searches appear in the Related Searches grid on the Activity & Attachments tab, but additional columns are visible here on the Find Applicants tab, and the Find Applicants tab provides the ability to delete automatch and criteria searches.

Advanced Search

The Advanced Search subsection renders the Find Applicants page within the context of the job opening so that users can more easily search for qualified applicants.

See Chapter 16, "Searching for Applicants," Performing Applicant and Profile Searches, page 399.

Reviewing Job Opening Activity

Access the Job Opening page: Activity & Attachments tab (on the Job Opening page, click the Activity & Attachments tab).

Find Job Oper	ning						
Job Open	ing						
			🚑 Print Job Ope	ening			
Posting Title:Eben DirectorJob Opening ID:994488Job Opening Status:010 OpenJob Type:StandardJob Title:Eben DirectorJob Code:Z00006Position Number:Z9944888Eben DirectorBusiness Unit:ZBU00eBenefits Business Unit 1Job Family:							
	Save Image Applicants Find Applicants Activity & Attachments Job Opening Details						
Job History		<u>Find</u> `	view All 🗖 📔 F	irst 🚺 1-2 of 2 🕨 Last			
Date	Subject	Reason	Action T	aken By			
04/14/2003	04/14/2003 010 Open Betty Locherty						
04/14/2003	04/14/2003 010 Open Betty Locherty						
Related Searches Personalize Find View All Rirst C 1 of 1 Last							
Last Updated	AUTOMATCH FOR 994488	Results Type		Туре			
1/5/2012	AUTOMATCH FOR 994488	Automatch	View Results	Public			

Job Opening page: Activity & Attachments tab (1 of 2)

Notes							Ei	nd View All	<u>م</u> ا	First 🗹	l of 1 🖸 L	ast
ID Nbr	Subject	Subject				Note Dat	e	Author		View Notes		
1	Note to interviewers				08/18/2	009	Betty Locher	ty	View Note:	<u>5</u>	Î	
+ Add	I Note											
Attach	ments											
File Nan	ne		Descriptio	n A	Audie	ence	Update	d	Uploa	ded By	Delete	
Intervie	wing Tips.d	<u>oc</u>				•	08/18/2	2009 5:08PM	Betty	Locherty	Î	
+ <u>Ad</u>	ld Attachmen	<u>it</u>										
Expen	ISES											
Expens	e	Amount		Curren	су	Date	0)isplay Name	Exp	oense Detai	ls	
Publica	tion \$500.00				08/18/2	2009		Ex	pense Deta	ils	Î	
+ Add Expense												

Job Opening page: Activity & Attachments tab (2 of 2)

Job History

This grid displays the activity history related to the job opening. Any changes made to the job opening status are reflected in this grid.

Searches

This grid displays a list of saved applicants searches that have a job opening as part of the search criteria. You can click the <Name> link to display the search criteria. An additional link for each search enables to view the search results.

Notes

This grid displays a list of notes related to the job opening.

View Note	Click to display the Add Note page and view the content of the note.
Add Note	Click to display the Add Note page.

Attachments

This grid displays a list of attachments related to the job opening.

Description and Audience	If the attachment audience is <i>Public</i> , then anyone with access to the job opening can delete the attachment, edit the attachment description, or modify the audience.
	If the attachment audience is <i>Private</i> or <i>Interview</i> , only the person who uploaded the attachment can delete the attachment, modify the description, or modify the audience.
	Interview attachments don't automatically appear in on the Interview Schedule page, but the Interview Schedule page provides links that enable you to copy Interview attachments from the job opening to the interview.
Add Attachment	Click to display a browser window, where you can search for document to attach to the job opening.

Expenses

This grid displays a list of expenses associated to the job opening.

Expense Detail	Click to display the Add Expense page and view the detailed information of the expense.
Add Expense	Click to display the Add Expense page, where you can add a new job opening related expense.

Adding Notes to Job Openings

Access the Add Note page (on the Job Opening page: Activity & Attachments tab, click the Add Note) link).

Add Note							
Job Opening	ID:	994488					
Note							
Note Date:	08/18/2009	31			Audience:	Private	•
Subject:							
Notes:							24
	I						
Save & Return Cancel							

Add Note page

Audience	Select the audience for this note. Valid options are:			
	• <i>Interview:</i> Interview notes can be viewed by anyone who has access to the job opening, but only the creator of the note can modify the note. Interview notes don't automatically appear in on the Interview Schedule page, but the Interview Schedule page provides links that enable you to copy Interview notes from the job opening to the interview.			
	• <i>Private:</i> Private notes can be viewed and edited only by the originator.			
	• <i>Public</i> :Public notes can be viewed and edited by anyone who has access to the job opening.			

Adding Expenses to Job Opening

Access the Add Expenses page (on the Job Opening page: Activity & Attachments tab, click the Add Expense link).

Add Expenses	
Job Opening ID:	994488
Add new Expense	
*Expense Code:	Publication
*Expense Amount:	500.00 USD 🔍
*Charge Date:	08/18/2009
Business Unit:	ZBU00 eBenefits Business Unit 1
Department:	ZD0000006 🧠 Eben Strategy Department
Applicant Name:	
Description:	Job Posting
OK Cancel	

Add Expenses page

Job opening expenses are costs incurred for the job opening, such as costs of advertising or engaging an agency to handle the job opening. If the expense cannot be attributed to a specific applicant, use the Add Expenses page to tie the expense to the job opening.

Expense Code	Select the expense code.
Expense Amount	Enter the amount of the expense.

Charge Date	Enter the date the expense was incurred.
Business Unit	Select the business unit. The default is the business unit associated to the job opening.
Department	Select the department. The default is the department associated to the job opening.
Applicant Name	Enter the applicant name. For job opening expenses, this should be blank.
Description	Enter a description of this expense.

Reviewing Job Opening Details

Access the Job Opening page: Job Opening Details tab (click the Job Opening Details tab on the Job Opening page).

The page that appears is similar to the page that you use to create job openings. This is used to review the job opening when approvals is used.

See <u>Chapter 13, "Creating Job Openings," page 231</u> and <u>Chapter 9, "Setting Up Recruiting Templates,"</u> <u>Understanding Job Opening Templates, page 151.</u>

There are restrictions on who can update the job opening data:

- If the status of the job opening is *Draft*, only the creator of the job opening can update the information .
- Interviewers do not have access to Salary information.
- If status is Hold, Cancelled, or Closed, only Recruiting Administrators can update data.

Printing Job Openings

This section provides an overview of printing a job opening and discusses how to:

- Select sections to print.
- Preview and print job opening details.

Understanding Job Opening Printing

To print job opening information for a single selected job opening, click the Print Job Opening link that appears on many job-related pages in the system. Clicking this link generates a print-friendly consolidated view of the job opening sections that you choose to include.

When you select specific sections of information that you want to include in your printout, two types of sections are available:

• Sections that correspond to the layout of the Job Opening Details tab on the Job Opening page.

The layout of sections within the Job Opening Details tab comes from the job opening template. Templates define the layout in two levels: *pages*, which the system renders as links under the Job Opening Details tab, and *sections* on those pages, which the system renders as either groups of fields or grids.

All of the sections in the associated job opening template appear in the list of sections. However, sections that do not contain any data do not appear in the final printed document, even if you select that section as one you want to include.

For example, if the template includes a section for competencies, then competencies appears in the list of available sections. But if a specific job opening doesn't list any competencies, then the printout will not have a competencies section at all rather than having a blank section for competencies.

• Sections that correspond to the layout of the Activity & Attachments tab on the Job Opening page.

This is a static set of sections: Job History, Notes, Attachments, and Expenses.

Only those sections that have data are available for selection. For example, if the job opening doesn't have any attachments, then the attachments section does not appear in the list of sections. Additionally, the Notes section appears only if you have access to at least one note, as determined by the normal security for public and private notes.

Note. The job opening printout never includes any applicant data.

Page Name	Definition Name	Navigation	Usage
Select Job Opening Sections	HRS_JO_PRNT_SECT	Recruiting, Find Job Openings	Select which sections of the job opening to include when
		Click a job opening in the Search Results grid to access the Job Opening page.	printing.
		Click the Print Job Opening link on the Job Opening page. (This link also appears on many other job- related pages in the system.)	
Job Opening Printable Details	HRS_JO_PRINT_PAGE	Click the Preview Printable Details link on the Select Job Opening Sections page	Review and print the selected job opening data.

Pages Used to Print Job Openings

Selecting Sections to Print

Access the Select Job Opening Sections page (click the Print Job Opening link on the Job Opening page).

Select Job Opening Sections								
	 Select the sections of the job opening that you want to print. Select the Preview Printable Details hyper link. 							
Job Openir	Job Opening ID: 35000 HRMS Analyst							
Select All	Deselect All Preview Printable Details Return to Previous Page							
Job Open	ing Print Selection Customize Find 🔤 🛗 🔣 1-24 of 24 🗅 Last							
Select	Section to Print [PAGE.Section]							
V	JOB DETAILS.Job Information							
•	JOB DETAILS.Staffing Information							
	JOB DETAILS.Salary Information							
	QUALIFICATIONS.Education and Experience							
•	QUALIFICATIONS.Screening Question							
2	QUALIFICATIONS.Areas of Study							
•	QUALIFICATIONS.Competencies							
2	QUALIFICATIONS.Degrees							
V	QUALIFICATIONS.School Education							
	QUALIFICATIONS.E&G Special Projects							
	QUALIFICATIONS.Elements							
	QUALIFICATIONS.Honors and Awards							
	QUALIFICATIONS.Licenses & Certifications							
~								
Select All	Deselect All Preview Printable Details Return to Previous Page							

Select Job Opening Sections page

Select

Select the check box for the sections that you want to include in your job opening printout. The Job Information section is always selected, even if you click the Deselect All link. This ensures that identifying information about the job opening always appears in your printout.

Section to Print	Displays a list of sections that are available for printing. The specific sections in the list depend on the job opening.
	First, you see the sections that correspond to the job opening template that controls layout of the Job Opening Details tab. Sections appear in the order determined by the template. These section names use the format <page>.<section>. In terms of the layout on the Job Opening page, <i>PAGE</i> refers to the links directly under the Job Opening Details tab and <i>section</i> refers to the sections that appear when you click those links. For example, if the Qualifications link under the Job Details tab has a section for competencies, that section appears in the list as QUALIFICATIONS.Competencies.</section></page>
	Next, the grid lists the sections that correspond to the grids in the Activity & Attachments Tab on the Job Opening page. The grid lists these sections using the format OTHER. <section>. For example, if the job opening has any notes (and you have access to at least one note), the grid includes a row for OTHER.Notes.</section>
Preview Printable Details	Click this link to continue to the Job Opening Printable Details page, where you can preview and print the selected job opening data.

Previewing and Printing Job Opening Details

Access the Job Opening Printable Details page (click the Preview Printable Details link on the Select Job Opening Sections page).

Job Opening	Details	Return to Previous Page	Print this Page	
🗢 General Informatio	n			
Job Opening ID: Job Opening Type: Posting Title: Job Title: Job Family:	35000 Standard HRMS Analyst Analyst-HRMS			
Job Information				
Created By: Created: Openings to Fill: Target Openings: Available Openings: Establishment ID:	KU0007 09/13/2004 Limited 1 1	Betty Locherty		
Business Unit:	GBIBU	Global Business Institute BU		
Company:	GBI	Global Business Institute 9999		
Department:	10000	Human Resources		
Status Code:	010 Open			
Status Reason:	Re-Opened			
Status Date:	09/13/2004			
Desired Start Date:				
Encumb Date:				
Projected Fill Date:				
Date Authorized:	09/13/2004			
Referral Program ID:	1- <i>1</i>			
Recruitment Contact:	Jeffrey Franken:	S		
Recruiting Locatio	ns			
Recruiting Area Lo 1220 Ca	cation Ilifornia	Target Openings 1	Primary Yes	
✓ Positions				

Job Opening Printable Details page

Note. This is a partial screen shot.

This page displays all of the selected job opening information in a consolidated format. Scroll to review all of the data that you chose to include.

Print this PageClick this button to open a standard print dialog box and print the job
opening. If you collapse any sections before printing, those sections appear
collapsed on the final printout.The final print output is further optimized for printing and thus differs from
what you would get if you simply used your browser's print command. For
example, the navigation links at the top of the page do not appear on the
printout, and the section titles are rendered as dark text rather than as white

text in a colored bar.

Chapter 22

Managing Applicants

This chapter provides an overview of applicant management and discusses how to:

- Track applicant activity.
- Manage contact notes.
- Review applicant data.
- Link applicants to job openings.
- Print application details.
- Send correspondence and recruitment letters.
- Forward applicants.
- Reject applicants.
- Change applicant statuses.
- Manage applicant lists.
- Create applicant checklists.
- Add persons of interest.
- Process duplicate applicants.
- Use the job search agent.
- Generate recruitment reports.

Understanding Applicant Management

There are different mechanisms for performing different types of applicant management tasks. This section briefly describes the following mechanisms and the tasks for which they are used:

- The Manage Applicant page.
- Actions in the Take Action field
- Processes and reports.

The Manage Applicant Page

The Manage Applicant page provides a central location for reviewing applicant data and performing applicant-related tasks. For the most part, the page summarizes data and provides links to other pages where users can add or update the data, but there are a few sections on the page where users enter data directly.

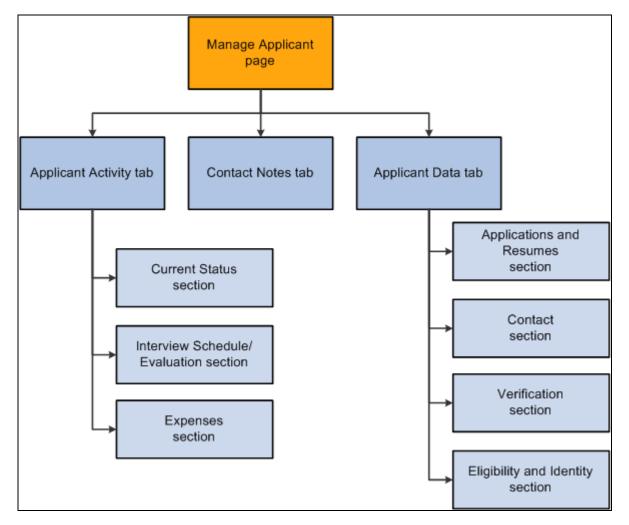
The Manage Applicant page has three tabs, two of which are divided into subsections for different types of data. The tabs are:

- Applicant Activity tab.
 - The *Current Data* section summarizes the applicant's disposition for each job to which the applicant is linked. If the applicant applied without selecting a job, there is a row of data to track that disposition as well. Links in this section provide access to the disposition details and to job opening information.
 - The *Interview Schedule/Evaluation* section summarizes interview activity for the applicant. Links in this section provide access to the Schedule Interview component where users create and update interviews.
 - The *Expenses* section summarizes applicant-related expenses. Links in this section enable you to create expense records and view expense details.
- Contact Notes tab.

This tab summarizes interactions with the applicant by showing a contact note for each interaction. Contact notes can be system-generated or manually created. Links on this tab enable you to add contact notes and view note details. An additional grid on this page enables you to identify interested parties so that they can be easily copied on email correspondence.

- Applicant Data tab.
 - The *Applications and Resumes* section summarizes the applications that the applicant has submitted. Links in this section enable you to view the complete application details and to add new applications.
 - The *Contact* section contains name, address, email, phone, and status information for the applicant. Users update these fields directly on the Manage Applicant page.
 - The *Verification* section summarizes the applicant's references. Links in this section enable you to add references and view reference details.
 - The *Eligibility & Identity* section contains both general and country-specific personal information, work eligibility information (such as citizenship), bank account information, and disability-related information. Users update these fields directly on the Manage Applicant page.

This diagram illustrates the hierarchical structure of the tabs and sections on the Manage Applicant page:



Information hierarchy on the Manage Applicants page

Actions in the Take Action Field

Talent Acquisition Manager provides many predefined recruiting tasks that you perform by selecting an action from the Take Action fields or Group Action fields that appear on several pages, including the Manage Applicant page.

Pages Where Actions are Available

Recruiting actions can be associated with either the overall applicant record or with a specific job application; the association determines which actions are available. For example, the action that prepares a job offer is only available for a specific job application, while the actions that merge duplicate applicant records are available only for the overall applicant. For convenience, some actions that apply to the overall applicant also available at the job application level.

Here is where you find action fields that are associated with specific job applications:

- The Find Applicant page: Search Results grid.
- The Manage Applicant page: Applicant Activity tab: Current Status section: Applicant Activity grid.

• The Job Opening page: Manage Applicants tab: View Applicants section: Manage Applicants grid.

Here is where you find action fields that are associated with the overall applicant record:

- The header of the Manage Applicant page.
- The Applicant List page.

Individual Actions Vs. Group Actions

In grids, the Take Action field appears in each row so that you can act on an individual row of data. The system initiates the selected action as soon as it is selected (that is, there is not a separate step for initiating the selected action).

If you were to use the keyboard up and down arrows to scroll through items in the drop-down list, the system would initiate the first action that you reached and render it impossible to scroll further to perform other actions. Therefore, to use the keyboard to perform actions on individual rows, users must first press the Alt-Down Arrow keyboard combination to open the drop-down list, use the up and down arrows to scroll through the values in the list, then press the Enter key to select the action and initiate the action.

Some grids also offer a Group Action field that appears below the grid and enables you to act on multiple rows of data at once. You first select the grid rows that you want to include, then you select the action in the Group Action field, and finally you click the Go button to initiate the action. Because the system does not initiate the action until you press the Go button, keyboard users do not have to perform any extra steps before using the arrow keys to scroll through items in the drop-down list box.

The Group Action field generally lists a subset of the actions that are available to perform on individual rows.

Group actions area available in these locations:

- The Find Applicant page: Search Results grid.
- The Manage Applicant page: Applicant Activity tab: Current Status section: Applicant Activity grid.
- The Applicant List page.

The Applicant List page is unique in that it has a field for performing group actions, but it does not have a Take Action field in each row of the grid that lists applicants. To act on a single row, select only the one row before initiating the group action.

Summary of Action Availability

The following table lists the actions that you use to manage applicants. For each page where you can perform actions, the table indicates whether you can perform the action on one row of data (using the Take Action field) or many (using the Group Action field).

Note. Group actions are not available on the Manage Applicant page. Actions performed at the header level apply to the overall applicant record, while actions performed in the Applicant Activity grid apply to the specific job application.

Action	Manage Applicant Page: Header Level	Manage Applicant Page: Applicant Activity Grid	Find Applicants Page: Search Results Grid	Job Opening Page: Manage Applicants Grid	Applicant List page	Reference
Add Applicant to New List	One row only	Not available	One or many rows	One or many rows	Not available	See <u>Chapter</u> 22, "Managing <u>Applicants,"</u> <u>Managing</u> <u>Applicant</u> <u>Lists, page 654</u> <u>-</u>
Add Applicant to Saved List	One row only	Not available	One or many rows	One or many rows	Not available	See <u>Chapter</u> 22. "Managing <u>Applicants,"</u> <u>Managing</u> <u>Applicant</u> <u>Lists, page 654</u> <u>-</u>
Add Note	Not available	Not available	Not available	Not available	Many rows.	See <u>Chapter</u> 22. "Managing <u>Applicants,"</u> <u>Managing</u> <u>Contact Notes,</u> <u>page 619.</u>
Add Person of Interest	One row only Note. Applicant must be an external applicant.	Not available	Not available	Not available	Not available	See <u>Chapter</u> 22, "Managing <u>Applicants,"</u> <u>Adding</u> <u>Persons of</u> <u>Interest, page</u> <u>663.</u>
Add to Another List	Not available	Not available	Not available	Not available	Many rows.	See <u>Chapter</u> 22, "Managing <u>Applicants,"</u> <u>Adding</u> <u>Applicants to</u> <u>an Existing</u> <u>List, page 661.</u>
Change Applicant Status	One row only	Not available	One or many rows	One or many rows	Not available	See <u>Chapter</u> 22, "Managing <u>Applicants,"</u> <u>Changing</u> <u>Applicant</u> <u>Statuses, page</u> <u>653.</u>

Action	Manage Applicant Page: Header Level	Manage Applicant Page: Applicant Activity Grid	Find Applicants Page: Search Results Grid	Job Opening Page: Manage Applicants Grid	Applicant List page	Reference
Copy Applicant To Employee	Not available	One row only	One row only	One row only	Not available	See <u>Chapter</u> 20, "Hiring <u>Applicants,"</u> (AUS) <u>Copying</u> <u>Salary</u> <u>Packages to</u> <u>Human</u> <u>Resources,</u> <u>page 575.</u>
Create Interview Evaluation(s)	Not available	One row only	One row only	One or many rows	Not available	See <u>Chapter</u> <u>18,</u> <u>"Interviewing</u> <u>Applicants,"</u> <u>Completing</u> <u>Interview</u> <u>Evaluations,</u> <u>page 507.</u>
Create New List	Not available	Not available	Not available	Not available	Many rows.	See <u>Chapter</u> 22, "Managing <u>Applicants,"</u> <u>Creating</u> <u>Applicant</u> <u>Lists, page 658</u> <u>-</u>
Create Salary Package Model	Not available	One row only	One row only	One row only	Not available	See <u>Chapter</u> <u>20, "Hiring</u> <u>Applicants,"</u> (AUS) <u>Creating</u> <u>Salary</u> <u>Packages,</u> page 564.
Edit Application	Not available	Not available	Not available	Available only as group action	Not available	See <u>Chapter</u> 21, "Managing Job Openings," Reviewing Applicants Linked to Job Openings, page 586.

Action	Manage Applicant Page: Header Level	Manage Applicant Page: Applicant Activity Grid	Find Applicants Page: Search Results Grid	Job Opening Page: Manage Applicants Grid	Applicant List page	Reference
Forward Applicant	One row only	Not available	One or many rows	One or many rows	Many rows.	See <u>Chapter</u> 22, "Managing <u>Applicants,"</u> Forwarding <u>Applicants,</u> page 647.
Link Applicant to Job	One row only	Not available	One or many rows	One or many rows	Many rows.	See <u>Chapter</u> 22, "Managing <u>Applicants,"</u> <u>Linking</u> <u>Applicants to</u> <u>Job Openings,</u> <u>page 629.</u>
Manage Applicant Checklist(s)	Not available	One row only	One row only	One row only	Not available	See <u>Chapter</u> 22, "Managing <u>Applicants,"</u> <u>Creating</u> <u>Applicant</u> <u>Checklists,</u> <u>page 661.</u>
Manage Applicant Contracts	One row only	Not available	Not available	Not available	Not available	See <u>Chapter</u> 20, "Hiring <u>Applicants,"</u> <u>Creating</u> <u>Applicant</u> <u>Contracts,</u> <u>page 558.</u>
Manage Interviews	Not available	One row only	One or many rows	One or many rows	Not available	See <u>Chapter</u> <u>18.</u> <u>"Interviewing</u> <u>Applicants,"</u> <u>Scheduling</u> <u>Interviews,</u> <u>page 481.</u>
Merge as Source	One row only	Not available	Not available	Not available	Not available	See <u>Chapter</u> 22, "Managing <u>Applicants,"</u> <u>Manually</u> <u>Merging</u> <u>Applicants</u> <u>from the</u> <u>Source</u> <u>Record, page</u> <u>677.</u>

Action	Manage Applicant Page: Header Level	Manage Applicant Page: Applicant Activity Grid	Find Applicants Page: Search Results Grid	Job Opening Page: Manage Applicants Grid	Applicant List page	Reference
Merge as Target	One row only	Not available	Not available	Not available	Not available	See <u>Chapter</u> 22, "Managing <u>Applicants,"</u> <u>Manually</u> <u>Merging</u> <u>Applicants</u> <u>from the</u> <u>Target Record,</u> <u>page 676.</u>
Pre- Employment Check	One row only	Not available	Not available	One row only	Not available	See <u>Chapter</u> 20, "Hiring <u>Applicants,"</u> <u>Completing</u> <u>Pre-</u> <u>Employment</u> <u>Checks, page</u> <u>555.</u>
Prepare for Hire	Not available	One row only	One row only	One row only	Not available	See <u>Chapter</u> 20, "Hiring <u>Applicants,"</u> <u>Hiring</u> <u>Applicants,</u> <u>page 564.</u>
Prepare Job Offer	Not available	One row only	One row only	One row only	Not available	See <u>Chapter</u> 19, "Making Job Offers," Creating Job Offers, page 529.
Print Application Details	Not available	One row only	One or many rows	One or many rows	Not available	See <u>Chapter</u> 22, "Managing <u>Applicants,"</u> <u>Printing</u> <u>Application</u> <u>Details, page</u> <u>632.</u>
Reject Applicant	Not available	One row only	One or many rows	One or many rows	Not available	See <u>Chapter</u> 22, "Managing <u>Applicants,"</u> <u>Rejecting</u> <u>Applicants,</u> page 652.

Action	Manage Applicant Page: Header Level	Manage Applicant Page: Applicant Activity Grid	Find Applicants Page: Search Results Grid	Job Opening Page: Manage Applicants Grid	Applicant List page	Reference
Route Applicant	Not available	One row only	One or many rows	One or many rows	Many rows.	See <u>Chapter</u> <u>17, "Screening</u> <u>and Routing</u> <u>Applicants,"</u> <u>Routing</u> <u>Applicants,</u> <u>page 473.</u>
Send Corresponden ce	One row only	Not available	One or many rows	One or many rows	Many rows.	See <u>Chapter</u> 22, "Managing <u>Applicants,"</u> <u>Sending</u> <u>Correspondenc</u> <u>e and</u> <u>Recruitment</u> <u>Letters, page</u> <u>635.</u>
Withdraw From Hire	Not available	Not available	Not available	One row only Note. Valid only when the disposition is <i>Ready to Hire</i> and the job opening, if any, is in an <i>Open</i> status.	Not available	See <u>Chapter</u> 20, "Hiring <u>Applicants,"</u> <u>Withdrawing a</u> <u>Hire Request,</u> <u>page 575.</u>

One additional action, *Invite Application*, is available from the Recruitment Profile Match page when you search for employees with profiles that match a particular job opening's profile. When you invoke this action, the system sends the employee an email invitation to apply for the job opening.

See Chapter 16, "Searching for Applicants," Performing Profile Searches, page 416.

Processes and Reports

To run a process or report, navigate to the appropriate run control page, enter any necessary parameters, and submit the process or report to the Process Scheduler.

Use this mechanism to perform these tasks:

- Identify and merge duplicate applicants.
- Run the job search agent.

This process notifies applicants of job openings that meet their specified criteria.

• Generate recruiting reports.

See Also

Chapter 22, "Managing Applicants," Processing Duplicate Applicants, page 665

Chapter 22, "Managing Applicants," Using the Job Search Agent, page 677

Chapter 22, "Managing Applicants," Generating Applicant Reports, page 679

Tracking Applicant Activity

You track an applicant's activity using the Manage Applicant page: Applicant Activity tab: Current Status section, which shows the applicant is in the recruitment process for each associated job opening.

This section provides an overview how to track selectees for Japan, and discusses how to:

- Review applicant dispositions.
- Review disposition details.
- Review interview schedules and evaluations.
- Review applicant expenses.
- Add applicant expenses.

(JPN) Understanding How to Track Selectees for Japan

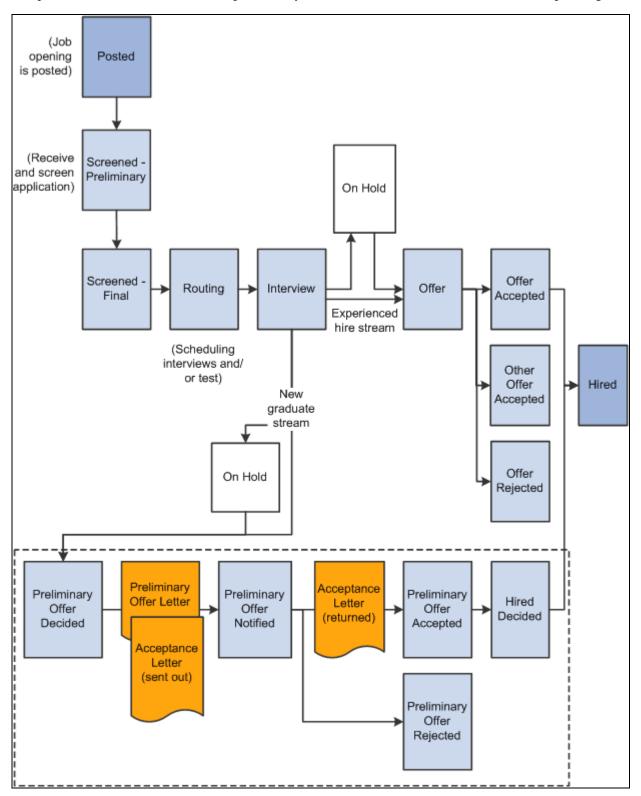
The standard PeopleSoft recruitment process begins with posting job openings and ends with hiring, when applicants become employees. In between job opening posting and hiring, there are the other recruitment activities, such as screening, interviewing, and offering and accepting employment.

The recruitment process followed by most Japanese companies, however, uses *selectee* dispositions between applicant and employee when processing new graduates. The new graduates become known as selectees when they have one of these four user-maintained dispositions related to preliminary offers:

- Preliminary offer decided.
- Preliminary offer notified.
- Preliminary offer accepted.
- Preliminary offer rejected.

Hire Decided is a fifth user-maintained disposition; when it is applied, the applicant is no longer considered a selectee. You manually enter the Hire Decided disposition when an applicant who has accepted a preliminary offer is about to be hired. The disposition of Preliminary Offer Accepted remains until that decision is made because it is possible that an applicant who has accepted might not in fact graduate and may not, therefore, be hired. The Hire Decided disposition distinguishes between those who have accepted and *might* be hired and those who have accepted and *will* be hired.

This flowchart illustrates the common additional Japanese recruitment stages for preliminary offers within the context of the standard recruitment process. The flowchart represents an organization that includes an acceptance letter with its version of a preliminary offer letter for the selectee to use when responding:



Japanese recruitment stages for preliminary offers within the overall recruitment flow

Page Name	Definition Name	Navigation	Usage
Manage Applicant page: Applicant Activity tab	HRS_MANAGE_APP	Recruiting, Find Applicants, Find Applicants Click an applicant name link in the Search Results grid on the Find Applicants page.	Review applicant recruitment data and perform various applicant related tasks.
Disposition Details	HRS_APP_RCMNT	Click the link in the Disposition column in the Search Results grid on the Find Applicant page or on the Manage Applicant page: Applicant Activity tab: Current Status grid.	Edit disposition details. The options on this page vary depending on the applicant's disposition.
Applicant Resume	HRS_APP_RESUME	 Click the Resume icon on the Manage Applicant page: Applicant Activity tab: Current Status section. Click the Resume icon in the Applicants grid on the Manage Applicant page: Applicant Activity tab: Current Status section. 	View an applicant's resume.
Add Expenses	HRS_APP_EXP_SP	Click the Add New Expense link or the Expense Details link on the Manage Applicant page: Applicant Activity tab: Expenses section.	Enter applicant expenses.

Reviewing Applicant Dispositions

Access the Manage Applicant page: Applicant Activity tab: Current Status section (on the Find Applicants page, click an applicant name link in the Search Results grid).

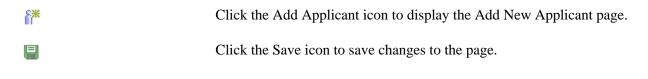
Manage Applicant: Bob Montana				
Name: Bob M Applicant ID: 1027	Iontana		plicant Ty)I Type:	pe: External Applicant
Contact: EMail		Sta	atus:	010 Active
	55-1212		Idress:	678 Oakdale Drive Pleasanton, CA 94588
Email: HCMG	ENUser1@ap6	023fems.us.	oracle.com	Preasanton, CA 94566
🎢 🗏 🛛 Take Action:	Select Ac	xtion		Go Previous Applicant Next Applicant Applicant List
	ontact Notes	Applicant D	ata Expense	20
Applicant Activity			<u>Expone</u>	
Job Opening	Disposition	Last Updated	Resume	*Take Action
HRIS Specialist - 30017	060 Interview	09/14/2004 11:48AM		Select Action
Manager- Compensation/Benefits - 30023	020 Applied	09/01/2004 12:00AM	ß	Select Action
<u>Staff Analyst - 30019</u>	020 Applied	09/01/2004 12:00AM	ß	Select Action
Senior Financial Analyst - 30018	020 Applied	09/01/2004 12:00AM	Ē	Select Action
+ Add New Disposition	<u>Niew A</u>	ctivity History		

Manage Applicant page: Applicant Activity tab: Current Status section

When you initially access the Manage Applicant page, the Applicant Activity tab is active. Click the Contact Notes tab or the Applicant Data tab to view additional applicant data.

When you initially access the Applicant Activity tab, the Current Status section is active. Click the Interview Schedule/Evaluation link or the Expenses link to view additional applicant activity information.

Page-Level Actions



Take Action and Go	Use the Take Action field at the top of the page to perform actions that relate to the overall applicant record (without regard to any particular job opening). Select an action to perform, then click the Go button to initiate the action.
	In this context, the following actions are available: Add Applicant to New List, Add Applicant to Saved List, Add Person of Interest, Change Applicant Status, Forward Applicant, Link Applicant to Job, Manage Applicant Contracts, Merge as Source, Merge as Target, Pre-Employment Check, and Send Correspondence.
	See <u>Chapter 22, "Managing Applicants," Summary of Action Availability, page 604.</u>

Applicant Activity

This grid lists the job openings that the applicant is associated with. If the applicant applied without selecting a job opening, this application is included in the list as well.

Job Opening	Click the job opening link to access the Job Opening page for that job opening.			
Disposition	An applicant's disposition is the applicant's status with regards to a particular job opening. The values are the statuses that have been defined for the Recruitment Summary status area. These statuses track the progress of an applicant through the recruiting process.			
	Click the disposition link to access the Disposition Details page.			
Resume	Click to open a new window that displays the applicant's resume. The window contents depend on the resume format:			
	• If the resume is an attachment, the file opens in the new window.			
	• If the resume was entered into the Resume Text field in the application, the new window displays the Applicant Resume page.			
	If no resume exists for a particular applicant (for example, the applicant instead completed the work experience fields in the online application), then this column is blank. If none of the applicants in the grid have resumes, the entire Resume column is hidden.			

Take Action	Use the Take Action field in the Applicant Activity grid to perform actions that relate to the specific job application. (However, some of the available actions affect the overall applicant record.) When you select an action, the system immediately initiates it; you do not need to click a separate Go button.		
	In this context, the following actions are available: <i>Create Interview</i> <i>Evaluation, Create Salary Package Model, Manage Applicant Checklists,</i> <i>Manage Interviews, Prepare for Hire, Prepare Job Offer, Print Application</i> <i>Details, Reject Applicant,</i> and <i>Route Applicant.</i>		
	See <u>Chapter 22, "Managing Applicants," Summary of Action Availability, page 604.</u>		
Add New Disposition	Click this link to create a new row in the Applicant Activity grid. The system displays the Disposition Details page, where you select the disposition to assign to the new row and you optionally identify a job opening for the new row. If you do not identify a job opening, the job opening field for the new row displays the text <i>No Job Opening Selected</i> .		
	Note. Instead of using this link, you can use the <i>Link Applicant to Job</i> action to associate the candidate with a specific job opening. Using the <i>Link Applicant to Job</i> action provides the benefit of checking to see if the job opening has questions and, if it does, automatically generating an email requesting that the applicant use Candidate Gateway to answer the questionnaire.		
View Activity History and View Current Activities	Only one of these links is visible at a time; use them to toggle the Applicant Activity grid between showing only the applicant's current dispositions and showing both current and past dispositions.		
	When viewing activity history, the Applicant Activity grid displays the applicant's previous dispositions for those job openings where the disposition has changed over time. In this mode, the Applicant Activity grid does not have a Take Action field, the Job Opening and Disposition columns show only plain text, not links, and the Add New Disposition link is hidden.		

Reviewing Disposition Details

Access the Disposition Details page (on the Manage Applicant page: Applicant Activity tab: Current Status section, click the link in the Disposition column).

Manage Applican	t: Bob Montana		
Disposition D	etails: 020 Applied		
Applicant Name:	Bob Montana	Date Entered: 0	9/01/2004
ID:	1027		
		🗃 <u>Print Job Ope</u> r	ning
Posting Title:	Manager-Compensation/Benefits	Job Opening ID:	30023
Job Opening Status:	010 Open	Job Type:	Standard
Job Title:	Manager-Employee Relations	Job Code:	600060
Position Number:			
Business Unit:	GBIBU Global Business Institute BU	J	
Job Family:	KADMIN Administrative Support		
Save <u>Retu</u>	rn to Previous Page		
Job Opening ID:		pensation/Benefits	
*Status Code:		pensation/Benefits	
	020 Applied 🔽		
Status Reason:	•		
Status Date:	09/13/2004		
Contract Number:]Q	
Save Retur	n to Previous Page		

Disposition Details page

Note. Page appearance varies depending on the applicant's disposition. The basic version of the page pictured here appears for most dispositions.

Disposition-Specific Page Elements

Additional fields appear for the three following dispositions:

• Route

See Chapter 17, "Screening and Routing Applicants," Routing Applicants, page 473.

• Interview

See Chapter 18, "Interviewing Applicants," Making Final Recommendations, page 519.

• Offer

See Chapter 19, "Making Job Offers," Creating a Job Offer, page 533.

Most of the disposition-specific page elements are associated with just one of these dispositions. However, there is one element, the Disposition History grid, that is common to all three. This grid displays the status applicant's status change history for the routings, interviews, and offers. The first column in the grid displays the status type: *Route, Interview,* or *Offer*. Clicking the link changes the page to the page to the mode for the indicated recruiting area.

Edit Disposition Details

Use this group box to manually change an applicant's disposition when there is not a predefined recruiting process that applies a particular disposition. Although the date field appears to be enterable, the system overrides any date that you manually enter with the current date.

Important! The best practice is to use the predefined recruiting processes to set the applicant's disposition. For example, the actions that you use to manage interviews, reject applicants, prepare offers, and so forth all set the disposition automatically. If you update the disposition manually, take care not to override dispositions for key actions.

Reviewing Interview Schedules and Evaluations

Access the Manage Applicant page: Applicant Activity tab: Interview Schedule/Evaluation section (on the Manage Applicant page, click the Interview Schedule/Evaluation link under the Applicant Activity tab).

See Chapter 18, "Interviewing Applicants," Reviewing Applicant Interview Schedules and Evaluations, page 522.

Reviewing Applicant Expenses

Access the Manage Applicant page: Applicant Activity tab: Expenses section (on the Manage Applicant page, click the Expenses link under the Applicant Activity tab).

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Manage	Applicant: Bo	b Montan	a				
Name: Applicant ID:	Bob Montana		oplicant Type: DI Type:	External Applic	ant		
Contact: Phone: Email:	EMail 925/555-1212 <u>HCMGENUser1@a</u>	St	atus: ddress:	010 Active 678 Oakdale D Pleasanton, C			
🎢 🗏 Tak	e Action: Select A	ction	Go	Previous /	Applicant	Next Ap	plicant Applicant List
Applicant Activ	Applicant Activity Contact Notes Applicant Data						
Current Status	Interview Schedul	e/Evaluation	Expenses				
Expenses			Viev	v All 🗖 🛗 🛛 Fir	st 🚺 1 of	1 🕨 La	st
Expense	Amount	Currency	Charge Date	Expense Details			
Parking	\$10.00🛒	USD	10/19/2004	Expense Details	3	ĺ	Ĩ
+ Add New E	<u>xpense</u>		Total Exp	enses:	\$10.00	USD	

Manage Applicant page: Applicant Activity tab: Expenses section

Expenses

Expense Details	Click to access the Add Expenses page, where you can edit expense details for the expense.
Add New Expense	Click to access the Add Expenses page, where you can add expense details for a new expense.

Adding Applicant Expenses

Access the Add Expense page (on the Manage Applicant page: Applicant Activity tab: Expenses section, click the Add New Expense link or the Expense Details link).

Manage Applicant: Bob Montana			
Add Expen	se		
Expense Details			
*Expense Code:	Parking 🔽		
Expense Amount:	10.00 USD 🔍		
*Charge Date:	10/19/2004		
Business Unit:	GBIBU Global Business Institute BU		
Department:			
OK Cano	cel		

Add Expense page

Expense Code	Select an expense code, such as airfare, car rental, travel, or parking.
Expense Amount	Enter the expense amount and select a currency.
Charge Date	Enter the date on which the expense occurred.
Business Unit	Select the business unit to which the expense should be charged.
Department	Select the department to which the expense should be charged.

Managing Contact Notes

This section provides an overview of contact notes and discusses how to:

- Review contact notes and interested parties.
- Add contact notes.

Understanding Contact Notes

Use the Manage Applicant page: Contact Notes tab to review existing contact notes and add new contact notes.

System-Generated Contact Notes

Talent Acquisition Manager automatically creates contact notes when you generate letters or email during the recruiting process. For example, the system creates contact notes when you:

• Generate an interview letter.

- Create an offer letter.
- Forward an applicant.
- Generate ad hoc correspondence.

When creating notes for letters, the letter itself becomes an attachment to the note.

Manually-Created Contact Notes

Users can manually create notes (with optional attachments) to record interactions that have not been automatically captured. When creating a note, the user indicates the contact method by choosing from the values that your organization establishes on the Contact Methods page. For example, contact methods can include inbound or outbound phone calls, emails, faxes, and so on.

See Chapter 8, "Setting Up Additional Recruiting Definitions," Defining Contact Method Types, page 113.

Users can make contact notes public or private. Only the user who creates a private note can view that contact note. All recruiters and hiring managers can view public notes.

Page Name	Definition Name	Navigation	Usage
Manage Applicant page: Contact Notes tab	HRS_MANAGE_APP	Recruiting, Find Applicants, Find Applicants	Review and create contact notes for applicants.
		Click an applicant name link in the Search Results grid on the Find Applicants page.	
		Click the Contact Notes tab on the Manage Applicant page.	
Add Contact Note	HRS_APP_NOTES	In the Manage Applicant page: Contact Notes tab, click the Add Contact Note link or the Subject link for an existing note.	Add notes, with optional attachments, to record about interactions with an applicant.
Proxy Details	HRS_APP_PROXY_SBP	Click the Proxy Details link on the Add Contact Note page. This link appears only if the applicant was submitted through a recruitment service that is acting as the applicant's proxy.	View the name, phone number, and email address of the contact for the recruitment service that is acting as the applicant's proxy.

Page Used to Manage Contact Notes

Reviewing Contact Notes and Interested Parties

Access the Manage Applicant page: Contact Notes tab (on the Manage Applicant page, click the Contact Notes tab).

Manag	e Applicant:	Bob Monta	ana			
Name: Applicant ID Contact: Phone: Email:	Bob Montana 1027 EMail 925/555-1212 HCMGENUser1	F	Applicant Type: POI Type: Status: Address: s.oracle.com	External A 010 Active 678 Oakda Pleasanto		
Applicant Ar		es Applicant		Go Pi	revious Applicant I <u>N</u>	<u>Vext Applicant Applicant List</u>
Contact His	tory	<u>Customiz</u>	e <u>Find </u> View All	🗖 📔 First	1-3 of 3 🖸 Last	1
Owner ID	Sender	Contact Date	Subject		Delete	
KU0007	Betty Locherty	08/19/2009	Offer Letter		Î	
KU0007	Betty Locherty	08/19/2009	Directions to O	ffice	Î	
KU0007	Betty Locherty	08/19/2009	Interview Letter	[Î	
+ Add Con Interested F		Email				
					e	
Stephanie M	assey	steph	anie.massey@gl	oi.com	Î	
+ Add Inter	ested Parties					

Manage Applicant page: Contact Notes tab

Contact History

This grid lists the contact notes for an applicant. System-generated notes and manually-created notes appear together in the grid. Private notes are hidden from all users other than their creators.

Owner ID and Recruiter	These columns display the user ID and name of the person who created the
Name	note. For system-generated notes, these columns display information about
	the person who performed the action that triggered the note creation.

Subject	Displays the subject of the communication. For example, if the system created the contact note when a recruiter used the <i>Forward Applicant</i> action, the subject text is the subject that the recruiter entered in the forwarding message.
	Contact notes for letters have the subject <i>Interview Letter</i> , <i>Offer Letter</i> , or <i>Application Letter</i> .
	Click the subject text to access the full text of the communication in the Add Note page or the Forward Applicant page.
Add Contact Note	Click to access the Add Note page, where you can add a new contact note.

Interested Parties

Use this group box to enter the names and email addresses of interested parties. When you send correspondence to an applicant, you can select the Include Interested Parties option on the Send Correspondence page to send email correspondence to the persons that you list here.

See Chapter 22, "Managing Applicants," Sending Ad Hoc Correspondence, page 641.

Adding Contact Notes

Access the Add Contact Note page (on the Manage Applicant page: Contact Notes tab, click the Add Contact Note link or click the Subject link for an existing contact note).

Add Con	tact Note		
Name: Applicant ID: Contact: Phone: Email:	Bob Montana 1027 EMail 925/555-1212 HCMGENUser1@ap60	Applicant Type: Status: Address: 23fems.us.oracle.com	External Applicant 010 Active 678 Oakdale Drive Pleasanton, CA 94588
Save & Return			
Author:	Betty Locherty d: Outbound Email Directions to Office	Contact Date: Note Audience	08/19/2009 Public
Attachments		Customize F	ind View All 🖾 First 🚺 1 of 1 🖸 Last
Filename		Description	
	to Headquarters.doc		
+ Add Attach Save & Return			

Add Contact Note page

Proxy Details	This link appears only if the applicant was submitted through a recruitment service. Click the link to display the Proxy Details page.
Email	Click this link to open the Send Correspondence page so that you can send email or a letter to the applicant.
	See <u>Chapter 22</u> , "Managing Applicants," Sending Correspondence and <u>Recruitment Letters, page 635.</u>

Contact Method	Select a contact method, choosing from the methods that are defined on the Contact Method page. See <u>Chapter 8, "Setting Up Additional Recruiting Definitions," Defining</u> <u>Contact Method Types, page 113.</u>
Note Audience	Select <i>Public</i> or <i>Private</i> to control who can see the note. Only the user who creates a private note can view that contact note. All recruiters and hiring managers can view public notes.
Subject	Enter a subject. The subject that you enter appears in the Contact History group box on the Manage Applicant page: Contact Notes tab.
Notes	Enter the text of the note.

Attachments

Use this group box for attachments that pertain to the interactions that you had with the applicant.

Click the Add Attachment link to display a browser window where you can search for the attachment to upload. Click the Delete Attachment link to remove the selected attachment from the note.

Reviewing Applicant Data

This section discusses how to:

- Review the application summary for an applicant.
- Review application details.
- Review questionnaire details.

Page Name	Definition Name	Navigation	Usage
Manage Applicant page: Applicant Data tab	HRS_MANAGE_APP	Recruiting, Find Applicants, Find Applicants Click an applicant name link in the Search Results grid on the Find Applicants page. Click the Applicant Data tab on the Manage Applicant page.	View an applicant's applications, resumes, contact information, and eligibility and identity information.
Application Details	HRS_APP_PROFILE	Click the Application icon on the Manage Applicant page: Applicant Data tab: Applications and Resumes section.	Review application details, including the applicant's resume, preferences, and qualifications.
View Questionnaire	HRS_APP_QSTN_RSLT	Click the View Questionnaire link on the Application Details page.	Review an applicant's answers to screening questions that the applicant answered while preparing the application in Candidate Gateway.

Pages Used to Review Applicant Data

Reviewing the Application Summary for an Applicant

Access the Manage Applicant page: Applicant Data tab: Applications & Resumes section (click the Applicant Data tab on the Manage Applicant page).

Manage Applicant: Bob Montana					
Name: Applicant ID: Contact: Phone: Email:	Bob Montana 1027 EMail 925/555-1212 HCMGENUser1@	Applicant POI Type: Status: Address: ap6023fems.us.oracle.	010 Acti 678 Oal	l Applicant ive kdale Drive nton, CA 94588	
🎢 🗐 Take /	Action:		GO	Previous Applicant INe	ext Applicant Applicant List
Applicant Activity Applications & Re Applications		act <u>Verification</u>	Eliqibility & Ide	ntity First C 1-4 of 4 D Last	
Resume Title		Last Updated	Last Updated By	Application	
HRIS Resume		09/12/2004 1:02PM	SAMPLE		
Manager Resume	9	09/13/2004 8:21PM	SAMPLE		
Analyst Resume		09/13/2004 8:24PM	SAMPLE		
Finance Resume		09/13/2004 8:34PM	SAMPLE		
+ Add Applicati	on		1		1

Manage Applicant page: Applicant Data tab: Applications & Resumes section

Note. The Contact, Verification, and Eligibility & Identity sections under the Applicant Data tab correspond to the equivalent sections on the Add New Applicant page.

See Chapter 15, "Entering Applicant Data," page 349.

Applications

Use this group box to view all of an applicant's applications.

Application	Click the icon in this column to open an existing application in the Application Details page, where you can view and edit the application.
Add Application	Click to access the Application Details page in add mode so that you can add a new application for the applicant.

Reviewing Application Details

Access the Application Details page (click the Application icon on the Manage Applicants page: Applicant Data tab: Applications and Resume section).

The pages that you use to review and edit applicant data are the same as those you use to add new applicant data.

See Chapter 15, "Entering Applicant Data," page 349.

When you are reviewing an existing application (rather than creating a new one), this additional page element is available:

View Questionnaire This link appears in the Job Openings grid. Click to access the View Questionnaire page, where you can review the applicant's answers to questions to screening questionnaires that the applicant completed in Candidate Gateway.

Reviewing Questionnaire Details

Access the View Questionnaire page (click the View Questionnaire link on the Application Details page).

Manage Applicant: Rosemary Wright						
View Questionnaire						
Rosemary V	Vright					
Applicant ID:	300138					
Job Opening:	500395	Eldercarers I	Needed in Various	s suburi	bs of Dallas (Ref:50)0395)
Question:	1004	Are you willin	ng to work overtim	ie perio	dically?	
Answers						
1027	10					
1037 Y	′es				\checkmark	
Question:	1034				protocols you would nit in a rural hospita	
Answers						
	 Treatment protoco Privacy protocols. Hiring protocols. Additional adminis).			
Evaluators f	or the Open Ended Que	estion				
		ļ	Average Review P	oints:		
Evaluator R	esponse					
EmplID	Name			Points	for Answer	
KU0007	Betty Locherty					
Apply	Save Car	ncel				

View Questionnaire page

This page shows questions that the applicant answered online.

For each multiple-choice question, the page displays the possible answers; a selected check box indicates the applicant's answer.

For each open-ended question, the page displays the question, the applicant's answer, and a grid that lists the evaluators for the answer. Evaluators can use this grid to award points to the answer.

Important! This page displays does not display questions from the Prescreening and Online Screening levels.

Linking Applicants to Job Openings

This section provides an overview of how to link applicants to job openings and discusses how to link applicants to job openings.

Understanding How to Link Applicants to Job Openings

If you find an applicant who is qualified for a specific job opening and should be considered, you can link the applicant to that job opening.

Establishing Links Between Applicants and Jobs

The link between an applicant and a job is what causes the job opening to appear on the Manage Applicant page and the applicant to appear on the Job Opening page.

Applicants are automatically linked to job openings when they apply for the job using Candidate Gateway or when a recruiter uses the Application Details page to add job openings to the applicant's application.

You can also link applicants to jobs by invoking the *Link Applicant to Job* action. When you link an applicant to a job using this method, the system displays the Link to Job Opening page. Use this page to specify one or more job openings to which the applicants is to be linked.

Questionnaires in Linked Jobs

When a user links an applicant to a job opening either by using the *Link Applicant to Job* action or by adding the job opening on the Application Details page, the system determines whether the job opening includes screening questions. If it does, the system sends an email informing the applicant of the link and asking the applicant to use Candidate Gateway to answer the questions. A link in the email takes the applicant to Candidate Gateway, where the applicant can sign in to an existing account or create a new account that will be automatically be associated with the existing applicant record.

The system also creates a contact note with a record of the outgoing email.

When multiple job openings are added to the application at once, the system sends only one email per applicant.

The request to answer questions is sent only to applicants who have provided an email address. Applicants without email addresses are still linked to the job opening, but no notification can be sent. When you link applicants to job openings using the *Link to Job Opening* action, the Link to Job Openings page displays information about which applicants do not have email addresses and therefore will not receive the notification.

When the candidate signs on to Candidate Gateway, the Welcome page displays a notification with the subject *Questionnaire Completion <job opening ID>*. The applicant can click the notification subject to complete an application for the job opening or openings; the application automatically includes the associated questions.

Because submitted applications are never editable in Candidate Gateway, the applicant will *not* be able to answer questions in an existing application. Instead, the applicant must create a new application, in effect reapplying for the job opening that is already linked to the applicant's record. As a result, an applicant who uses Candidate Gateway to complete the questionnaire ends up with two applications for the same job opening, and the applicant's name appears twice on the Manage Job Opening page.

Important! Be sure the text of your email notification gives the applicant clear instructions for reapplying.

The Recruiter Alerts pagelet (part of PeopleSoft HCM Portal Pack) includes an alert that displays the number of applicants who have not completed questionnaires for the job openings for which the user is on the recruiting team. Users can click the number to access the Questionnaire Request page, which lists each outstanding request and enables the user to send reminder notifications to selected applicants.

See *PeopleSoft HRMS Portal Pack 9.1 PeopleBook*, "Using HRMS Portal Pack Pagelets," Viewing Recruiter Alerts for Talent Acquisition Manager.

Pages Used to Link Applicants to Job Openings

Page Name	Definition Name	Navigation	Usage
Link to Job Opening	HRS_GACT_RCM_STS	Recruiting, Find Applicants, Find Applicants Search for applicants, then in the Search Results grid, select <i>Link Applicant to Job</i> in the Take Action field or the Group Action field. (This action is also available on other pages.)	Link an applicant to a job opening.

Linking Applicants to Job Openings

Access the Link to Job Opening page (on the Find Applicants page, select *Link Applicant to Job* in the Take Action field for an applicant).

Link to Job Opening			
Applicants to be linked.	Customize 🖾 First 🚺 1-3 of 3 🕨 Last		
Applicant	Name		
11	Yvonne Smith		
17	Jim Furlong		
18	Theresa Kelsey		
Enter Disposition Inform	nation		
Status Reason:	s Reason:		
Enter Job Openings			
Job Opening ID	Posting Title		
30005	Analyst-Business		
+ Add Job Opening			
Submit Cancel			
Applicants Without Email Customize Pirst I of 1 Last			
Applicant ID N	lame		
11 Y	Yvonne Smith		

Link to Job Opening page

Applicants To Be Linked

This grid lists the applicants that you selected when you initiated the Link Applicant to Job action.

Enter Disposition Information

Use this group box to enter the initial disposition for the applicants with regard to the job openings to which they are being linked.

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Status Code and Status Reason	Select a status code (disposition) and status reason. The default disposition is the one with the identifier 015. The delivered label for this disposition is 015 Linked.
	If you are linking applicants to a job that has a questionnaire, change the disposition to status code 019. The delivered label for this disposition is 019 <i>Linked Questionnaire</i> . This disposition indicates that the applicant has not completed the questionnaire, which can only be completed by an applicant who submits an application using Candidate Gateway.
	The system allows you to choose any disposition, but using the 019 Linked Questionnaire disposition for a job opening that doesn't have a questionnaire, or using any other disposition for a job opening that does have a questionnaire, causes the system to issue a warning when you click the Submit button.
Status Date	Enter the date that the applicant is linked to the job. The default is the current date.

Enter Job Openings

Select the job openings to which you want to link the applicant. Security prevents you from adding any job openings that you do not already have permission to access.

See <u>Chapter 7, "Setting Up Recruiting Roles and Security," Understanding Row-Level Security for</u> <u>Recruiting, page 99.</u>

If the job opening is associated with any questions, the system sends the applicant an email with directions for signing on to Candidate Gateway and submitting an application for the job; the online application automatically includes the questions.

Applicants Without Email

This grid lists applicants who do not have an email address in the system.

These applicants will not receive an email notifying them that they need to complete questionnaires for newly-linked job openings.

Printing Application Details

This section provides an overview of how to print application details and discusses how to:

- Print a single application.
- Print multiple applications.

Understanding How to Print Application Details

To print application details for one or more applicants, use the *Print Application Details* action. This action is available in several contexts:

- The Search Results section of the Find Applicants page (individual or group action).
- The Manage Applicants section of the Job Opening page (individual or group action).
- The Applicant Activity grid on the Manage Applicant page (one application only).

When you select the *Print Application Details* action for a single application, the system displays a read-only Application Details page that is formatted for printing. Data appears in collapsible sections. Initially, all sections are expanded, but you can selectively collapse sections before printing to control the amount of detail included in the printed output.

When you select the *Print Application Details* action for a group, the system displays the Print Application Details page. This is a standard run control page such as the ones you use to generate other reports. Use this page to submit a request to PeopleSoft Process Scheduler, which then generates the output for each selected application. When printing multiple applications, the system always includes all of the sections in the report.

Page Name	Definition Name	Navigation	Usage
Application Details (printer- friendly)	HRS_APP_PRINT_PAGE	• Recruiting, Find Applicants, Find Applicants	Displays application data in one long printer-friendly page.
		In the Search Results grid, select <i>Print</i> <i>Application Details</i> in the Take Action field.	
		(This action is also available on other pages.)	
		• On the Find Applicants page, click an applicant name to access the Manage Applicant page, then click the Applicant Data tab.	
		Click the Application icon to access the Application Details page, then click the Print Application Details link.	

Pages Used to Print Application Details

Page Name	Definition Name	Navigation	Usage
Print Application Details	HRS_RUN_HRS036	Recruiting, Find Applicants, Find Applicants Search for applicants, then in the Search Results grid, select <i>Print Application</i> <i>Details</i> in the Group Action field. (This action is also available on other pages.)	Submit a PeopleSoft Process Scheduler request to print all of the selected applications in batch.

Printing a Single Application

Access the Application Details (printer-friendly) page (select the *Print Application Details* action in the Take Action field in the Search Results grid on the Find Applicants page).

Application I	Details		Return to Previous Page	Print this Page
👻 General Informatio	n			
Display Name:	Justin Curtis			
Applicant ID: Applicant Type:	100016 External Applicant			
Applicant Status	010 Active			
Job Opening ID:	10041	Web Develop	er	
🔻 Resume Text				
Resume Title: Language Code: Resume Text:	j_curtis_resume_ ENG	1		
Justin Curtis 4460 H	acienda Drive Pleas	anton CA 9458	3	
🗢 Contact Informatio	n			
Name Prefix:				
First Name:	Justin			
Middle Name:				
Last Name:	Curtis			
Name Suffix:				
Address:				

Application Details (printer-friendly)

Note. Only part of the page is shown here.

This page displays all of the application data in a printer-friendly format. Scroll to review all of the data.

opening. I	Click this button to open a standard print dialog box and print the job opening. If you collapse any sections before printing, those sections appear collapsed on the final printout.
	The final print output is further optimized for printing and thus differs from what you would get if you simply used your browser's print command. For example, the navigation links at the top of the page do not appear on the printout, and the section titles are rendered as dark text rather than as white text in a colored bar.

Printing Multiple Applications

Access the Print Application Details page (select the *Print Application Details* action in the Group Action field under the Search Results grid on the Find Applicants page).

Print Application Details			
	RUN_HRS036_20090531122526 English	<u>Report Manager</u> <u>Return to Previous Page</u>	Process Monitor Run

Print Application Details page

The system provides a run control ID for the Print Application Details process.

Select the language for the printouts, then click the Run button to generate the Application Details (HRS036) SQR report.

Sending Correspondence and Recruitment Letters

This section provides overviews of the Send Correspondence action and of context-specific recruitment letters, then discusses how to:

- Send ad hoc correspondence.
- Find email addresses.
- Generate batch recruitment letters.

Understanding the Send Correspondence Action

This overview describes the Send Correspondence action, which you use to produce ad hoc email and letters for applicants.

Send Correspondence

Use the Send Correspondence action to send the following types of correspondence:

- An email with message text that you manually enter.
- An email with message text that the system generates based on a template that you select.
- A letter that the system generates based on a template that you select.

Recruiting Solutions uses Oracle Business Intelligence Publisher (BI Publisher) to generate recruitment letters. The BI Publisher is a template-based reporting solution that separates the data extraction process from the report layout and allows the reuse of extracted application data into multiple report layouts.

The Send Correspondence action is available for a single applicant from the Manage Applicant page, and it is available for one or more applicants on the Find Applicants page, the Job Opening page, and the Applicant List page.

Note. You cannot use this method to send offer letters or interview letters, which require the context of their specific pages.

Email Generation

When you invoke the Send Correspondence action, the Send Correspondence page appears with *Email* as the default contact method. You can enter freeform message text, or you can select from a list of available templates. If you select a template, the system creates the message text, merging applicant data into the template as necessary. You can preview the system-generated message, but you cannot modify it.

Both template-based and freeform email messages require you to enter the email subject. You can optionally add attachments to the email as well.

Note. To support freeform text messages, the system applies the delivered HRS_EMAIL_GENERIC template when no other template is selected. As delivered, this template places a greeting before your message text and a sign-off after your message text. To remove this wrapper, you can modify the template.

Letter Generation

If you change the contact method to *Letter*, you must select a letter template. Once you select a template, the Generate button appears. Clicking this button generates a merged letter and opens it in a new browser window so that you can print and send it. You can optionally preview the merged letter before generating it.

When you generate a letter, it is up to you to print and send it. Letters that you generate using Send Correspondence are *not* added to the queue of letters for the HRS Letter Generation process (HRSLETTER).

Contact Notes Created by Send Correspondence

When you send email or generate a letter using the Send Correspondence action, the system saves the message as a contact note.

You can view the note on the Manage Applicant page: Contact Notes tab. The note is designated as public or private based on the setting you choose when you create the correspondence. Anyone can view public notes, but only the sender can view private notes.

For email correspondence, the email subject becomes the note subject. When you click the subject to view the note details, the correspondence appears in the Send Notification page. You can modify the correspondence (though you cannot change the contact method) and then resent the correspondence. For template-based email, you can change the subject, the attachments, and the Cc and Bcc recipients, but you cannot change the template selection, nor can you modify the message.

For letter correspondence, the default note subject is *Application Letter*. When you click the subject to view the note details, the Add Contact Note page appears, and the letter appears as an attachment to the note. You can edit the note as necessary, including replacing the attachment if you modified the generated letter before printing and sending it.

Note. If you do not end up sending the letter, you should manually delete the contact note from the applicant's record. If you modify the letter before sending it, you should update the contact note accordingly.

Template Selection

The Send Correspondence action uses BI Publisher for PeopleSoft templates for both email and letter correspondence. The templates that are available for selection are those with the HRS_APP_LETTERS report definition.

See PeopleTools: BI Publisher for PeopleSoft PeopleBook

Understanding Context-Specific Recruitment Letters

This overview discusses the generation and delivery of context-specific recruitment letters.

Types of Recruitment Letters

PeopleSoft Talent Acquisition manager enables you to generate context-specific recruitment letters during these recruiting activities:

- Entering or reviewing application information on the Application Details page
- Scheduling applicant interviews on the Interview Schedule page.
- Preparing job offers on the Prepare Job Offer page

The pages where you perform these recruiting activities all display a Letter field that you use to select a letter template.

Batch Letter Generation Vs. Manual Letter Generation

All of the pages that support recruitment letters include a Generate Letter link that you click to manually generate the letter. The system merges applicant data into the selected template and opens the resulting letter in a new browser window.

If you select a letter but do not generate it manually, the system automatically places the letter in a queue to be processed by the HRS Letter Generation (HRSLETTR) Application Engine process.

When a letter has been placed in the queue but has not yet been processed, manually generating the letter removes it from the queue. Because manually generating a letter prevents it from being processed by the HRS Letter Generation process, the person who manually generates the letter is responsible for delivering the letter.

Note. Applicant letters that you send from the Send Correspondence page are never added to the queue for the HRS Letter Generation process.

When you manually generate a letter, the system automatically creates a contact note with the letter as an attachment. The HRS Letter Generation process, on the other hand, creates a single file with all of the letters that were generated, so individual letter documents do not exist, and the system does not create a contact note or associate an attachment with the applicant record.

Letter Delivery

After generating a letter manually, users have two delivery options: hard copy and email.

For hard copy delivery, users can print the letter from the browser window where the letter is displayed. Users can also save the letter to a local disk and print it from there. The default file format for the generated letter is .rtf (rich text file), which is compatible with most word processing applications.

For email delivery, an Email Applicant link enables users to access the Send Correspondence page with the generated letter already attached. Users can enter their own email message text before sending. If there is no email address for the applicant, the system displays a warning.

Note. Only interview and job offer letters can be emailed. The Application Details page does not have the Email Applicant option.

Clicking the Email Applicant link before generating the letter displays the Send Correspondence page without any attachments. Although you can select letter templates from the Send Correspondence page, the available templates are not context-sensitive: choices are always the same as those on the Application Details page, even if you access the Send Correspondence page from the Interview Schedule page or the Prepare Job Offer page.

Modified Letters and the Upload Option

To modify a template-based letter, you must generate it, save it locally, and make your changes to the local copy. To ensure accurate records, you must then upload the modified document to the system.

For interview letters and offer letters, the system provides an Upload Letter link that you can click to upload the modified document to the correct context. If you subsequently click the Email Applicant link, the system automatically attaches the modified letter (rather than the original) to the email.

Contact Notes

Contact notes, which appear on the Manage Applicant page: Contact Notes tab, are automatically created for recruitment letters that you generate individually (The HRS Letter Generation process does not create contact notes for letters that it produces in batch.) By default, the automatically-generated contact notes are designated as public, but you can make a note private so that only the sender can see it.

The system generates contact notes when:

• You generate a recruitment letter.

If you generate a letter but do not send it, you should manually delete the contact note from the applicant's record.

• You upload a recruitment letter.

The Application Details page does not have an upload link. If you modify an application letter, you should manually replace the attachment in the related contact note.

• You email a recruitment letter.

If you perform multiple letter-related actions, the applicant ends up with multiple contact notes that refer to the same interaction. For example, if you generate a letter, then upload a modified letter, then email the modified letter, the system creates three separate contact notes related to this one letter. To eliminate redundant contact notes, delete these extra contact notes manually on the Manage Applicant page: Contact Notes tab.

When you email a letter to the applicant, the email subject becomes the contact note subject. When you generate or upload a letter, the default subject text describes the letter context: *Application Letter, Interview Letter, or Offer Letter.*

Clicking the subject of a contact note opens a page that displays the note details; the actual letter appears as an attachment to the note. You can edit the note as necessary. If the contact note is for an email, the note details appear in the Send Notification page, where you can modify the email and then resend it.

Letter Selection

Recruitment letters use BI Publisher for PeopleSoft templates. The templates that are available for selection are those with the following report definitions:

- Templates from the HRS_APP_LET report definition are available from the Application Details page.
- Templates from the HRS_INT_LET report definition are available from the Interview Schedule page.
- Templates from the HRS_OFF_LET report definition are available from the Prepare Job Offer page.

Delivered Letter Templates

Talent Acquisition manager delivers the following recruitment letter templates:

Report Definition	Template ID	Template File	Purpose
HRS_APP_LET	HRS_APP_LETTER_ACQ	LTRACQxml.rtf	Acknowledges receipt of applicant's resume.
HRS_APP_LET	HRS_APP_LETTER_ANO	Ltranoxml.rtf	Notifies applicant of no current job openings.
HRS_APP_LET	HRS_APP_LETTER_CR1	LTRCR1xml.rtf	Thanks applicant for interest in company and that their qualifications are being reviewed.

Report Definition	Template ID	Template File	Purpose
HRS_APP_LET	HRS_APP_LETTER_IR	LTRIR.rtf	Interview rejection letter.
HRS_APP_LET	HRS_APP_LETTER_LAQ	Ltrlaqxml.rtf	Thanks applicant for interest in company and that their qualifications are being reviewed.
HRS_INT_LET	HRS_INT_LETTER_IS1	LTRIS1xml.rtf	Notifies applicant of scheduled interview date and time.
HRS_INT_LET	HRS_INT_LETTER_IS2	LTRIS2xml.rtf	Notifies applicant of scheduled interview date and time.
HRS_INT_LET	HRS_INT_LETTER_IS3	LTRIS3xml.rtf	Notifies applicant of scheduled interview date and time.
HRS_OFF_LET	HRS_OFF_LETTER_OF1	LTROF1xml.rtf	Notifies applicant of offer and compensation package.
HRS_OFF_LET	HRS_OFF_LETTER_OF2	LTROF2xml.rtf	Notifies applicant of offer and compensation package.

See Also

Chapter 15, "Entering Applicant Data," Entering Application Details, page 363

Chapter 18, "Interviewing Applicants," Scheduling Interviews, page 481

Chapter 19, "Making Job Offers," Creating Job Offers, page 529

PeopleTools: BI Publisher for PeopleSoft PeopleBook

Pages Used to Send Correspondence and Recruitment Letters

Page Name	Definition Name	Navigation	Usage
Send Correspondence	HRS_SEND_CRSP	Recruiting, Find Applicants, Find Applicants Search for applicants, then in the Search Results grid, select <i>Send Correspondence</i> in the Take Action field or the Group Action field. (This action is also available on other pages.)	Send ad hoc letters and emails to applicants. Letters must be template-based; email can be freeform or template-based.

Page Name	Definition Name	Navigation	Usage
Send Correspondence Preview	HRS_FWRD_APP_PRVW	Click the Preview button on the Send Correspondence page when it is configured to send a freeform email.	Preview the content of a freeform email. You must return to the Send Correspondence page before sending the email. Note. The default template that the system uses for freeform email adds text before and after the message that you create; use this page to see your
			message with the template text applied.
Find Email Address	HRS_FND_EMAIL_ADDR	Click the Find link on the Send Correspondence page.	Search for and select employees to whom you want to forward applicants.
Generate Recruitment Letters	HRS_RUN_LETTERS	Recruiting, Administration, Generate Recruitment Letters, Generate Recruitment Letters	Run the process that generates letters from the recruiting letter queue.

Sending Ad Hoc Correspondence

Access the Send Correspondence page (select the *Send Correspondence* action in the Take Action or Group Action field on the Find Applicants, Manage Applicant, or Job Opening page).

Send Correspondence Preview Send Cancel		
Message Type and	l Method	
*Contact Method:	Email	
Letter:		
Recipient Informat	tion	
To:	Fran Thompson, Jack Sophans	
Cc:	HCMGENUser1@ap6023fems.us.oracle.com	
Bcc:	년 Find	
	Include Interested Parties	
Sender Informatio	n	
From:	Betty Locherty	

Send Correspondence page (1 of 2)

Message		
*Subject: *Access: Message:	Public	7 (
Attachments		
	ave been added to this Correspondence	
+ Add Attachmen	<u>t</u>	
Preview	Send Cancel	

Send Correspondence page (2 of 2)

Message Type and Method

Contact Method	Select <i>Email</i> or <i>Letter</i> .
	The default value is <i>Email</i> . In this mode, the page shows standard email fields.
	If you select <i>Letter</i> :
	• In the Recipient Information section, the Cc and Bcc fields are hidden.
	• In the Message section, the Subject and Message fields are hidden, and a Notes field appears instead.
	• The Sender Information and Attachments sections are hidden entirely.
Letter	Select a letter template to use. This field is optional when you send email and required when you send a letter.

Recipient Information

То	This field appears for both email and letter correspondence. It displays the names of the applicants to whom you are sending correspondence and is not editable.
	If you are sending the correspondence to multiple applicants, all names appear together. However, the system sends separate correspondence to each applicant: template-based messages are generated separately for each recipient, and the applicants do not see each other's names in the To field of the email they receive.
Cc, Bcc, and Find	These fields appear only for email correspondence.
	By default, the sender's preferred email address appears in the Cc field, and the Bcc field is empty. You can edit these fields directly to add or remove recipients, or you can look up recipients who are employees by clicking the Find link to access the Find Email Address page.
	See <u>Chapter 22</u> , "Managing Applicants," Finding Email Addresses, page 646.
Include Interested Parties	Select this check box if you want the people listed as interested parties for the applicant to receive a copy of this email. An applicant's interested parties are listed on the Manage Applicant page: Contact Notes tab. The system sends the interested parties copies of the correspondence, but does not display their names or email addressed on this page.
Include Interested Parties	646. Select this check box if you want the people listed as interested parties for the applicant to receive a copy of this email. An applicant's interested parties are listed on the Manage Applicant page: Contact Notes tab.

Sender Information

If the Contact Method is *Email*, the From field in this section displays the sender's name.

If the Contact Method is Letter, this entire section is hidden.

Message	
Subject	This field appears only for email correspondence.
	Enter the email subject. This field is required for email correspondence (whether freeform or template-based).
Access	This field appears for both email and letter correspondence.
	Select <i>Public</i> to allow any user to view the contact note for this correspondence.
	Select <i>Private</i> to allow only the sender access to the contact note.

Message	This field appears only for email correspondence. For freeform email, enter the text of the email message. If you select a template, this field disappears until you click the Preview button, at which point the field displays the non-editable template-based message text.
	Note. To support freeform text messages, the system applies the delivered HRS_EMAIL_GENERIC template when no other template is selected. As delivered, this template places a greeting before your message text and a sign-off after your message text. If your organization is using the delivered template, your message should not duplicate the greeting or sign-off text from the template.
Notes	This field appears only for letter correspondence. Enter any comments that should be saved in the contact note that the system creates when it generates the letter.

Attachments

If the Contact Method is *Email*, use this section to add attachments to and remove attachments from the email.

If the Contact Method is Letter, this entire section is hidden.

Action Buttons

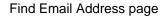
Preview	Click to preview the email or letter.
	When you preview a letter or a template-based email, the message text appears directly on the Send Correspondence page. If you are not satisfied with what you see, select a different letter (or clear the Letter field) to make changes.
	When you preview a freeform email, the message text appears on the Send Correspondence Preview page. You can return to the Send Correspondence page without sending.
Send	Click to send the email and create the associated contact note.
	This button appears only when the Contact Method is <i>Email</i> .
Generate	Click to generate a letter and display it in a new browser window. The system creates the associated contact note immediately. If you don't print and send the letter, be sure to delete the contact note.
	When you generate the letter, the original browser window returns to the page from which you invoked the Send Correspondence action.

Resend	This button appears only if you access the page from the applicant's list of contact notes (under the Contact Notes tab on the Manage Applicant page). Click to resend email correspondence if there were delivery issues or if you have modified the email. You can always modify the subject, the attachments, and the Cc and Bcc recipients before resending, but you can modify the message text only for freeform correspondence.
Cancel	Click this button to return to the previous page without sending the correspondence.

Finding Email Addresses

Access the Find Email Address page (click the Find link on the Send Correspondence page or the Forward Applicant page).

Find Email Address						
Find Employees						
Fin	d Employees					
Emp	ployee ID:					
Nan	ne:	Melis	ssa			
	Search	(Cancel			
Se	arch Results				Customize View All 🗖 First 🗹	1-4 of 4 D La
	EmplID		Name	Email Type	Email Address	Preferred
	ADCRM1002		Melissa Richards	Home	HCMGENUser1@ap6023fems.us.oracle.com	Y
	FAPK0318		Melissa Lee	Campus	HCMGENUser1@ap6023fems.us.oracle.com	Y
	FGCWR01		Melissa Moore	Business	HCMGENUser1@ap6023fems.us.oracle.com	Y
	KUD004		Melissa Rosenberg	Home	HCMGENUser1@ap6023fems.us.oracle.com	Y
Select All Deselect All Add Selected						



Find Employees

Enter a full or partial employee ID or name and click Search to display the search results.

Search Results

This group box displays the search results. Select one, several, or all employees in the search results and click the Add Selected button to add their email addresses to the appropriate fields on the page from which you initiated the email address lookup.

Preferred

Indicates whether this is the preferred email address for the employee. If an employee has multiple email addresses, the system lists all email addresses and indicates which email address is the preferred email address so that you can select the email address that is most appropriate.

Generating Batch Recruitment Letters

Access the Generate Recruitment Letters page (Recruiting, Administration, Generate Recruitment Letters, Generate Recruitment Letters).

Generate Recruitment Letters				
Run Control ID: PS Language: English Specified C Recipient's	<u>Report Manager</u>	Process Monitor	Run	

Generate Recruitment Letters page

Language	Choose a language and select the Specified option to generate all letters using the language that you explicitly select.
	Select the Recipient's option to print each letter in the preferred language of its recipient. In this case, the language that you select in the Language field is used only when there is no record of the recipient's preferred language.
Run	Click to run the HRS Letter Generation job (HRSLETTER) using PeopleSoft Process Scheduler.

Note. If you select *Printer* in the Type field on the Process Scheduler Request page, you must enter the URL address for your printer in the Output Destination field.

Forwarding Applicants

This section provides an overview of applicant forwarding and discusses how to:

- Forward applicants.
- Preview the email.

Understanding Applicant Forwarding

Recruiters can forward applicants to one or more persons to enable those persons to review the applicant. When recruiters forward an applicant, the system sends a notification (HRS_FORWARD_APPLICANT) to the people that the recruiter specifies on the Forward Applicant page.

Forwarding an applicant is similar to routing an applicant. However, when you forward an applicant, the system does not change the applicant disposition. The system does, however, add a contact note to the Manage Applicant page: Contact Notes tab.

When you forward an applicant action, the applicant's resume is attached to the notification email. If you forward an applicant who has multiple applications, only the resume from the most recently created application is sent. If the most recent application does not have a resume, there is no attachment.

Attached resume files are delivered in their original file format. If the resume text was pasted into the Resume page rather than uploaded as an attachment, the resume text is sent as a text (.txt) file, which does not retain formatting. If an application has both online resume text and a file attachment, only the file attachment is sent.

Page Name	Definition Name	Navigation	Usage
Forward Applicant	HRS_FWRD_APPL	Recruiting, Find Applicants, Find Applicants	Forward applicants.
		Search for applicants, then in the Search Results grid, select <i>Forward Applicant</i> in the Take Action field or the Group Action field. (This action is also available on other pages.)	
Forward Applicant Preview	HRS_FWRD_APP_PRVW	Click the Preview button on the Forward Applicant page.	Preview a message.

Pages Used to Forward Applicants

Forwarding Applicants

Access the Forward Applicant page (on the Find Applicants page, select *Forward Applicant* in the Take Action field for an applicant).

Forward	d Applicant		
		you are sending this information. Select the "Send" review" button to preview the email.	
Preview	Send Cancel		
Forward App	olicant	Customize View All 🗖 First 🚺 1-4 of 4 D	Last
Applicant Nan	ne	ID	
Katrina Brow	n	277	
Diane Ironsio	le	280	
Otto Waalkes	i	3	
Jim Furlong		17	
Recipient Inf	formation		
*To:	karen.brown@gbi.com	رچ) Fin	d
Cc:		 ها Fin	-
Bcc:		ریا۔ Ein	-

Forward Applicant page (1 of 2)

Sender Informa	ation	
From:	Betty Locherty	
Message		
message	What do you think?	
*Subject:	What do you think?	
*Access:	Public	
Message:	Take a look at these applicants and let me know what you think.	
L		
Preview	Send Cancel	

Forward Applicant page (2 of 2)

Page-Level Actions

Preview

Click to access the Forward Applicant Preview page, where you can preview the email before you send it. Before you can preview the message, you must enter an email address and a message subject.

Forward Applicant

This group box displays the names and IDs of the applicants that you selected to forward.

Recipient Information

Use this group box to enter email addresses of the people to whom you want to forward these applicants.

Find	Click to access the Find Email Address page, where you can search for and select employees to whom you want to forward these applicants.
	See <u>Chapter 22, "Managing Applicants," Finding Email Addresses, page 646.</u>

Message

Use this group box to enter a subject for the message that you are sending and the actual message.

AccessSelect *Public* to allow any user to view the contact note for this
correspondence.Select *Private* to allow only the sender access to the contact note.

Previewing the Email

Access the Forward Applicant Preview page (click the Preview button on the Forward Applicant page).

Forwar	d Applicant Preview
*To:	HCMGENUser1@ap6023fems.us.oracle.com
Cc:	
Bcc:	
From:	Betty Locherty
Subject:	What do you think
Messag	e
	ook at this applicant and let me know if you're interested.
Applican Applid :	it Name : Bob Montana 1027
http://ada	view Bob Montana's profile from as0185.peoplesoft.com/psp/hc910tm1nt/EMPLOYEE/HRMS/c/HRS_HRAT.HRS_MANAGE_APP.GBL? RS_MANAGE_APP&Action=U&HRS_PERSON_ID=1027 page.
Thank Y Betty Loc	
Ret	turn

Forward Applicant Preview page

This page displays the message as it appears after the message that you enter is merged into the message template for forwarded email.

Rejecting Applicants

This section discusses how to reject applicants.

Pages Used to Reject Applicants

Page Name	Definition Name	Navigation	Usage
Reject Applicant	HRS_GACT_APP_REJ	Recruiting, Find Applicants, Find Applicants Search for applicants, then in the Search Results grid, select <i>Reject Applicant</i> in the Take Action field or the Group Action field. (This action is also available on other pages.)	Update an applicant's disposition to show that the applicant has been rejected.

Rejecting Applicants

Access the Reject Applicant page (on the Find Applicants page, select *Reject Applicant* in the Take Action field for an applicant)

Manage Applicant:			
Reject Applicant			
Applicants Being Reject	ed		
Applicant	Name		
100202	Rodney Clarke		
Select Status			
Status Code: 110 Reject			
Status Reason: Offer Rejected			
Submit Submit & Send Correspondence Cancel			

Reject Applicant page

Applicants Being Rejected

This grid lists the applicants who were selected when you performed the Reject action.

Select Status

Status Code	If you use the delivered status definitions, the field displays <i>110 Reject</i> , which is the disposition that will be applied after you submit the status change.
Status Reason	Select a reason for applying the <i>Reject</i> disposition.
Submit and Cancel	Click the Submit button to complete the disposition update, or click the Cancel button to return to the Job Opening page without updating the applicant's disposition.
Submit & Send Correspondence	Click to complete the disposition update and send correspondence to the rejected applicant.

Changing Applicant Statuses

This section discusses how to change applicant statuses.

Note. Applicant statuses are the statuses that you define for the Applicant recruitment area, which deals with the overall availability of the applicant. This differs from the applicant's disposition, which is the applicant's status relative to a particular job opening.

See Also

Chapter 4, "Setting Up Recruiting Statuses," page 35

Pages Used to Change Applicant Statuses

Page Name	Definition Name	Navigation	Usage
Select New Applicant Status	HRS_GACT_RCM_STS	Recruiting, Find Applicants, Find Applicants Search for applicants, then in the Search Results grid, select <i>Change Applicant</i> <i>Status</i> in the Take Action field or the Group Action field. (This action is also available on other pages.)	Change an applicant's status.

Changing Applicant Statuses

Access the Select New Applicant Status page (on the Find Applicants page, select *Change Applicant Status* in the Take Action field for an applicant).

Change Ap	oplicant Status	
Select New Applicant Status		
Select Statu	IS	
*Status:	030 Inactive	
Reason:		
Submit	Cancel	

Select New Applicant Status page

Status Code

Select a status code. The delivered statuses are 010 Active,020 Hired,030 Inactive, and 040 Queued. These are the status codes that are defined for the Applicant recruitment area on the Statuses and Reasons page.

Managing Applicant Lists

This section provides an overview of applicant lists and discusses how to:

- View existing applicant lists.
- Create applicant lists.

- Manage applicant lists.
- Edit primary applicant list data.
- Add applicants to an existing list.

Understanding Applicant Lists

Applicant lists are manually-constructed groups of applicants that recruiters can use to facilitate the recruiting process. Recruiters can add applicants to a list and then perform tasks for one, several, or all applicants on the list at the same time. For example, a recruiter can create a list of applicants to contact, a list of applicants that are hot prospects but for whom there is no current job opening, or a list of college students who expressed interest in employment during an on-campus recruiting event.

Lists can be public or private. The creator of an applicant list is the owner of the list. All recruiters and hiring managers have access to public lists. They can view public lists, take actions on the applicants in the lists, add applicants to the lists, and view primary list information, but they cannot make changes to the primary list information. Only the list owner can edit primary list information for public lists. For private lists, only the list owner can view and make changes to the lists.

Page Name	Definition Name	Navigation	Usage
Applicant Lists	HRS_APPL_LIST	HRS_APPL_LIST Recruiting, Applicant Lists, Applicant Lists	
Create New List	HRS_CREATE_LIST	 Click the Create New List button on the Applicant Lists page. Select <i>Create New List</i> in the Group Action field on the Applicant List page. Recruiting, Find Applicants, Find Applicants Search for applicants, then in the Search Results grid, select Add Applicant to New List in the Take Action field or the Group Action field. (This action is also available on other pages.) 	Create an applicant list.
Applicant List	HRS_LIST_MEMBER	Click a list name on the Applicant Lists page.	Manage an applicant list and its membership.

Pages Used to Manage Applicant Lists

Page Name	Definition Name	Navigation	Usage
Edit Primary List Information	HRS_CREATE_LIST	Click the Edit Primary List Data link on the Applicant List page.	Edit information about the list such as its name and whether it is private or public.
Select Applicant List	HRS_SELECT_LIST	 Recruiting, Find Applicants, Find Applicants Search for applicants, then in the Search Results grid, select <i>Add</i> <i>Applicant to Saved List</i> in the Take Action field or the Group Action field. (This action is also available on other pages.) On the Applicant List page, select <i>Add to</i> <i>Another List</i> in the Group Action field. 	Select the applicant list to which you want to add an applicant.

Viewing Existing Applicant Lists

Access the Applicant Lists page (Recruiting, Applicant Lists, Applicant Lists).

Applicant Lists				
			Display: Only My Lists	• \$
Applicant Lists				
Find List:	Go		First Previous Ne	xt 🕨 Last 🕪
List Details				
List	Access	Date Created	Owner	Delete
Excellent Applicants	Public	2004-09-12	Betty Locherty	â
Good Prospects	Public	2004-07-26	Betty Locherty	1
Inactive Applicants	Public	2005-11-28	Betty Locherty	Î
To Call List	Private	2004-07-26	Betty Locherty	1
Create New List Find Applicants			·	·

Applicant Lists page

Display	Select which applicant lists you want to view and click the Refresh icon to view those lists. Values are:
	Only My Lists: Select to view only lists that you own.
	All Lists: Select to view all public lists along with any private lists that you own.
Find List and Go	Enter a partial or full list name to search for that list and click Go to display the search results.
List Details	
List	Click a link to access the Applicant List page, where you can view details for all applicants on the list.
Access	Displays whether the list is public or private.
Date Created and Owner	Displays the name of the user that created the list and the date that the list was created.
Page-Level Actions	
Create New List	Click this button to access the Create New List page so that you can create a new applicant list.

Find Applicants

Click this link to navigate to the Find Applicants page, where you can search for applicants and use the *Add Applicant to New List* or *Add Applicant to Saved List* action to add the applicants to lists.

Creating Applicant Lists

Access the Create New List page (on the Applicant Lists page, click the Create New List button).

Create N	ew List
Name Your N	ew List
*List Name:	
Description:	
*Status:	Active 🔽
Continue	Cancel

Create New List page

Name Your New List

List Name and Description	Enter identifying information about the new list. The name appears on the Applicant Lists and Applicant List pages; the description appears on the Edit Primary Applicant List Data page.
Status	Select <i>Active</i> or <i>Inactive</i> . When a list is inactive, only the list owner can view the list, even if it is a public list. You cannot add applicants to inactive lists.
Public	Select to make the list a public list. Deselect this check box if you want this list to be private.

Managing Applicant Lists

Access the Applicant List page (on the Applicant Lists page, click the Add Applicants button).

Applicant List: To C	Call List				
ist Name: To Call List Owner: Betty Locher		Access: Created On:	Private 2004-07-2	6	
Add Applicants De	lete List	t Primary List Data	Previous	Next <u>Back t</u>	to List
Applicant List: To Call List Find Applicant: Applicants		Go efficiency First	Previous	Next ▶ Las	t 🕨
Name	Applicant ID	Preferred Contact	Last Contacted	Contacted By	Delete
Diane Ironside	280	HCMGENUser1@ap6023fems.us.oracle.co m	07/25/2004	Betty Locherty	Î
Cassandra Jacobson	1021	HCMGENUser1@ap6023fems.us.oracle.co m			Î
Select All Deselect All	Select Action	Go			
Add Applicants De	lete List		Previous	Next <u>Back t</u>	to List

Applicant List page

Add Applicants	Click to access the Find Applicants page, where you can search for and select applicants to add to the list.
Delete List	Click to delete the list. Only the list owner can delete the list.
Edit Primary List Data	Click to access the Edit Primary List Information page, where you can change the list name, description, status, and availability (public or private).
Find Applicant and Go	Enter the partial or full name of the applicant that you are searching for and click Go to display the search results.
Applicants	
Name	Click an applicant's name to access the Manage Applicant page for that applicant.
Preferred Contact	Displays the email address, phone number, or mailing address of the applicant, depending on the applicant's preferred contact method. You can update an applicant's preferred contact method on the Manage Applicant page: Applicant Data tab: Contact section.

<select action=""> and Go</select>	Use the unlabeled group Action field at the bottom of the page to perform actions that relate to the overall applicant record (without regard to any particular job opening). Select an action to perform, then click the Go button to initiate the action.
	In this context, the following actions are available: Add Note, Add to Another List, Create New List, Forward Applicant, Link Applicant to Job, Route Applicant, and Send Correspondence.
	See <u>Chapter 22, "Managing Applicants," Summary of Action Availability, page 604.</u>

Editing Primary Applicant List Data

Access the Edit Primary List Information page (on the Applicant List page, click the Edit Primary List Data link).

Edit Prim	nary List Information
Primary List	Information
*List Name:	To Call List
Description:	To Call List
*Active:	Active
Owner:	Betty Locherty
Access:	Private
	Public
Continue	Cancel

Edit Primary List Information page

List Name and Description	Enter identifying information about the new list. The name appears on the Applicant Lists and Applicant List pages; the description appears only on this page.
Active	Select <i>Active</i> or <i>Inactive</i> . When a list is inactive, only the list owner can view the list. You cannot add applicants to inactive lists.
Public	Select to make the list a public list. deselect this check box if you want this list to be private.

Adding Applicants to an Existing List

Access the Select Applicant List page (on the Find Applicants page, select Add Applicant to Saved List in the Take Action or Group Action field).

Select Applicant List		
Select Applic	ant List	
Select List:	Good Prospects	
Add to List	Cancel Return to Previous Page	

Select Applicant List page

Select List

Select the applicant list to which you want to add the applicant. All public lists are available, as are private lists that the user owns.

Creating Applicant Checklists

This section provides an overview of checklists and discusses how to create applicant checklists.

Understanding Checklists

A checklist helps you remember all the details that you need to get applicants through recruiting and hire processes. You can use standard checklists that you create in the Checklist component, or you can create an individualized checklist for a particular applicant. When you hire an applicant, the checklists for that applicant are passed to PeopleSoft Human Resources.

See Also

PeopleSoft HR 9.1 PeopleBook: Administer Workforce, "Setting Up the Administer Workforce Business Process," Creating Checklists

Page Name	Definition Name	Navigation	Usage
Applicant Checklist	HRS_APP_CHKLST	Recruiting, Find Applicants, Find Applicants Search for applicants, then in the Search Results grid, select <i>Manage Applicant</i> <i>Checklist</i> in the Take Action field. (This action is also available on other pages.)	Create a checklist for an applicant.

Pages Used to Create Applicant Checklists

Creating Applicant Checklists

Access the Applicant Checklist page (on the Find Applicants page, select *Manage Applicant Checklist* in the Take Action field).

Find Applicants	Find Applicants				
Applicant Checkl	ist				
Applicant Name: Jan Miller	r.		Applicant ID:	1	
Applicant Type: External A	Applicant		EmpliD:		
Applicant Information			Find View All Fi	rst 🚺 1 of 1	Last
*Checklist Date: 06/0 Checklist: KU0	9/2009 🛐 001 🔍 🗛	pplicant Checklis	at		+ -
Responsible ID:		ppricant oncount			
Comment:				<u>[</u>]	
Checklist Item	Customize	Find View All	🏾 🛗 🛛 First 🗖 1-5 of 10	Last	
*Sequence *Item Code	Description	*Briefing Status	*Status Date		
1 L00001 Q	Application Form Filled Out	Initiated 💌	06/09/2009	+ -	
2 L00002 🔍	Resume on Hand	Initiated 💌	06/09/2009	+ -	
3 L00003 🔍	Interview and Testing Set up	Initiated 💌	06/09/2009	+ -	
4 L00004 🤍	References Contacted	Initiated 💌	06/09/2009	+ -	
5 L00005 🔍	Verify Employment History	Initiated 💌	06/09/2009	+ -	
Save Cancel Return to Previous Page					

Applicant Checklist page

The fields on this page are a subset of those on the Employee Checklist page in PeopleSoft HR: Administer Workforce.

See *PeopleSoft HR 9.1 PeopleBook: Administer Workforce*, "Increasing the Workforce," Creating a Person Checklist.

Adding Persons of Interest

This section provides an overview of persons of interest and discusses how to:

- Select person of interest types and add persons of interest.
- View Search/Match results.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Search/Match"

Understanding Persons of Interest

Many organizations must add applicants to the human resources system as persons of interest before the applicants are actually hired. For example, you might want to add an applicant to the system as an external trainee so that you can enroll the applicant in training prior to being hired. When you add an external applicant as a person of interest, the system adds the applicant to the human resources system and assigns human resources ID to the applicant.

To add an applicant as a person of interest, use the *Add Person of Interest* action. This action is available only for external applicants. You cannot add internal applicants (employees or non-employees) as persons of interest because they already exist in the HR system.

Depending on whether the Person of Interest field on the Recruiting Installation - Applicants page is set to *Yes* or *No*, you may be required to check whether the applicant is already in the human resources database. When checking is required, submitting an applicant as a person of interest causes the system to search the HR system and display a list of potential matches. You review this list and, if you find a true match, you identify the record so that the system can associate the applicant with the existing record rather than creating a new record.

See Chapter 2, "Defining Installation Options for Recruiting," Defining Applicant-Related Settings, page 18.

After you add an applicant as a person of interest, you can confirm the transaction by verifying that the system has added an EmplID field to the Manage Applicant page: Applicant Data tab: Contact section.

Page Name	Definition Name	Navigation	Usage
Add Person of Interest	HRS_ADD_EXT_TRN	Recruiting, Find Applicants, Find Applicants Search for applicants and click an applicant name to access the Manage Applicant page. On the Manage Applicant page, select <i>Add Person of</i> <i>Interest</i> in the Take Action field at the top of the page, then click the Go button.	Select the person of interest type for the applicant and submit the applicant to the human resources system.

Pages Used to Add Persons of Interest

Page Name	Definition Name	Navigation	Usage
Search Results	HCR_SM_RESULTS	Click the Submit button on the Add Person of Interest page. The Search Results page appears if the system is	View Search/Match results and investigate potential matches.
		configured to search the system to see if the person you are adding already exists in the system.	

Selecting Person of Interest Types and Adding Persons of Interest

Access the Add Person of Interest page (on the Manage Applicant page, select *Add Person of Interest* in the Take Action field at the top of the page, then click the Go button).

Manage Applicant - Jan Miller					
Add Person of Interest					
Person of Interest Type					
Select Type:	External Trainee				
Submit					

Add Person of Interest page

Select Type

Select the person of interest type that you want to assign to the applicant. Define person of interest types on the Person of Interest Type Tbl (person of interest type table) page.

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Setting Up Organization Foundation Tables," Setting Up Person of Interest Types.

Viewing Search/Match Results

Access the Search Results page (click the Submit button on the Add Person of Interest page).

See Chapter 20, "Hiring Applicants," Reviewing Search/Match Results, page 573.

Processing Duplicate Applicants

This section provides an overview of duplicate applicant processing and discusses how to:

- Initiate duplicate applicant processing.
- Define search criteria and running the Find Applicant Duplicates process.
- Identify and merge duplicate applicant records.
- Manually merge applicants from the target record.
- Manually merge applicants from the source record.

Understanding Duplicate Applicant Processing

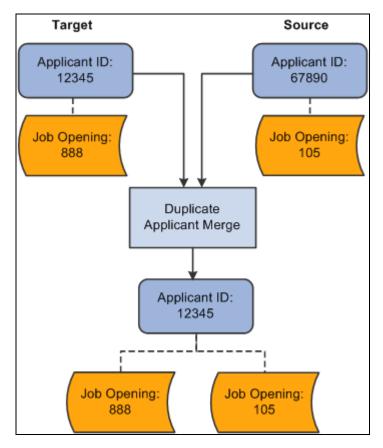
Sometimes an applicant has more than one record, each with its own applicant ID. Duplicate applicant records can occur when applicants register in Candidate Gateway more than once or when they submit their applications using different methods. For example, an applicant who was hired for short-term seasonal work might create a new Candidate Gateway account when applying to return to your organization the following year, resulting in both an active applicant record and a hired applicant record.

Talent Acquisition Manager provides two mechanisms for merging duplicate records:

- Automated processes that help recruiters identify potential duplicates and merge selected records.
- A manual merge process that recruiters can initiate from within an applicant record.

Target and Source Records

The following diagram illustrates the process of merging duplicate records. In the diagram, there are initially two different applicant IDs representing the same applicant. One record is marked as the *Target* record; this record will be updated with data from the other records and will remain active after the merge process. The other record is marked as the *Source* record; its data will be copied over to the target record and it will become inactive after the merge process. Each record is associated with a different job opening. When the records are merged, the surviving applicant record is automatically associated with both job openings.



The Applicant Merge process joins multiple applicant and relates all associated job openings to the surviving applicant.

Source records still exist after being merged, but they are assigned an inactive status. Use the Recruiting Installation component to configure the inactive status to assign to the duplicate records.

See Chapter 2, "Defining Installation Options for Recruiting," Defining Applicant-Related Settings, page 18.

Automated Processes for Managing Duplicate Records

The system provides two Application Engine processes that work together to help you manage duplicate records:

• The Find Applicant Duplicates (HRS_DUP_PRC) process uses search criteria that you specify to find potential duplicates.

For example, if you search on first and last name, the process results will include groups of potential duplicates whenever there are multiple applicants with the same first and last name. The process does *not* automatically merge these potential duplicates; you must review the results and identify targets and sources when you determine that there is, in fact, duplication.

• The Duplicate Applicant Merge process (HRS_DUPE_MRG) completes the data merge for the records that you have marked.

To use these processes for duplicate applicant processing:

1. Access the Process Duplicate Applicants page (Recruiting, Administration, Process Duplicate Applicants, Process Duplicate Applicants).

This page lists previous instances of the Find Applicant Duplicates process. All instances except the most recent have a *Closed* status, and the most recent instance will automatically be closed when you create a new instance.

- 2. Click the Create New Search button to access the Find Duplicate Applicants page, where you specify criteria to be used in identifying potential duplicates.
- 3. Select your search criteria and click the Run button to initiate the Find Applicant Duplicates process.

This process finds potential duplicate applicant records that match the search criteria that you define. Email, address, and middle name searches are case-sensitive.

For the system to consider two applicants a match, all search criteria that you define on the Find Duplicate Applicants page must match exactly. Records with duplicate email addresses, phone, and national ID numbers, regardless of type, are identified as potential duplicate records. For example, if one applicant record has a home email address that matches the business email address from another applicant record, the system counts this as a potential match regardless of the fact that the address types are different.

The process runs against active applicant records only: it does *not* include applicant records in the status that the Recruiting Installation - Applications page identifies as the inactive status for duplicates. This restriction prevents records that were inactivated during previous merges from reappearing in your search results.

See <u>Chapter 2</u>, "Defining Installation Options for Recruiting," Defining Applicant-Related Settings, page 18.

Note. If you need to merge an inactive applicant record, use the manual merge process.

4. Return to the Process Duplicate Applicants page and click the View Duplicates link to access the Review Duplicate Applicants page, then review the process results and identify records to merge.

The system groups each set of potential duplicate applicants into duplicate sets. If you determine that the applicants in a duplicate set are in fact duplicates, identify which applicant records will survive the merge and mark them as target records. Mark records that are to be merged into the target as source records, and explicitly identify the matching target record. For each duplicate set, there can be multiple source and target records.

To determine which records should be merged, you might need to review detailed information about a record. To do this, click the applicant record ID to access the Manage Applicant page.

5. Click the Run button on the Review Duplicate Applicants page to run the Duplicate Applicant Merge process and complete the merge for any records that you have marked for merging.

If you return to the Review Duplicate Applicants page after the process is complete, the merged applicant records are read-only. Unmerged applicant records, however, are still editable. You can continue to identify target and source records and run the Duplicate Applicant Merge process as long as there are still unmerged applicants on the page.

Manual Merges

If you have already identified duplicate records, you can manually merge them without running the search process that finds potential duplicates for you. To do this, access the Manage Applicant page for one of the duplicate records, then use the Take Action field to initiate the merge. There are two merge actions available:

- *Merge as Target* uses the current applicant record as the target and opens the Merge as Target page where you identify one or more sources records before completing the merge.
- *Merge as Source*uses the current applicant record as the source and opens the Merge as Source page where you identify the target record before completing the merge.

Note. Manual merges also use the Duplicate Applicant Merge Application Engine process (HRS_DUPE_MRG), however, you do not use the Process Scheduler Request page to initiate the process. Rather, the system automatically initiates the process when you click the Merge button.

Data Merging

When you merge applicant records, the following data changes occur:

• The status for the non-surviving applicant records is set to the status entered in the Inactive State for Duplicates field on the Recruiting Installation - Applicants page.

See <u>Chapter 2</u>, "Defining Installation Options for Recruiting," Defining Applicant-Related Settings, page 18.

• The system updates the target record with the most current contact information (first name, middle name, last name, address, phone numbers, email addresses) and identity and eligibility data.

If there is no data on the target record, but there is data on the source record, the system uses the data on the source record to update the target record. If data on the source and target records has the same effective date, the system does not change the data on the target record.

• All unique recruitment rows from the source records are added to the target record so that there is no loss of data.

This includes interview schedules, interview evaluations, contact notes, expenses, interested parties, references, and referral sources.

Note. If you merge records for internal applicants (employees and non-employees), the system deletes or modifies the applicant record only. Information held in Personal Data tables is never modified or deleted.

Pages Used to Process Duplicate Applicants

Page Name	Definition Name	Navigation	Usage
Process Duplicate Applicants	HRS_DUPE_PRCS	Recruiting, Administration, Process Duplicate Applicants, Process Duplicate Applicants	Create new instances of the duplicate applicant search process and access the results of those searches.

Page Name	Definition Name	Navigation	Usage
Find Duplicate Applicants	HRS_DUPE_FIND	 Click the Create New Search button on the Process Duplicate Applicants page. Click a link in the Status column on the Process Duplicate Applicants page. 	Select fields for duplicate matching and initiate the process of searching for duplicates.
Review Duplicate Applicants	HRS_DUPE_REVIEW	 Click the View Duplicates link on the Process Duplicate Applicants page. Click the Merge Applicants link on the Screen Applicants page or on the Screening Results page 	Review the results of the process that searches for duplicate applicants, identify records to merge, and initiate the merge process.
Merge As Target	HRS_APP_MERGE	Recruiting, Find Applicants, Find Applicants Click an applicant name to access the Manage Applicant page. On the Manage Applicant page, select <i>Merge As</i> <i>Target</i> in the Take Action field at the top of the page, then click the Go button.	Merge the applicant record with one or more other applicants that you identify. The applicant whose record you use to initiate the action will be the surviving applicant.
Merge As Source	HRS_APP_MERGE	Recruiting, Find Applicants, Find Applicants Search for applicants and click an applicant name to access the Manage Applicant page. On the Manage Applicant page, select <i>Merge As</i> <i>Source</i> in the Take Action field at the top of the page, then click the Go button.	Merge the applicant record with a target applicant that you identify. The target applicant will be the surviving applicant.

Initiating Duplicate Applicant Processing

Access the Process Duplicate Applicants page (Recruiting, Administration, Process Duplicate Applicants, Process Duplicate Applicants).

Process Duplicate Applicants					
 Select to View Instruction 					
To process duplicate applicants, select or create a search and select the fields you would like to use for comparison of applicant records. If the data in the selected fields matches for two or more records, the records will be flagged as possible duplicates and the results returned to you for determination and further action. Create New Search Refresh					
Review Duplicate Processes	Customize	Find View All Mar 1	First 🚺 1-2 of 2 🖸 Last		
Run Control ID	Last Updated	Status	View Duplicates		
HRS_DUPE_FIND_2	08/19/2009 11:03PM	Search Requested	View Duplicates		
HRS_DUPE_FIND_1	05/01/2006 3:41PM	Review in Progress	View Duplicates		

Process Duplicate Applicants page

Page-Level Actions

Create New Search	Click this button to access the Find Duplicate Applicants page, where you can select new duplicate applicant search criteria and run the Find Applicant Duplicates process.
Refresh	Click to refresh the status links with the current status of the process.

Review Duplicate Processes

Status	Displays the status of the process instance. Click a status link to access the Find Duplicate Applicants page, where you can review the duplicate applicant search criteria used for the process. Values are:
	• <i>Search Requested:</i> Indicates that the Find Applicant Duplicates process has been initiated.
	• <i>Search In Progress:</i> Indicates that the Find Applicant Duplicates process is running.
	• <i>Search Completed:</i> Indicates that the Find Applicant Duplicates process is complete but that the results have not been reviewed.
	• <i>Review In Progress:</i> Indicates that the results of the Find Applicant Duplicates process are being reviewed. The system assigns this status when you click the View Duplicates link for the process.
	• <i>Merge Completed:</i> Indicates that the Duplicate Applicant Merge process has finished running.
	You can continue run the merge process on additional sets of duplicate records.
	• <i>Closed:</i> Indicates that the search is closed. The system assigns this status to queued or pending processes when you run the Find Applicant Duplicates process for a new process. Only one process can be active at a time. This ensures data integrity and avoids process conflicts among target and source applicants during the merge.
View Duplicates	Click to access the Review Duplicate Applicants page, where you can identify duplicate sets and merge duplicate applicant records. This link appears after the Find Applicant Duplicates process is complete.

Defining Search Criteria and Running the Find Applicant Duplicates Process

Access the Find Duplicate Applicants page (on the Process Duplicate Applicants page, click the Create New Search button or click a link in the Status column).

Note. Once you initiate the Find Applicant Duplicates process, this page becomes read-only. You must then create a new search to establish new search criteria.

Process Duplicate Applicants		
Find Duplicate Applicants	;	
Run Control ID: HRS_DUPE_FIND_2	Report Manager	Process Monitor Run
 First Name Middle Name Last Name Second Last Name Alternate Character Name 		
Phone Email		
Date of Birth		
Gender		
National ID		

Find Duplicate Applicants page (1 of 2)

Address Line 1
Address Line 2
Address Line 3
Address Line 4
City
County
Postal Code
State
Country
Address Field 1
Address Field 2
Address Field 3
🗖 Number 1
Number 2
🗖 House Type
🗖 In City Limit
Tax Vendor Geographic
Alternate Character Address 1
Alternate Character Address 2
Alternate Character Address 3
City Alternate Character

Find Duplicate Applicants (2 of 2)

Select the data that must be identical for applicants to be considered as duplicates.

Note. Email, address, and middle name searches are case-sensitive. Records with duplicate email addresses, phone, and national ID numbers, regardless of type, are identified as potential duplicate records. For example, if one applicant record has a home email address that matches the business email address from another applicant record, the system counts this as a potential match regardless of the fact that the address types are different.

When you first access this page for new duplicate processing, the search settings are copied from the settings for the previous search.

Click the Run button to access the Process Scheduler Request page, where you initiate the duplicate search process.

Identifying and Merging Duplicate Applicant Records

Access the Review Duplicate Applicants page (on the Process Duplicate Applicants page, click the View Duplicates link).

Process Du	Process Duplicate Applicants								
Review Duplicate Applicants									
Run Control ID: HRS_DUPE_RVW_2_1 Report Manager Process Monitor									
Duplicate Re	eview							Fi	nd View All First 🗹 1 of 50 🕨 Las
Duplicate Se	et ID: licate Applicants	1	Duplicate Set	Status: I	No Merges				
Applicants	Relationship	Target	First Name	Last Name	Address Line 1	City	State	Country	Postal Code
2	Target 💌		Jan	Bradley	1923 Roble Road	Berkeley	CA	USA	94706
<u>72</u>	Source 💌	2 💌	Jan	Bradley	382 Hayes Street	New York	NY	USA	10023
									<u>Return to Main Pa</u>

Review Duplicate Applicants page

Run

After you have reviewed potential duplicates and identified records that you want to merge, click the Run button to initiate the Duplicate Applicant Merge process and complete the merge for the indicated records.

You can process subsets of the potential duplicates. For example, you can run the process for the first 10 duplicate sets and then the rest at a later time.

Note. After you start the Duplicate Applicant Merge process, you cannot cancel it. You must be certain that you want to merge the applicant records before you schedule the process.

Duplicate Review

Use this group box to specify how the system merges duplicate applicant records. Applicants with matching data are grouped into duplicate sets. Review each set and decide if the applicant records are duplicates.

Duplicate Set ID	Displays the ID number for the duplicate set. Refer to the group box header to see how many total duplicate sets exist.		
Duplicate Set Status	Displays the status of the merge process. Values are:		
	<i>No Merges:</i> Indicates that the system has not merged duplicate applicant records for the duplicate set.		
	<i>Merged:</i> Indicates that the system has merged duplicate applicant records in the duplicate set.		

Review Duplicate Applica	Review Duplicate Applicants			
Applicants	Click the applicant ID link to access the Manage Applicant page, where you can view additional details for the applicant. (On the Manage Applicant page, clicking the Applicant List link returns you to the Review Duplicate Applicants page.)			
Relationship	Specify how the applicant records are merged. Values are <i>Source</i> and <i>Target</i> . For each duplicate set, there can be multiple source and target records. You cannot edit these fields after you run the Duplicate Applicant Merge process and merge the applicants.			
	Leave these fields blank if you determine that the applicants in a duplicate set are not duplicates or if you have not yet made a determination.			
Target	Select the target for each source record. The drop-down list box lists the applicant IDs for applicants in the same duplicate set who have been identified as targets.			
	This column appears on the page only after you select <i>Source</i> in the Relationship column for an applicant.			

Manually Merging Applicants from the Target Record

Access the Merge As Target page (on the Manage Applicant page, select *Merge As Target* in the Take Action field at the top of the page, then click the Go button.)

Manage Applicant: Jan Bradley						
Merge As Target						
Name: Applicant ID:	Jai 2	n Bradley		Applicant Type:	External Applicant	
Contact: Phone: Email:	51	one 0/562-2333 MGENUser1@)an603	Status: Address: 23fems.us.oracle.com	010 Active 1923 Roble Road Berkeley, CA 94706	
Target Person: Sources to Mer		-	2	Jan Bradley		
Person ID	90	Display Name				
7:	2 🔍	Jan Bradley				+ -
Merge					Return to Previous Page	

Merge As Target page

Person ID	Identify one or more applicant records that will be merged into the current record.
Merge	Click to run the Duplicate Applicant Merge process and complete the merge.

Manually Merging Applicants from the Source Record

Access the Merge as Source page (on the Manage Applicant page, select *Merge As Target* in the Take Action field at the top of the page, then click the Go button.)

Manage Applicant: Jan Bradley						
Merge as Source						
Name:	Jan Bradley	Applicant Type:	External Applicant			
Applicant ID: Contact: Phone: Email:	2 Phone 510/562-2333 <u>HCMGENUser1@ap6023fer</u>	Status: Address: ms.us.oracle.com	010 Active 1923 Roble Road Berkeley, CA 94706			
Target Person:	72 🔍 Jan	Bradley				
Sources to Mer	ge					
Person ID	Display Name					
	2 Jan Bradley					
Merge			Return to Previous Page			
lerge as Source page						
Farget Person	Identify	the applicant record i	into which the current record will be merged.			

Merge

Click to run the Duplicate Applicant Merge process and complete the merge.

Using the Job Search Agent

This section provides an overview of the Job Agent (HRS_JOB_AGNT) Application Engine process and discusses how to run the Job Agent process.

See Also

PeopleSoft Candidate Gateway 9.1 PeopleBook, "Using Candidate Gateway," Reviewing and Searching for Job Postings

Understanding the Job Agent Process

Job Agent functionality enables the system to notify applicants of job postings that meet the applicants' saved criteria.

Applicants establish their criteria in Candidate Gateway by saving searches with the criteria for the types of jobs in which they are interested in applying. These saved searches are processed whenever an administrators runs the Job Agent (HRS_JOB_AGNT) process.

During the Job Agent process, the system:

1. Deleted expired job search agents in HRS_AGNT_PROF.

The system determines whether the job search agent has expired by taking the date that the job agent was created and adding the number of days that you enter in the Days Job Search Agent Active field on the Recruiting Installation - Applicants page. The process compares the resulting date to the system date. If the resulting date is less than the system date, the system deletes the job search agent.

See <u>Chapter 2</u>, "Defining Installation Options for Recruiting," Defining General Settings for Templates, <u>Approvals</u>, and Integrations, page 11.

2. Searches for job postings that match the job agent search criteria, and writes the results to a file called HRS_AGNT_RSLT.

In addition to meeting the applicant's search criteria, job postings must meet certain general requirements:

- The job opening status is Open.
- The posting destination is a *Company* type recruitment source.
- The posting type, *External* or *Internal*, is correct for the applicant who created the job agent.
- There is at least one section of the posting that is visible to the applicant who created the job agent.

Each section of a job posting has a visibility of *Internal Only, External Only, or Internal and External.*

3. Posts a notification in the Notifications grid on the Careers Home page in Candidate Gateway.

Applicants can click on the subject link for the notification to view the message, which contains links to the job postings that meet the applicant's criteria.

If the applicant has multiple job search agents, the system posts a separate notification for one.

4. Sends the applicant an email notification using the JobAgentNotification template.

This occurs only if the applicant's contact information includes an email address. The email includes links to the job openings that match the applicant's criteria, up to the maximum number of job openings specified in the Max Job Posts Per Notification field in the Recruiting Installation - Jobs page. If the number of matches exceeds the maximum, the notification email also directs the applicant to visit Candidate Gateway to access complete search results.

Prerequisites

Enter values for these fields in the Recruiting Installation component:

- Max Job Posts per Notification (Recruiting Installation Jobs page).
- Days Job Search Agent Active (Recruiting Installation Applicants page).
- Maximum Job Agents (Recruiting Installation Applicants page).

See Chapter 2, "Defining Installation Options for Recruiting," Apply Online, page 19.

Page Used to Run the Job Agent Process

Page Name	Definition Name	Navigation	Usage
Job Search Agent	HRS_RUN_JOBAGNT	Recruiting, Administration, Run Job Search Agent, Job Search Agent	Run the Job Agent process.

Running the Job Agent Application Engine Process

Access the Job Search Agent page (Recruiting, Administration, Run Job Search Agent, Job Search Agent).

This run control page does not have any parameters.

Click Run to access the PeopleSoft Process Scheduler Request page, where you schedule the Job Agent process.

Note. Best practice is to set up the request so that the Job Agent process runs at regular intervals.

Generating Applicant Reports

This section lists the pages used to generate certain applicant-related reports.

See Also

Appendix C, "PeopleSoft Talent Acquisition Manager Reports," page 763

Pages Used to Generate Applicant Related Reports

Page Name	Definition Name	Navigation	Usage
Applicant Listing	PRCSRUNCNTL_LC_HR	Recruiting, Reports, Applicant Listing, Applicant Listing	Generate an Applicant Listing report, which you can use to view job opening information with a list of the candidates being interviewed for the positions. The report groups job openings by department ID.
Applicant Summary by Job	PRCSRUNCNTL_LC_HR	Recruiting, Reports, Applicant Summary by Job, Applicant Summary by Job	Generate the Applicant Summary by Job report, which you can use to view the number of applicants and percentage of total applicants that applied to a job opening, sorted by source type and specific source.
Applicant Summary by Source	PRCSRUNCNTL_LC_HR	Recruiting, Reports, Applicant Summary by Source, Applicant Summary by Source	Generate the Applicant Summary by Source report, which you can use to view the number of applicants and percentage of total applicants sorted by source type and specific source (regardless of job opening).
Job Group Movement Analysis	RUN_CNTL_REG_INTRO	Recruiting, Reports, Job Group Movement Analysis, Job Group Movement Analysis	Generate the Job Group Movement Analysis report, which you can use to generate racial and gender demographic data regarding the hiring process. This report provides an analysis of the number of males and females by ethnic group who were applicants, hires, promotions, or terminations during a specified time period. The report shows which sex and ethnic groups are moving in and out of the organization and which groups are offered opportunities for advancement.

Chapter 23

Managing Resumes

This chapter provides an overview of resume management and discusses how to:

- Load resumes.
- Manage resumes.

Understanding Resume Management

This section discusses:

- Channels.
- Resume extraction process.
- Resume statuses.

Channels

Applicant resumes can come into the Recruiting Solutions system from one of these channels:

- Email.
- Resume Load Process Application Engine process (HRS_RESLOAD).
- Job boards and service providers.
- Apply online.
- Add New Applicant (HRS_ADD_APPLICANT) component.

Resume Management supports all resume document formats and will accept HR-XML resumes from all channels. However, only OIF uses the data within the HR-XML document to directly write data to Recruiting Solutions tables. The other processes route the document to a resume extractor for processing. Not all resume extractors support all resume document formats. If the resume extractor doesn't support the resume document format, the resume extraction process fails.

Email

Applicants and staffing suppliers can email resumes to a designated email address that you set up.

See Chapter 10, "Setting Up Third Party Integrations," Setting Up Resume Email Accounts, page 199.

Resume Load Process Application Engine Process (HRS_RESLOAD)

The Resume Load Process enables organizations to load resumes that it receives.

See Chapter 23, "Managing Resumes," Loading Resumes, page 686.

Open Integration Framework

OIF is used to receive web services from staffing suppliers (job boards, recruitment agencies, and services procurement providers) which may contain either a candidate HR-XML or an unstructured resume as an attachment. For example, a recruitment agency that your organization integrates with can send XML resumes through the OIF. Because the agency sends an XML resume file, the system does not need to perform any extraction. Instead, the system uses the data directly from the XML resume file to process through Recruiting Solutions. Although no extraction is performed on the XML resumes, the resumes still go through data mapping and any other business process that you have set up for the staffing supplier.

When a staffing supplier submits a resume, it is common not to contact the applicant to whom the resume belongs. Instead, all communication with the applicant, up until the interview with the applicant, is done through the staffing supplier. The person at the staffing supplier organization who handles this duty is referred to as a proxy. The proxy takes on all responsibilities of the applicant and is both responsible and expected to act in the best interest of the applicant. On system pages that show applicant contact information, the contact information for the proxy is also included. When you send correspondence to an applicant that uses a proxy, the system sends the correspondence to the proxy, not the applicant.

To use OIF to receive resumes, the staffing supplier organization must set up web services and deliver the configuration file that you will use to set up the vendor.

To set up OIF to receive incoming candidates in Talent Acquisition Manager:

1. Set up the vendor.

See Chapter 10, "Setting Up Third Party Integrations," Setting Up Recruiting Vendors, page 180.

2. Set up a recruitment source and link the vendor to the source.

The system determines how to process the resumes based on the settings that you specify for the recruitment source on the Vendor page in the Source Setup (HRS_SOURCE_SETUP) component. For example, the system checks the Vendor page for the source from which it receives a resume to determine which status to assign to the resume.

When you set up contacts for the source, you can specify which contact to use as the proxy. If you do not specify a contact to use as a proxy, the contact setup is used only for informational purposes.

See Chapter 11, "Setting Up Recruitment Sources," Setting Up Recruitment Sources, page 212.

Apply Online

Internal and external applicants can use PeopleSoft Candidate Gateway to apply for job openings online.

See PeopleSoft Candidate Gateway 9.1 PeopleBook, "Using Candidate Gateway," Applying for Jobs.

Add New Applicant Component

Recruiters and hiring managers can enter applicant data manually by using the Add New Applicant component.

When recruiters and hiring managers manually enter data for an applicant, they have the option to attach a resume. The data in the resume is not extracted or used to automatically populate fields in the Add New Applicant component. However, the creation of these applicants is tracked in the Manage Resumes component.

See Chapter 15, "Entering Applicant Data," page 349.

Understanding the Resume Extraction Process

Resume extractors extract data from applicant resumes and move the data into Recruiting Solutions tables. Organizations can use multiple resume extractors. For example, you can use a different resume extractor for each country in the organization, or you can use different resume extractors for each recruitment source from which you receive resumes.

The resume extractor that the system selects to use depends on the resume extractor that you specify for a recruitment source, a site, or the extractor that you specify when you run the Resume Load Process or run an extraction from the Manage Resumes (HRS_AL_LOG) component. If an applicant attaches their resume to their online application in Candidate Gateway, the system uses the resume extractor that is specified on the Site - Setup Site page for that online application site. If the resume comes from a specific recruitment source; for example, a recruiting agency, the system uses the resume extractor that you specified in the Source Setup component when you set up the recruitment source. When you load resumes by using the Resume Load Process, you select which extractor to use when you run the process.

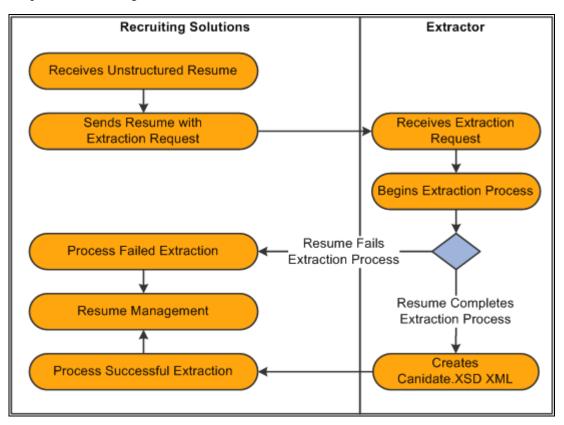
Resume extractors extract data from an applicant's resume. Not all extractors extract the same data. PeopleSoft software supports the following data from the extractors:

- Contact information: applicant name, home address, telephone numbers, and email address.
- Prior work experience.
- Secondary education.
- Qualifications including licenses and certificates, languages, memberships, honors and awards, and competencies.
- Referrals.
- Full resume text.

Upon successful extraction, the system creates a record for the applicant in the Manage Applicant component, and populates fields in the Manage Applicant component for the applicant. The system also assigns the applicant an applicant ID, a status, a resume name, adds the original resume as an attachment, and associates any job openings that might be applicable. If the applicant attaches a resume when they apply online through Candidate Gateway, the resume extractor populates fields in the applicant's online application and referrals. Of course, this presumes that the extractor actually extracted this data.

Note. The resume extraction process isn't required for applicants to apply for job openings online by using Candidate Gateway.

This process flow shows the resume extraction process starting with receipt of an unstructured resume and ending when the results of the successful or failed extraction are saved to the resume management tables in PeopleSoft Recruiting Solutions.



Resume extraction process showing tasks performed within PeopleSoft Recruiting Solutions and tasks performed by the extractor

Understanding Resume Statuses

The system assigns a status, or resolution state, to each resume that it receives. For resumes from recruitment sources that are a Vendor type, the system uses the settings that you define on the Vendor page in the Source Setup component to determine which status to assign to the resume. For the Resume Load Process, the system uses the run parameters that you set up to determine what statuses to assign.

The resume status of a resume is different than the extraction status of the resume. The extraction status of a resume can be either Success or Fail. In general, a resume that fails an extraction process is automatically set to either a Rejected or Unresolved resume status, and resumes that are successfully extracted are set to either a Success or Draft resume status, depending on the business rules that you set up for the recruitment source or the parameters that you select when you run the Resume Load Process.

When the system receives a resume through OIF, the resume extraction process might not be involved. However, the resume status is still applicable. For example, if the system receives a Candidate-XML message directly from a recruiting agency through OIF that is already parsed (extracted), the system does not send it to a resume extractor. However, the system does run the resume through the autoscreening rules that an organization sets up for the recruitment source.

This table describes resume statuses:

Resume Status	Description	Default Applicant Status
Awaiting Resolution	Indicates that the resume is in the database but has not yet been processed through a resume extractor.	Not applicable. Applicant data is not created until the resume is extracted.
Unresolved	Indicates that the resume requires an administrators attention to move the resume into a Rejected or a Success resume status. Resumes in the Unresolved state can be reprocessed through an extractor, the associated applicant data for these resumes can be manually modified, and then the administrator can set the resume to a Success or Reject status.	Queued
Rejected	Indicates that the system rejected the resume and has set the associated applicant's status to Inactive if the system created an applicant. A resume can be rejected for several reasons. PeopleSoft software supports two types of automatic rejection. First, resumes that are not successfully extracted can automatically be set to the Rejected status. Second, the autoscreening setup for the recruitment source can determine that a resume/applicant fails the Rejected status autoscreening definition and automatically set the resume status to Rejected. Finally, a user can manually set the resume status to Rejected from the Manage Resumes component.	Inactive

Resume Status	Description	Default Applicant Status
Draft	Indicates that the resume requires the associated applicant's attention to move the resume into a Success state. The associated applicant's status is set to Queued. Resumes in the Draft state can be reprocessed through an extractor, the associated applicant data for these resumes can be manually modified, and then the administrator can set the resume to a Success or Reject status. Assigning a Draft status typically requires that the applicant validate their extracted resume data via the online application pages in Candidate Gateway. When the applicant submits the corresponding resume online, the status is updated to Success. If applicants do not validate their resume data, the resume stays in Draft status unless an administrator intervenes.	Queued
Success	Indicates that the resume is successfully extracted and the resume's associated applicant has been set to Active and is ready to continue through the recruitment business processes. When an applicant uses the resume extraction process through Candidate Gateway when they apply for jobs online, the resume status for that resume defaults to Success.	Active

See <u>Chapter 11, "Setting Up Recruitment Sources," Defining Settings for Vendor Recruitment Sources, page 216.</u>

Loading Resumes

This section provides an overview of the Resume Load Process, lists prerequisites, and discusses how to load resumes.

Understanding the Resume Load Process (HRS_RESLOAD)

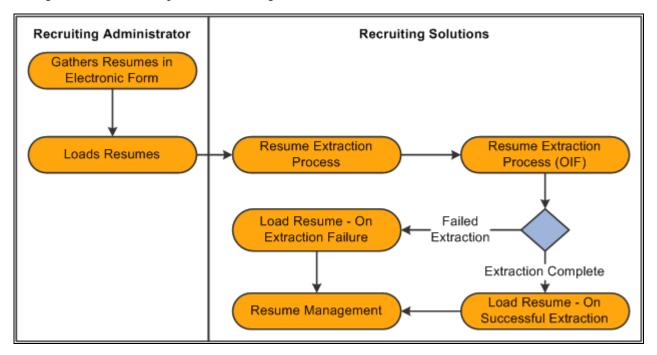
The Resume Load Process enables organizations to load resumes that it receives in electronic formats. The electronic formats that the system can accept are limited only by the resume extractor that you select to use for the process. You can also use the Resume Load Process to upload paper resumes that you receive, after you transform the paper resumes into an electronic format.

When you set up the process you can specify the resume extractor that you want the system to use, parameters for the resume extractor, the site ID to which you want to redirect applicants, the source to which you want to associate resumes, the statuses that you want to assign to the resumes upon a failed or successful extraction, and the job openings that you want to associate to the applicants. You must browse for and upload the resumes that you want to use in the process. You can upload individual resume documents, or you can upload a zip file that contains multiple resumes.

When you run the process, the system sends the resumes to the resume extractor to parse. After the Resume Load Process completes, you can use the Manage Resumes component to view the status of each of the resumes.

See Chapter 23, "Managing Resumes," Managing Resumes, page 692.

This diagram shows the Resume Load Process from the time a recruiting administrator gathers resumes in electronic form and ending when the results of the successful or failed extraction are saved to the resume management tables in PeopleSoft Recruiting Solutions.



Resume Load Process for loading electronic resumes into resume management tables

Prerequisites

Before you can load resumes using the Resume Load Process, you must:

• Set up resume extractor vendors.

See link to resume extractor vendor setup in TAM

• Set up site IDs.

See Chapter 6, "Setting Up Candidate Gateway Sites," Setting Up Sites, page 91.

• Set up sources and subsources if you want to associate the resumes with a source.

See Chapter 11, "Setting Up Recruitment Sources," Setting Up Recruitment Sources, page 212.

• Create job openings if you want to associate applicants with a job opening.

See Chapter 13, "Creating Job Openings," Entering Primary Job Opening Information, page 242.

Page Used to Load Resumes

Page Name	Definition Name	Navigation	Usage
Load Resume - Prepare Load Parameters	HRS_RESLOAD	Recruiting, Administration, Load Resume, Load Resume - Prepare Load Parameters	Load resumes.

Loading Resumes

Access the Load Resume - Prepare Load Parameters page (Recruiting, Administration, Load Resume, Load Resume - Prepare Load Parameters).

Load Resume Prepare Load Parameters		
Load Parameters		
Basic Information		
*Resume Load Description:	PS 2009-08-22 17:27	
Resume Load Status:	In Preparation	
Comments:		24
Extractor:		
Site ID:	Default Site	
Country:	United States	
Language:	English	
*On Successful Extraction:	Set to Draft	
*On Extraction Failure:	Set to Unresolved	
Run Control ID:		Process Monitor

Load Resume - Prepare Load Parameters page (1 of 2)

Resume Source				
Source	SubSource			
Magazines 💌	Other		•	+ -
Job Openings		Customize Find ^L	🗖 🛗 🛛 First 🗹 1 of	1 🗈 Last
Job Opening ID	Posting Title	е		
Q				+ -
Resumes				
Resumes		Status		
Attached File		Awaiting Load		
	-	Add Multiple Resumes	Add Resu	me
Load Resume)			

Load Resume - Prepare Load Parameters (2 of 2)

Basic Information

Use this group box to specify basic load parameters for the Resume Load Process. The system remembers the settings that you specify in this group and uses the settings for the next process, except for the value in the Resume Load Description field, which is dynamic, and the Comments field. You can change the defaulted load parameters each time that you run process.

Resume Load Description	The system populates this field with the user ID of the person logged in to the system along with the current date and time. You can edit the description if needed.
Resume Load Status	Displays the status of the Resume Load Process. Values are:
	<i>In Preparation:</i> Indicates that the process has not started. The system displays this status until you click the Load Resumes button.
	<i>Load in Progress:</i> Indicates that the process is in progress. The system displays this status after you click the Load Resumes button and before the process completes.
	<i>Loaded:</i> Indicates that the process is complete. The system displays this status after all resumes are processed.
Comments	Enter comments. These comments appear only on this page and are used only for informational purposes.
Extractor	Select the resume extractor that you want the system to use. Only active vendors from the ResumeExtractor transaction group appear in this prompt. Define vendors by using the Vendor Setup (HRS_VENDOR_SETUP) component.

Site ID	Select a site ID where you want to redirect applicants. Define sites on the Site - Site Setup page.
Country	Select a country. Some resume extractors require a country to begin the extraction process.
Language	Select the language in which the resumes are written. This is an optional field. Some resume extractors use this language for the extraction process, however, other extractors ignore this field.
On Successful Extraction	Select the status that you want the system to assign to the resume upon successful extraction. You can view the status of resumes by using the Manage Resumes (HRS_AL_LOG) component. Values are:
	<i>Set to Draft:</i> Select to set the status of successfully extracted resumes to Draft.
	<i>Set to Success:</i> Select to set the status of successfully extracted resumes to Success.
On Extraction Failure	Select the status that you want the system to assign to the resume upon a failed extraction. You can view the status of resumes by using the Manage Resumes component. Values are:
	<i>Reject Resume:</i> Select to set the status of resumes that failed to extract to Rejected.
	<i>Set to Unresolved:</i> Select to set the status of resumes that failed to extract to Unresolved.
Run Control ID	Displays the run control ID. The system generates the run control ID after you click the Load Resumes button.
Process Monitor	Click to access the Process List page, where you can monitor the process request.
Resume Source	
Source and SubSource	Select a source and subsource to assign to the resumes. The values that appear in the Source field are active recruitment sources with a source type of Marketing. After you select a source, the system populates the SubSource field with the subsources for that source. Define sources and subsources by using the Source Setup (HRS_SOURCE_SETUP) component.

Job Openings

Job Opening ID and Posting	Select a job opening ID to link the applicants to the job opening. When you
Title	select a job opening, the system populates the Posting Title field
	automatically. If you specify more than one job opening, the system creates
	one application, but links the applicants to all job openings. When you link
	a job opening to an applicant, the disposition is set to Applied.

Resumes

Use this group box to view the resumes that you have uploaded.

Resumes	Displays the file name for each resume that you have uploaded as a link. Click the file name link to open and view the resume in a separate browser window. To successfully open the file, you must have the application that the resume was created in installed on your computer.
Status	Displays the status of each resume. Values are: <i>Awaiting Load,Draft, Success,Rejected,</i> and <i>Unresolved.Awaiting Load</i> appears for all resumes until the Resume Load Resume process completes. When the process completes the system assigns a status to each resume based on the status values that you specify in the On Successful Extraction and On Extraction Failure fields.
	Click a status link to access the Resume Management - Select Resume page, where you can view details for that resume. The statuses appear as links only after the process completes.

Additional Page Elements

Add Multiple Resumes	Click to browse for a zip file and upload all resumes from that zip file. You must have network access to where the zip file is located. The system removes this button from the page after you initiate the Resume Load Process.
Add Resume	Click to browse for and select a single file to upload. The system removes this button from the page after the process completes.
Load Resumes	Click to run the Load Resume process. After you click this button, all options on this page become display-only.
View Log for All Resumes	Click to access the Resume Management - Select Resume page, where you can view details for all resumes that were processed. This link appears only after the Load Resume process completes.

Managing Resumes

This section provides an overview of Resume Management, lists a prerequisite, and discusses how to:

- Manage resumes.
- View details for resumes.

Understanding Resume Management

Use the Manage Resumes (HRS_AL_LOG) component to view details for all resumes that the system receives via any channel. For each resume, you can view its source, channel, and status.

Prerequisite

Before you can manage resumes, the system must receive resumes from one of the valid channels.

See Chapter 23, "Managing Resumes," Understanding Resume Management, page 681.

Pages Used to Manage Resumes

Page Name	Definition Name	Navigation	Usage
Manage Resumes - Select Resume	HRS_AL_LOG	Recruiting, Administration, Manage Resumes, Manage Resumes - Select Resume	Manage resumes.
Resume Management Details	HRS_AL_LOG_DETAILS	Click the Details link for an applicant in the Search Results group box on the Manage Resumes - Select Resume page.	View details for resumes.
Open Integration Framework - Integration Log	HRS_HROI_LOG	Click the Integration Log link on the Resume Management Details page.	View transactions in the integration log for the applicant.
View Candidate XML	HRS_CANDIDATE_XML	Click the Candidate XML link on the Resume Management Details page.	View the final output of the resume extraction.

Managing Resumes

Access the Resume Management - Select Resume page (Recruiting, Administration, Manage Resumes, Resume Management - Select Resume).

Manage Resul	mes			
🗢 Search Criteria				
First Name:				
Last Name:				
Email Address:				
Source:	Special Promo		•	
Channel:			•	
Resolution State:			•	
*Date Type:	Original Submissio	n	•	
Start Date:	31			
End Date:	3	Se	arch	
Search Results	Cu	ustomize Find Vie	w All 🗖 I 🛗	First I 1-2 of 2 Last
Name	Source	Channel	Resolution State	Details
Maharoof Steyn	Special Promo	Apply Online	Success	Details
Kevin Beyley	Special Promo	Apply Online	Success	Details
Select All Deselect Al	<u>I</u>	Go		

Resume	Management	 Select 	Resume page	÷
--------	------------	----------------------------	-------------	---

Search Criteria

Use this group box to enter search criteria. Click Search to display the Search Results group box.

First Name and Last Name	Enter the partial or full first or last name of the applicant.
Email Address	Enter the email address of the applicant.
Source	Select a source. All sources that you set up by using the Source Setup component appear here.

Channel	Select a channel. Values are:
	<i>Apply Online:</i> Displays resumes that applicants attach when they apply for job openings online by using Candidate Gateway
	<i>Email:</i> Displays resumes that the system receives through an email account.
	<i>Integration Framework:</i> Displays resumes that the system receives through the OIF.
	<i>Load Resume:</i> Displays resumes that you uploaded through the Resume Load Process.
	<i>Manage Entry:</i> Displays resumes that you attach to applicants that you manually enter into the system by using the Add New Applicant component.
	Refer a Friend: This functionality is not available at this time.
Resolution State	Select a resume status. Values are: Awaiting Resolution, Draft, Rejected, Success, Unresolved with Errors.
Date Type, Start Date, and End Date	Select a date type and enter a start and end date to view resumes between those dates that meet the date type criteria.
	Date type options include:
	Notifications: Select to search based on the date a notification was sent.
	<i>Original Submission:</i> Select to search for resumes based on the date that the resume was originally submitted.
	<i>Resolution Updates:</i> Select to search for resumes based on the date that the resolution was updated.

Search Results

Use this group box to view the resumes that meet the search criteria. For each resume the system displays the applicant's name, the source, channel, and resolution state (resume status).

Details

Click to access the Resume Management Details page, where you can view details for the resume.

Additional Page Elements

Action and Go	Select an action and click Go. The system performs the action for all applicants that you select. For each action, the system logs a new row in the appropriate group box on the Resume Management Details page. Values are:		
	• <i>Reject:</i> The system updates the status to Reject.		
	Use this status for resumes that the resume extractor can't extract or work with.		
	• <i>Reject & Notify:</i> The system updates the status to Reject and sends a notification (HRS_HROI_REJECT) to all applicants.		
	Use the message catalog to modify the message text.		
	• <i>Send Notifications:</i> The system sends a notification (HRS_HROI_DRAFT, HRS_HROI_REJECT, HRS_HROI_SUCCESS, or HRS_HROI_UNRESOLVED) to the applicant.		
	The notification that the system sends depends on the status of the resume. If the resume is from a specific source, the system looks at the setup in the Notifications group box on the Vendor page to determine which notification to send. Use the message catalog to modify the message text. When the system sends the notification, it also adds a row to the Notification Log group box on the Resume Management Details page that describes details about the notification.		
	• View Applicants: Select to access the Manage Applicant page for the		

• *View Applicants:* Select to access the Manage Applicant page for the selected applicants.

Viewing Details for Resumes

Access the Resume Management Details page (on the Resume Management - Select Resume page, click the Details link for an applicant in the Search Results group box).

Resume Management Details							
Name:	Ma	Maharoof Steyn					
Email:	H	CMGENUs	er1@ap6023f	ems.us.o	racle.com		
Vendor S	endor Source: Channel: Apply Online					nline	
Resume File: None							
Source I	Source History Customize Find 🗖 🛗 First 🖬 1 of 1 🕨 Last						
Marketing	g Source	Subsourc	e		Last Updated	Last Updated By	
Special P	Special Promo Promo 1				02/10/09 2:48PM	SAMPLE	
Resolution History Customize Find 🖉 🛗 First 🚺 1 of 1 🖸 Last							
Channel	Site ID		Resolution State	Resolution Description		Last Updated	
AO	Default Site		Success			02/10/2009 2:48PM	
Action: Return					Go		

Resume Management Details page

Name	Click the applicant's name link to access the Manage Applicant page for that applicant.
Source	Displays the vendor recruitment source. The system populates this field only when a resume channel is email or OIF.
Resume File	Click the resume file link to open and view the resume in a separate browser window. To successfully open the file, you must have the application that the resume was created in installed on your computer.

Extraction History

Use this group box to view resume extraction history details, included the resume extractor vendor, the status of the extraction, and the time in which the extraction took place. This group box appears on this page only if the resume has been extracted.

Integration Log	Click to access the Open Integration Framework - Integration Log, where you can view all transactions for the extraction.
Candidate XML	Click to access the View Candidate XML page, where you can view the final output of the resume extraction.

Notification Log

Use this group box to view the notifications that the system sends to the applicant. Each time you send a notification to the applicant, the system adds a new row that describes which template was used and to whom the notification was sent. This group box does not appear on the page unless the system has sent a notification to the applicant.

Source History

Use this grid to view details about the marketing recruitment sources and subsources that are associated to this resume.

Resolution History

Use this grid to view resolution history for the resume.

Additional Page Elements

Action and Go	Select an action and click Go. Values are:
	<i>Edit Applicant:</i> Select to access the Manage Applicant page, where you can view and modify the applicant's information.
	Refresh: Select to refresh the page.
	<i>Send Notification:</i> The system sends a notification (HRS_HROI_DRAFT, HRS_HROI_REJECT, HRS_HROI_SUCCESS, or HRS_HROI_UNRESOLVED) to the applicant. The notification that the system sends depends on the status of the resume. If the resume is from a specific source, the system looks at the setup in the Notifications group box on the Vendor page to determine which notification to send. Use the message catalog to modify the message text. When the system sends the notification, it also adds a row to the Notification Log group box that describes details about the notification.

Chapter 24

Managing Employee Referral Programs

This chapter provides an overview of the employee referral program process and discusses how to:

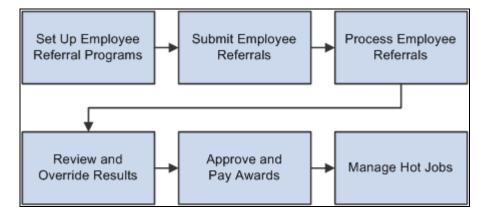
- Set up employee referral programs.
- Submit employee referrals.
- Run the employee referral process.
- Review and override the results.
- Approve and pay awards.
- Manage hot jobs.

Understanding the Employee Referral Program Process

Setting up and administering the employee referral program process includes the following tasks:

- 1. Set up employee referral programs.
- 2. Submit employee referrals.
- 3. Process employee referrals.
- 4. Review and override results.
- 5. Approve and pay awards.
- 6. Manage hot jobs.

The following diagram illustrates the task flow for setting up and administering employee referral programs.



Business process for setting up and administering employee referral programs

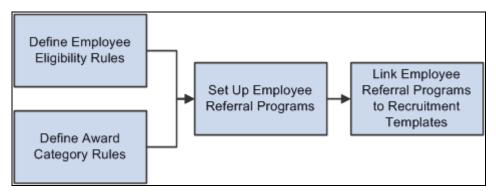
Setting Up Employee Referral Programs

This section provides an overview of employee referral program setup steps and discusses how to:

- Define employee eligibility rules.
- Define award category rules.
- Define employee referral programs.

Understanding How to Set Up Employee Referral Programs

The following diagram shows how to set up employee referral programs by defining employee eligibility rules and award category rules, using those rules to create referral programs, and linking the programs to recruitment templates:



Process for setting up employee referral programs and linking the programs to recruitment templates

To set up employee referral programs:

1. Define employee eligibility rules using the Employee Eligibility Rules (HRS_RULE_ELIG) component.

Employee eligibility rules define the conditions under which an employee is eligible for award payment under the employee referral program. For example, you might want to limit eligibility to employees who work in a particular geographic area or type of job. You might want to exclude employees in certain departments or locations. You can create a rule that combines a number of criteria to determine employee eligibility.

To define employee eligibility rules:

- a. Name and describe the employee eligibility rule on the Employee Eligibility Rules page.
- b. Create SQL statements for the employee eligibility rule on the Employee Eligibility Rules Rule SQL page.
- 2. Define award category rules using the Award Category Rules (HRS_RULE_AWD) component.

When you define the award category rules, you're defining the job openings that qualify for awards in the category and the amounts and timing of awards for the category. You can create any number of award categories, each with an award schedule. The job opening that the applicant is hired into determines the award category for the referring employee's award.

You should define categories so that each job opening (for which you want to have an employee referral program award) falls into only one category. Job openings that do not fall into any category cannot be processed for employee referrals.

To define award category rules:

- a. Name and describe the award category rule on the Award Category Rules page.
- b. Create SQL statements for the employee eligibility rule on the Award Category Rules Rule SQL page.
- c. Define the amounts, timing, and earnings code for the rule on the Award Schedule page.
- 3. Define employee referral programs using the Employee Referral Program (HRS_REF_PGM) component.

To define employee referral programs:

- a. Name the employee referral programs.
- b. Set up additional criteria.
- c. Link employee eligibility and award category rules.
- 4. Associate an employee referral program with a recruitment template using the Recruitment Template (HRS_RCTR_TMPL) component.

By linking a referral program to a recruitment template, the system will automatically associate a referral program with a job opening when the job opening is created. In turn, the system uses this employee referral program's rules to evaluate eligibility and pay awards for the job opening.

Pages Used to Set Up Employee Referral Programs

Page Name	Definition Name	Navigation	Usage
Employee Eligibility Rules	HRS_RULE_DEF	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Eligibility Rules, Employee Eligibility Rules	Name employee eligibility rules.
Employee Eligibility Rules - Rule SQL	HRS_RULE_SQL	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Eligibility Rules, Rule SQL	Create SQL statements for employee eligibility rules.
View SQL	HRS_VW_SQL	 Click the View SQL link on the Employee Eligibility Rules - Rule SQL page. Click the View SQL link on the Award Category Rules - Rule SQL page. Click the View SQL link on the Hot Job Administration - Selection page. 	View a SQL statement that the system generates from information that you enter on the Employee Eligibility Rules - Rule SQL page.
Award Category Rules	HRS_RULE_DEF	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Award Category Rules, Award Category Rules	Name award category rules.
Award Category Rules - Rule SQL	HRS_RULE_SQL	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Award Category Rules, Rule SQL	Create SQL statements for award category rules.

Page Name	Definition Name	Navigation	Usage	
View SQL	HRS_VW_SQL	 Click the View SQL link on the Employee Eligibility Rules - Rule SQL page. Click the View SQL link on the Award Category Rules - Rule SQL page. Click the View SQL link on the Hot Job Administration - Selection page. 	View a SQL statement that the system generates from information that you enter on the Employee Eligibility Rules - Rule SQL page.	
Award Schedule	HRS_RULE_AWD_SCH	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Award Category Rules, Award Schedule	Define award schedules.	
Employee Referral Programs	HRS_REF_PGM_PG	Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Referral Program, Employee Referral Programs	Define employee referral programs.	
Employee Referral Program HRS_REF_PGM_CRT - Criteria		Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Referral Program, Criteria	Define additional criteria that are not covered by employee eligibility or award category rules.	
Employee Referral Program HRS_REF_PGM_RUL - Rules		Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Referral Program, Rules	Select employee eligibility and award category rules that are in effect for the program.	
Employee Eligibility Rule HRS_RULE_ELIG_SP		Click the View Description link in the Employee Eligibility Rules group box on the Employee Referral Program - Rules page.	View a description of the employee eligibility rule. The description that you entered in the Long Description field on the Employee Eligibility Rules page appears here.	
Award Category Rule	HRS_RULE_AWD_SP	Click the View Description link in the Award Category Rules group box on the Employee Referral Program - Rules page.	View a description of the award category rule. The description that you entered in the Long Description field on the Award Category Rules page appears here.	

Naming Employee Eligibility Rules

Access the Employee Eligibility Rules page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Eligibility Rules, Employee Eligibility Rules).

Rule ID: KU_EE_HD02 *Description: US ERP - Hir Dt 02
LIS ERP - Hir Dt 02
*Description: USERP - Hil DL02
*Short Description: US ERP-H02
Long Description: US ERP - Hire Date Rule 02
Employees based in the US who are not in the HR dept. and are either
1. Active as of the referral date - OR -
employee on leave for maternatiy or millitary.

Employee Eligibility Rules page

Long Description Enter a description of the employee eligibility rule. This description appears on the Employee Eligibility Rule page in the Employee Referral Program component.

Creating SQL Statements for Employee Eligibility Rules

Access the Employee Eligibility Rules - Rule SQL page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Eligibility Rules, Rule SQL).

Rule ID:	KU_EE_HD02	De	scription:	US ERP	- Hir Dt 02	2						
Eligibility Se	election Criteria											
Open (Record	*Field Name	*Operator	Se	et ID	Action	Value		Boolean	Close)		
1 🛛 🔻	HRS_JOB_I2	EMPL_STATUS	Equal To	•			A	0	AND	-	+	-
2 🤇 🔽	HRS_JOB_I2	EMPL_STATUS	Equal To	•			L	0	AND -	-	+	-
3 🔵 🔽	HRS_JOB_I2	ACTION_REASON	Equal To	-		Leave of -	MIL	9	AND -	-	+	-
4 💌	HRS_JOB_I2	ACTION_REASON	Equal To	-		Leave of -	MAT	9	AND -))) 💌	+	-
5 💌	HRS_JOB_I2	REG_REGION	Equal To	-			USA	9	AND -	-	+	-
6 💌	HRS_JOB_I2	DEPTID	Not Equal To	▼ S	HAR		10000	Q	-	-	+	-

Employee Eligibility Rules - Rule SQL page

Open (and Close) (open and close parentheses)	Use these fields to add parentheses around clauses in your selection criteria. The drop-down list box offers separate values with one to five parentheses so that you can create nested groups of clauses.					
	Important! Be sure to properly close all parentheses.					
Record and Field	Select the record and field that hold the data to be evaluated.					
	Select one of these records:					
	• <i>HRS_EMPLOYMT_I</i> contains four employment-related fields: hire date, last date worked, rehire date, and termination date.					
	• <i>HRS_JOB_I2</i> contains several job-related fields, including (but not limited to) action, action reason, business unit, company, department, employee type, pay group, regulatory region, full time/part time status, regular/temporary status, and standard hours.					
Operator	Enter the operator to indicate how you are going to evaluate the data in the selected field. Select from these options:					
	• Equal To					
	• Greater Than					
	• Greater Than or Equal to					
	• LIKE					
	• Less Than					
	• Less Than or Equal To					
	• Not Equal To					

Set ID	If setID is a key for the record and field that you selected, select the setID for the value that the clause evaluates. This field does not appear if setID is not a key.
Action	If you are evaluating data in the Action/Reason field (that is, you selected <i>HRS_JOB_I2</i> as the record and <i>ACTION_REASON</i> as the field), use this field to select an action.
Value	Enter a value that corresponds with the record, field, and operand that you selected. You can enter either a static string or select a value from a list of valid values for the field. When selecting from a list, you are limited to values from the setID, if any, that you entered.
	If you are evaluating the Action/Reason field, select a reason that is associated with the action you selected.
Boolean	For every grid row except the last one, select <i>AND</i> or <i>OR</i> to link the clauses in the grid.
View SQL	Click to access the View SQL page, where you can view the SQL generated by the values that you entered for this rule definition.

Naming Award Category Rules

Access the Award Category Rules page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Award Category Rules, Award Category Rules).

Award Category Rules	Rule SQL Award Schedule	
Rule ID:	KC_AWD_01A	
*Description:	Can ERP - Award Category 01A	
*Short Description:	Can Awd01A	
Long Description:	Canadian ERP - Award category for Canadian-based sales job requisitions	2
	Can\$4,000 after one year.	

Award Category Rules page

Long Description Enter a description of the award category rule. This description appears on the Award Category Rule page in the Employee Referral Program component.

Creating SQL Statements for Award Category Rules

Access the Award Category Rules - Rule SQL page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Award Category Rules, Rule SQL).

Award Selection Criteria					
Open (Record *Field Name	*Operator	Set ID Value	Boolean	Close)	
1 HRS_JOB_I2 REG_REGION 2 HRS_JOB_I2 DEPTID	Equal To	CAN SHAR 22000			+ - + -

Award Category Rules - Rule SQL page

The steps that you use to construct a rule are the same as the steps that you use on the Employee Eligibility Rules - Rule SQL page.

For award category rules, the records are HRS_EMPLOYMT_I, HRS_JOB_I2, HRS_JO_I, or HRS_PSTBTH_I.

See <u>Chapter 24</u>, "Managing Employee Referral Programs," Creating SQL Statements for Employee <u>Eligibility Rules</u>, page 704.

Defining Award Schedules

Access the Award Schedule page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Referral Program, Employee Referral Programs).

Categ	ory Rules	Rule SQL	Award Sched	ule			
):	NAV	VARD89		Description:	8.9	CORE Award (Category
-	ue.	Dollar	▼	Award Total:			
d Sche	edule			Customize Find	<u>د</u> م	First 🚺 1-3	of 3 🕨 Last
gs	*Duration	*Туре	*Award Value	Description		Gross-Up	
9	7	Days 💌	1,000.00	1000 USD 7 days afte	r hire		+ -
	3	Months -	1,500.00	1500 USD 3 months a	after h		+ -
0	1	Years 💌	2,500.00	2500 USD 1 year after	hire		+ -
): hcy Co d Schu gs Q Q	acy Code: US d Schedule gs *Duration Q 7 Q 3	D: NAWARD89 Acy Code: US Dollar d Schedule gs *Duration *Type Q 7 Days 3 Months	D: NAWARD89 Incy Code: US Dollar d Schedule gs *Duration ? 7 Days 1,000.00 3 Months	Description: Description:	b: NAWARD89 Description: 8.9 ncy Code: US Dollar Award Total: 5,00 d Schedule Customize Find P 9 gs *Duration *Type *Award Value Description Q 7 Days 1,000.00 1000 USD 7 days after hire Q 3 Months 1,500.00 1500 USD 3 months after t	Description: 8.9 CORE Award Control Award Total: 5,000.00 Award Total: 5,000.00 Award Total: 5,000.00 Customize Find P First 1.3 (Customize Find P Find P First 1.3 (Customize Find P First 1.3 (Customize Find P First 1.3 (Customize Find P Find P First 1.3 (Customize First 1.3 (Cust

Award Schedule page

Currency Code	Select the currency that is used to define awards in this category. Valid values are <i>Canadian Dollar</i> and <i>US Dollar</i> . You can override the currency on the Referral Award Details page.				
	Important! Employee referral program rewards are paid to employees in the currency that corresponds to where the employee is located. Recruiting Solutions and PeopleSoft Payroll for North America do not provide currency conversion. For example, if you define the award as 100.00 CAD, but the employee that receives the award is normally paid in US dollars, Payroll for North America will pay an award of 100.00 USD to the employee.				
Award Total	Displays the total of all awards in the schedule. Click the refresh button to update the award total.				
Earnings Code	If you use the delivered integration with Payroll for North America to pay employee referral award, you must select the earnings code associated with the award. This field appears only if Payroll for North America is installed. Define earnings codes by using the Earnings Table (EARNINGS_TABLE) component.				
Duration and Type	Enter the time period that the referring employee must wait until the award is payable. You can enter the time period in days, months, or years. To calculate the date on which the reward is payable, the system begins with the date that the applicant is hired or rehired and adds the duration time period. This is referred to as the award date and is the date on which the duration requirement is fulfilled; it is not necessarily the date on which the award is paid. If you use the delivered integration with Payroll for North America to pay employee referral award, the system will not send award information before the award date.				
Award Value	Enter the amount of a cash award or the value of a noncash award.				

Gross-Up

Select this check box if the award should be grossed up.

Defining Employee Referral Programs

Access the Employee Referral Programs page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Referral Program, Employee Referral Programs).

Employee Referral Programs <u>Criteria</u> <u>R</u> ules							
Referral Program ID: KC_ERP_01							
General Program Information	Find View All First 🗷 1 of 1 🗈 Last						
*Effective Date: 01/01/1999	Status: Active						
*Description: ERP for Candian-based jobs	Short Desc: Can ERP 01						
 Require Approval for Payment Separate Check Allow Dups to Exceed Original Use Program As Of: Referral Date 							
Allow Dups to Exceed Original Use Program As Of: Referral Date Long Employee Referral Program (ERP) for Canadian-based job requisitions. Description: Image: Comparison of the second seco							

Employee Referral Programs page

Effective Date	Enter an effective date. The system uses the effective date with the Use Program As Of field to determine the rules that are in effect for a referral.
Require Approval for Payment	Select this check box to require approval for an award before the award is sent to the payroll system. Awards that have an Approved status can be submitted for payment. If you select this option, the system assigns a Needs Approval status to an award when the award is created. Users must manually approve the award on the Approve Employee Awards page. If you deselect this check box, awards are automatically given Approved status when they are created.
Separate Check	Select this check box if you want the award paid separately from the employee's regular paycheck. If you are paying awards through Payroll for North America, all grossed-up awards are paid by a separate check.
Allow Dups to Exceed Original (allow duplicates to exceed original)	Select this check box if the total award can exceed the original award amount when an award is split among several referring employees.

Use Program As Of Select which effective-dated program rules apply to the referral. Valid values are *Applicant's Hire Date* and *Referral Date*. The system applies all program rules that are in the effective-dated row that is active as of the Use Program As Of date. For example, an employee referred an applicant on December 1 and that applicant was hired on February 1 of the following year. However, the ERP rules changed on January 1 from \$100 for all successful referrals before January 1 to \$1000 for those on or after January 1. If the Use Program As Of field is set to Referral Date, the employee is entitled to only \$100 since the referral was made before January 1. If the field is set to Applicants Hire Date, the employee is entitled to \$1000 since the applicant was hired after January 1.

Note. This field is only available when a new employee referral program is created. After saving the employee referral program, the value in subsequent effective-dated rows cannot be changed.

Defining Additional Criteria

Access the Employee Referral Program - Criteria page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Referral Program, Criteria).

Employee Referral Programs Criteria	Rules
Referral Program ID: KC_ERP_01 Program Criteria	Find View All First 1 of 1 D Last
Effective Date: 01/01/1999 Limit Referral Life Span To	Description: ERP for Candian-based jobs
*Limit Interval: Months	Applicant Reports to Employee
Interval Duration: 2	Employee Exceeds Manager Level: Vice President
Applicant Criteria	
Allow Previous Employees	Allow Family Member Referrals
*Termination Interval: Months	
Interval Duration: *Is Prior To:	1 Hire Date

Employee Referral Program - Criteria page

Limit Referral Life Span To

Limit Interval and Limit Duration	Enter a time limit for how soon after the referral the applicant must be hired. The limit interval can be measured in <i>Months, Years,</i> or <i>Days.</i> The limit duration is the number of months, days, or years.
	For example, if employees get referral credit for applicants who are hired within two months of the referral, enter <i>Months</i> as the limit interval and 2 as the limit duration.

Disqualify Award If

Use this group box to indicate conditions that disqualify the employee from the referral program.

Applicant Reports to Employee	Select this check box to disqualify employees if the applicant reports to them directly or indirectly based on the department tree structure as of the applicant's hire date. If you use this rule, you must set up the department tree structure in PeopleSoft Human Resources.
Employee Exceeds Manager Level	Select a value to disqualify employees above the specified level. The system evaluates employee levels as of the applicant's hire date.
	To make all managers ineligible, select All Other Positions.
	If you use this rule, you must set up the department tree structure in Human Resources.
Applicant Criteria	

Allow Previous Employees	Select this check box to give referral credit for applicants who are previous
	employees. If you select this check box, you must complete the termination
	interval fields in this group box.

Termination Interval, Interval Duration, and Is Prior To	If you allow referral credit for previous employees, use these fields to define how long the applicant must have been away from the organization before being rehired. The system evaluates this criteria based on information that users provide when they refer friends online or information that recruiters enter for an applicant on the applicant data pages. It does not check the organization's historical records.
	To allow credit for all rehires, regardless of the length of the break in service lasted, enter 0 in the Interval Duration field.
	To set a minimum duration for the break in service, use the Termination Interval field to select <i>Months,Days</i> , or <i>Years</i> , and then enter the number of months, days, or years in the Interval Duration field. Use the Is Prior To field to indicate whether the <i>Applicant's Hire Date</i> or the <i>Referral Date</i> is used as the starting point for the look-back.
	For example, if you allow referral credit for rehires only if the rehire was away for your organization at least six months before being referred, enter <i>Months</i> as the termination interval, <i>6</i> as the interval duration, and <i>Referral Date</i> as the Is Prior To setting.
Allow Family Member Referrals	Select this check box to allow employees to refer members of their family.

Selecting Employee Eligibility and Award Category Rules

Access the Employee Referral Program - Rules page (Set Up HRMS, Product Related, Recruiting, Recruitment Sources, Employee Referral Program, Rules).

Effective Date: 01/01/1999 Description: ERP for Candian-based jobs Employee Eligibility Rules Customize Find View All P First I 1-2 of 2 Last *When to Apply *Rule ID Description View Description View Rule Applicant's Hire Date KC_EE_HD(Can ERP - Hir Dt 01 View Description View Rule + Award Date KC_EE_ADI Can ERP - Awd Dt 01 View Description View Rule + - Award Category Rules Customize Find View All P First I 1-2 of 2 Last	Employee Referral Program	ns <u>C</u> riteria	Rules			
Effective Date: 01/01/1999 Description: ERP for Candian-based jobs Employee Eligibility Rules Customize Find View All P First 1-2 of 2 Last *When to Apply *Rule ID Description View Description Applicant's Hire Date KC_EE_HD(Can ERP - Hir Dt 01 View Description View Rule Award Date KC_EE_ADD Can ERP - Awd Dt 01 View Description View Rule Award Category Rules Customize Find View All P First 1-2 of 2 Last	Referral Program ID:	KC_ERP_01				
Effective Date: 01/01/1999 Description: ERP for Candian-based jobs Employee Eligibility Rules Customize [Find] View All []]] First] 1-2 of 2] Last *When to Apply *Rule ID Description View Description View Rule Applicant's Hire Date KC_EE_HD Can ERP - Hir Dt 01 View Description View Rule I Award Date KC_EE_ADC Can ERP - Awd Dt 01 View Description View Rule I I Award Category Rules Customize [Find] View All []] First] 1-2 of 2] Last	Program Rules			Find Vie	ew All 🛛 First 🚺 1	l of 1 🗈 Last
*When to Apply *Rule ID Description View Description View Rule Applicant's Hire Date KC_EE_HDQ Can ERP - Hir Dt 01 View Description View Rule + - Award Date KC_EE_ADQ Can ERP - Awd Dt 01 View Description View Rule + - Award Category Rules Customize Find View All Image: Find View All Image: Find 1-2 of 2 Last	Effective Date:	01/01/1999	Description			
Applicant's Hire Date KC_EE_HDI Can ERP - Hir Dt 01 View Description View Rule • • Award Date KC_EE_ADI Can ERP - Awd Dt 01 View Description View Rule • • Award Category Rules Customize Find View All Image: Find First 1-2 of 2 Last	Employee Eligibility Rules		<u>Customize</u>	<u>Find</u> View All 🗖	🖩 First 🚺 1-2 (of 2 🕨 Last
Award Date KC_EE_ADD Can ERP - Awd Dt 01 View Description View Rule + - Award Category Rules Customize Find View All Image: First Image: Firs	*When to Apply	*Rule ID	Description	View Description	View Rule	
Award Category Rules Customize Find View All Image: First	Applicant's Hire Date	KC_EE_HD	Can ERP - Hir Dt 01	View Description	View Rule	+ -
	Award Date 💌	KC_EE_ADO	Can ERP - Awd Dt 0	1 <u>View Description</u>	View Rule	+ -
	Award Category Rules		<u>Customize Fin</u>	id View All 🗖 🛗	First 🚺 1-2 of 2	Last
*Priority *Rule ID Description View Description View Rule	*Priority *Rule ID	Description		View Description	View Rule	
100 KC_AWD_01 Can ERP - Award Category 01A View Description View Rule Image: Second Second	100 KC_AWD_01	Can ERP - A	ward Category 01A	View Description	View Rule	+ -
200 KC_AWD_02 Can ERP - Award Category 02A View Description View Rule	200 KC_AWD_02	Can ERP - A	ward Category 02A	View Description	View Rule	+ -

Employee Referral Program - Rules page

Employee Eligibility Rules

When to Apply	Select when to apply each employee eligibility rule that you associate with this program. Valid values are <i>Applicant's Hire Date,Award Date</i> , and <i>Referral Date</i> . You can select each of the three values only once for a maximum of three rows. The system uses the rule that you associate with the award date to check eligibility before paying any award in the award category award schedule or in a hot job award schedule.
	This field enables you to apply different employee eligibility rules at different points in the referral process. For example, you might want to apply strict employee eligibility rules at the time that the applicant is hired, but on the award date, you might only require that the employee have an Active status.
Rule ID and Description	Select the rule that you want to apply. The system populates the Description field automatically. Valid values are the rules that you set up in the Employee Eligibility Rules component.
View Description	Click to access the Employee Eligibility Rule page, where you can view the description that you entered in the Long Description field on the Employee Eligibility Rules page.

View Rule	Click to access the Employee Eligibility Rules component, where you defined the employee eligibility rule. Use your browser's back button to return to the Employee Referral Program - Rules page.
Award Category Rules	
Priority	Enter an integer in this field to tell the system in what order to process the award category rules. The system checks the job opening that the applicant is hired into against the category rules in the priority order. As soon as it finds the job opening in a category, it stops processing that job opening and applies the award schedule for that category.
	You should make the award category rules mutually exclusive so that a job opening does not fall into multiple categories.
	The system does contain safeguards against paying an employee in multiple award categories for the same applicant.
	If a job opening does not fall into any award category, no awards are scheduled or paid.
Rule ID and Description	Select the rule that you want to apply. The system populates the Description field automatically. Valid values are the rules that you set up in the Award Category Rules component. You can assign as many rules to the program as you want, each with a unique priority number. Do not select the same rule more than once.
View Description	Click to access the Award Category Rule page, where you can view the description that you entered in the Long Description field on the Award Category Rules page.
View Rule	Click to access the Award Category Rules component, where you defined the award category rule. Use your browser's back button to return to the Employee Referral Program - Rules page.

Submitting Referrals

This section provides an overview of employee and applicant referrals and lists the pages used to submit, confirm, and review referrals.

Understanding Employee and Applicant Referrals

The two referral methods are:

• The employee submits application information.

Employees refer applicants through employee self-service and can review the eligibility and payment status of the referrals that they submit.

• The applicant identifies the referring employee when submitting an application.

Referral sources can be included in applications regardless of who adds the application to the system:

- External applicants can submit referral information when they apply for jobs online.
- Recruiters who manually add applications to the system can include referral source information in the application.

Employee-Initiated Referrals

Employees use the recruiting self-service pages to refer an applicant. An employee submits a referral as follows:

1. The employee clicks the Refer Friend button on the Careers Home, Job Search, or My Saved Jobs selfservice page.

An employee can refer an applicant for a specific job opening by selecting a job on the Careers Home, Job Search, or My Saved Jobs page before clicking the Refer Friend button, or by clicking the Refer Friend button on the Job Description page.

2. The employee selects a resume option and clicks Continue on the Refer Friend - Choose Resume page.

The resume options depend on the resume template and can include:

• Copy and paste resume text.

If employees select this option, the Refer Friend - Enter Resume Text page appears. Employees enter a name for the resume in the Title field, select the language in which the resume is written in the Language field, and paste the resume text into the Resume field and click Continue.

• Upload friend's resume.

If employees select this option, they must browse for, select, and upload the applicant's resume.

- Refer friend without submitting a resume.
- 3. The employee enters the preferred contact method, name, address, email, and phone information for the applicant that they are referring on the Refer Friend Contact Details page.

At a minimum, employees must enter a first and last name for the applicant.

4. The employee clicks the Save & Submit button on the Refer Friend - Contact Details page.

The system creates an active applicant record for the applicant, sets the applicant's disposition to Draft, and sets the referral source to employee.

The system also sends an email to the applicant using the email address that the employee provided. The email includes a URL that enables applicants to access the draft application that the referral process created. To access and submit their online job applications, applicants must register to create a Candidate Gateway account.

Note. The application remains in Draft status until the applicant accesses it and submits it. The employee who is referring the applicant cannot submit the application on behalf of the applicant.

Applicant-Provided Referral Information

When applicants apply for job openings online, they can specify referral information if you include the Referrals section in the resume template for that job opening.

See Chapter 9, "Setting Up Recruiting Templates," Setting Up Resume Templates, page 133.

When applicants refer employees online:

1. The applicant selects an Employee type recruitment source in the How did you find out about the job? field in the Referral Information group box on the Apply Now - Complete Application page.

Applicants can select Employee and Marketing type recruitment sources as a referral source in the How did you find out about the job? field. When an applicant selects an Employee type recruitment source, the system adds the Referral Name,Email Address, and Member of your family fields to the group box, which enable the applicant to specify the employee's name, email address, and whether that employee is a family member.

2. The employee receives an email that requests confirmation of the referral, if the applicant entered an email address for the employee.

The email includes a link to the Confirm Referral page with the track ID and password that the employee can use to access the referral and confirm or cancel the referral. The email also contains a link to the Review Referral page, where the employee can track the status of the referral.

An employee's failure to confirm or cancel the referral does not affect the recruitment process for the applicant. However, if the employee does not confirm the referral, the employee is not eligible to receive award payments for the referral.

Recruiters can enter an employee as the referral source for an applicant when they manually add an applicant by using the Add New Applicant (HRS_ADD_APPLICANT) component. Recruiters enter referral information in the Referral Source group box on the Add New Applicant - Application Details page. Recruiters can update referral information for an applicant in the Referral Source group box on the Manage Applicant - Application Details page.

See Chapter 15, "Entering Applicant Data," Entering Application Details, page 363.

See Also

PeopleSoft Candidate Gateway 9.1 PeopleBook, "Using Candidate Gateway," Entering Referrals

PeopleSoft Candidate Gateway 9.1 PeopleBook, "Using Candidate Gateway," Applying for Jobs

Pages Used to Submit, Confirm, and Review Referrals

Page Name	Definition Name	Navigation	Usage
Refer Friend - Choose Resume	HRS_ERP_RES_OPTION	Self Service, Recruiting Activities, Careers, Careers Home Click the Refer Friend button on the Careers Home page.	Choose a resume option. The options that appear on this page vary depending on the resume template that the system selects, but can include Copy and paste resume text, Upload friend's resume, and Refer friend without resume.
Refer Friend - Enter Resume Text	HRS_ERP_APPLY_RES	Select the Copy and paste resume text option on the Refer Friend - Choose Resume page and click Continue.	Enter resume details.
Refer Friend - Contact Details	HRS_ERP_APP_PRFILE	 Click the Continue button on the Refer Friend - Enter Resume Text page. Select the Refer friend without resume option on the Refer Friend - Choose Resume page and click Continue. Select the Upload friend's resume option on the Refer Friend - Choose Resume page, click Continue, then complete the upload process. 	Enter a friend's name, address, email, and phone information.
My Referrals	HRS_ERP_APP_APLC	Click the Save & Submit button on the Refer a Friend - Contact Details page.	Confirm that the referral is submitted.
Confirm Referral - Access	HRS_REF_CONFIRM1	Self Service, Recruiting Activities, Confirm Referral, Confirm Referral- Access Page	Enter the referral track ID and password received by email.
Confirm Referral	HRS_REF_CONFIRM2	Click the Submit button on the Confirm Referral - Access page.	Confirm or cancel the referral initiated by an applicant.
Confirm Referral - Submit Confirmation	HRS_SUBMIT_CONF	Click the Refer this Applicant button on the Confirm Referral page.	Confirm that the referral was successfully submitted.

Page Name	Definition Name	Navigation	Usage
Confirm Referral - Referral Cancelled	HRS_CNCL_CONF	Click the Cancel button on the Confirm Referral page.	Confirm that the referral was successfully cancelled.
Review Referral	HRS_EE_REVW_SRCH	 Self Service, Recruiting Activities, Check Referral Status, Review Referral Click the View Completed Referrals link on the My Referrals page. 	View the current status of referrals. You can view the eligibility and award payment status for each applicant that you refer.
Review Referral - Details	HRS_EE_REVW_DTL	Click a name link on the Review Referral page.	View details for a specific referral.

Processing Employee Referrals

This section provides overviews of the Employee Referral Program (HRS_ERP_MAIN) process and payment statuses and discusses how to process eligibility and awards.

Understanding the Employee Referral Program Process

When you set up employee referral programs, you capture time-sensitive rules that dictate eligibility and awards for each referral under the particular employee referral program. The Employee Referral Program process applies these time-sensitive rules at the appropriate times in a referral's life span.

It is necessary to establish which employee referral program a referral is associated with before determining eligibility and awards. This association occurs only when an applicant is hired into a job opening that has an employee referral program associated. Therefore, you cannot determine eligibility and awards before an applicant is hired.

You can run the Employee Referral Program process for a specific employee referral program or for all employee referral programs. The Employee Referral Program process determines eligibility, creates awards, and processes award payments through PeopleSoft Payroll for North America, depending on the options that you select on the run control page. If you select the Eligibility and Awards Rules option on the Process Referral Programs page, the system determines whether the referring employee is eligible for employee referral program awards and determines the amount and timing of awards. If you select the Interface to Payroll for NA option, the system processes award payments through Payroll for North America.

See Chapter 24, "Managing Employee Referral Programs," Approving and Paying Referral Awards, page 734.

Eligibility Processing

The Employee Referral Program process checks employee eligibility according to the rules and criteria set up in the employee referral program for the following three dates:

• Referral date.

- Hire date.
- Award date.

You associate rules with these dates by using the When to Apply field on the Employee Referral Program -Rules page in the Employee Referral Program (HRS_REF_PGM) component. Criteria apply at various times depending on the particular criteria or on how you set up the program. This table shows the dates for which the rules and criteria are processed:

Rule or Criterion	Referral Date	Hire Date	Award Date
Employee eligibility rules	Determined by the value in the When to Apply field on the Employee Referral Program - Rules page.	Determined by the value in the When to Apply field on the Employee Referral Program - Rules page.	Determined by the value in the When to Apply field on the Employee Referral Program - Rules page.
Award category rules	NA	Applies	NA
Referral life span criteria	NA	Applies (checks the referral life span value in the Limit Referral Life Span To field on the Employee Referral Program - Criteria page against the time elapsed between the referral and hire dates).	NA
Employee is a direct or indirect manager of the hired applicant	NA	Applies if the Disqualify if applicant reports to the referring employee option is selected on the Employee Referral Program - Criteria page.	NA
Manager level criteria	NA	Applies (checks the value in the Disqualify employee if their Manager Level is greater than or equal to field on the Employee Referral Program - Criteria page).	NA
Previous employee criteria	May apply, depending on whether the Allow Previous Employees option is selected and on the value in the prior to the field on the Employee Referral Program - Criteria page.	May apply, depending on whether the Allow Previous Employees, option is selected and on the value in the prior to the field on the Employee Referral Program - Criteria page.	NA

Rule or Criterion	Referral Date	Hire Date	Award Date
Family member referral criteria	NA	Applies if the Allow Family Member Referrals option is selected on the Employee Referral Program - Criteria page.	NA
Applicant must be actively employed	NA	Applies	Applies

When Eligibility is Not Recalculated

The Employee Referral Program process does not recalculate eligibility for every referral in an employee referral program every time that it runs. It does not process or reprocess eligibility under the following conditions:

- The applicant has not been hired.
- The referral has been processed and marked ineligible.
- The referral was processed and marked eligible as of the hire date, but the award date has not been reached when the process runs again.
- The eligibility status has been overridden and not marked as a reprocess.

Reprocessing Eligibility for Duplicate Applicants

Duplicate applicant records can result in erroneous employee referral program eligibility results after the applicant data is merged. Before the duplicate applicant records are merged, there can be multiple distinct applicant records and multiple distinct referral records all for the same applicant. After merging, there is only one applicant record, but the system maintains multiple referral records. You must run the Employee Referral Program process again to make sure the eligibility status is correct because the original results were based on an unmerged data set. You can override eligibility on the Administer Referrals (HRS_REF_ADMN) component and rerun the Employee Referral Program process, if necessary.

You can distribute the referral award among multiple eligible employees on the Review Duplicate Referrals page.

Awards Processing

After checking eligibility, the Employee Referral Program process begins award processing if the referral meets both of the following conditions for a particular employee referral program:

- Applicant is hired.
- Employee is eligible as of the referral date (if any rules apply) and as of the applicant's hire date.

During award processing, the system:

- 1. Checks the job opening that the applicant was hired into against the employee referral program's award category rules.
 - a. If the job opening *is not* in any of the award categories, the process sets the eligibility status to Ineligible and issues a message that the job opening is not covered by the employee referral program.
 - b. If the job opening *is* in an award category, the process schedules awards.

The first award category rule that the job opening satisfies determines the award schedule.

For example, if you define an award category rule for IT jobs and another for Executive Level jobs, an IT Executive level job would be associated with the rule that is first in the list of award categories.

2. Checks hot jobs.

If the job opening is a hot job, the hot job award schedule overrides the award schedule of the employee referral program award category rule.

Understanding Payment Statuses

This table describes payment status values that you might see in the Payment Status field when viewing employee referral program award data. Unless otherwise specified, *payroll* refers to PeopleSoft Payroll for North America only:

Payment Status	Description	Process that Writes Status
Approved - Goes to Payroll (AP)	Approved award that has not yet been submitted for payment.	 Entered by the Employee Referral Program process if you select Eligibility and Awards Rules on the Process Referral Programs page and deselect the Require Approval for Payment option on the Employee Referral Program - Employee Referral Programs page. Entered manually on the Referral Award Details page if you select the Require Approval for Payment option on the Employee Referral Program - Employee Referral Program - Employee Referral Programs page or after correcting rejected awards.

Payment Status	Description	Process that Writes Status
Needs Approval (NA)	The employee referral program requires approval of awards and this award has not yet been approved.	 Entered by the Employee Referral Program process if you select the Eligibility and Awards Rules option on the Process Referral Programs page and select the Require Approval for Payment on the Employee Referral Program - Employee Referral Programs page. Entered manually on the Referral Award Details page if a nonapprover corrects rejected awards.
Cancelled (CN)	Plan administrator cancels an award.	Entered manually on the Referral Award Details page.
Sent to Payroll (SP)	Awards have been published to Payroll for North America.	Entered by the Employee Referral Program process if you select Interface to Payroll for NA (interface to Payroll for North America) on the Process Referral Programs page.
Taken by Payroll (TP)	Payroll confirms receipt of award.	Entered by the Employee Referral Program process if you select Interface to Payroll for NA on the Process Referral Programs page.
Paid (PD)	Payroll has paid award.	Entered by the Employee Referral Program process if you select Interface to Payroll for NA on the Process Referral Programs page.
Rejected by Payroll (RP)	Payroll rejects award payment. This is typically due to erroneous data.	Entered by the Employee Referral Program process if you select Interface to Payroll for NA on the Process Referral Programs page.
Reversed by Payroll (RV)	Payroll reverses award payment. This is typically due to an employee being incorrectly paid.	Entered by the Employee Referral Program process if you select Interface to Payroll for NA on the Process Referral Programs page.

Page Used to Process Eligibility and Awards

Page Name	Definition Name	Navigation	Usage
Process Referral Programs	HRS_ERP_RUN	Recruiting, Employee Referrals, Process Referral Programs, Process Referral Programs	Process eligibility and awards and submit awards to Payroll for North America.

Processing Eligibility and Awards

Access the Process Referral Programs page (Recruiting, Employee Referrals, Process Referral Programs, Process Referral Programs).

Process I	Ref	erral Programs			
Run Control ID:	PS		Report Manager	Process Monitor	Run
Eligibility ar					
Interface to	Pay	OII FOR NA			
Employee Refe	erral I	Programs to Process	Customize Find 🗖	First 🚺 1 of 1 🕨	Last
Referral Program	n ID	Description			
	0			+.	

Process Referral Programs page

Click Run to run this request. PeopleSoft Process Scheduler runs the Employee Referral Program process at user-defined intervals.

Eligibility and Awards Rules	Select to process eligibility and create awards.
Interface to Payroll for NA (interface to Payroll for North America)	Select to process award payments through Payroll for North America.
Referral Program ID	Select the employee referral programs that you want to process. You can add rows as necessary. If you do not select an employee referral program, the process runs for all employee referral programs.

Reviewing and Overriding Referral Awards

This section provides an overview of referral overrides, lists common elements, and discusses how to:

- View referral summary information.
- View and override employee eligibility.
- View awards.
- Override award details.
- View eligibility by application.
- View and override duplicate referrals.
- Review eligibility overrides.
- Review award overrides.

Understanding Referral Overrides

To manage referral overrides:

- View and override eligibility and award information for referrals by using the Administer Referrals component.
- View duplicate referrals and adjust award amounts among eligible employees by using the Review Duplicate Referrals page.
- View an audit list of manual overrides, including who made the change, when the change was made, and details of the change, by using the Review Override Audit (HRS_OVERRIDE_AUDIT) component.

Pages Used to View and Override Referral Awards

Page Name	Definition Name	Navigation	Usage
Referral Administration	HRS_REF_ADMN_MAIN	Recruiting, Employee Referrals, Administer Referrals, Referral Administration	View referral summary information.
Administer Referrals - Eligibility	HRS_REF_ADMN_ELIG	Recruiting, Employee Referrals, Administer Referrals, Eligibility	View and override employee eligibility.
Administer Referrals - Awards	HRS_REF_ADMN_AWD	Recruiting, Employee Referrals, Administer Referrals, Awards	View awards.

Page Name	Definition Name	Navigation	Usage
Referral Award Details	HRS_EE_REF_AWD_OVR	 Click the Details link on the Administer Referrals - Awards page. Click the Details link on the Approve Employee Awards page. This page is display- only. Click the Edit link on the Rejected Awards page. 	Override award details. Note. When you access the Referral Award Details page from the Approve Employee Awards page, the Referral Award Details page is display-only.
Application Summary	HRS_REF_ADMN_APPDT	Recruiting, Employee Referrals, Administer Referrals, Application Summary	View eligibility by application.
Review Duplicate Referrals	HRS_DUP_REF	Recruiting, Employee Referrals, Track Duplicate Referrals, Review Duplicate Referrals	View and override duplicate referrals.
Eligibility Overrides	HRS_AUDIT_OVR_ELIG	Recruiting, Employee Referrals, Review Override Audit, Eligibility Overrides	View the audit details of manual overrides to eligibility data. You can select overrides by applicant, by employee, or by the administrator who overrode the audited field. Only referrals that contain audit information are available in the search.
Award Overrides	HRS_AUDIT_OVR_AWD	Recruiting, Employee Referrals, Review Override Audit, Award Overrides	View the audit details of manual overrides to award data.

Viewing Referral Summary Information

Access the Referral Administration page (Recruiting, Employee Referrals, Administer Referrals, Referral Administration).

Referral Adminis	stration <u>E</u> ligibility	Awards Application Summary
Employee Infor	mation	
Empl ID:	KUTZ502	Joseph Randall
Department:	10500	Benefits
Applicant Infor	mation	
Applicant ID:	147	Eric English
Empl ID:	KUZ112	Hire Date: 12/09/2000
Job Opening ID	: <u>200012</u>	Auditor-General
Job Requisition	ns Referred	Customize Find View All 🎴 🛗 First 🚺 1 of 1 🖸 Last
Job Opening	Posting Title	Department Requisition Status Status Date
200012	Auditor-General	13000 110 Filled/Closed 12/09/2000

Referral Administration page

Job Requisitions Referred

Use this group box to view information for all job openings to which the employee has referred the applicant.

Viewing and Overriding Employee Eligibility

Access the Administer Referrals - Eligibility page (Recruiting, Employee Referrals, Administer Referrals, Eligibility).

Referral Administrat	tion Eligibility	<u>A</u> wards A	pplication Summary	
Employee Informat	ion			
Empl ID:	KUTZ502	Joseph Rand	all	
Department:	10500	Benefits		
Applicant Informati	ion			
Applicant ID:	<u>147</u>	Eric English		
Empl ID:	KUZ112	Hire Date:	12/09/2000	
Job Opening ID:	<u>200012</u>	Auditor-Gene	ral	
Employee Eligibility	1			
Referral Program I	D: KU_ERP	_01	ERP for US-bas	sed jobs
*Status:	Ineligibl	e 💌	🗌 Reprocess Elig	jibility/Awards
Creation Date:	06/19/20	02	Profile Seq:	1
Event Type:	General	Eligibility Criteria	Event Date:	02/15/2005
Comments:	Applican	t was hired before	being referred.	

Administer Referrals - Eligibility page

Employee Eligibility

Use this group box to view eligibility data for each eligibility rule that is defined in the Employee Eligibility Rules group box on the Employee Referral Program - Rules page.

If the applicant has not been hired, the system issues the following message: "Eligibility has not yet been determined" in place of the fields in the Employee Eligibility group box.

Status	Displays the current employee eligibility status. Values are <i>Eligible</i> and <i>Ineligible</i> . You can override the <i>Eligible</i> status only if the award has not been submitted for payment. If you manually change the status from <i>Ineligible</i> to <i>Eligible</i> , the system does not reprocess eligibility rules that are evaluated as of the referral date or hire date.
Reprocess Eligibility/Awards	Select to rerun all eligibility and awards processing the next time that you run the Employee Referral Program process. This option is unavailable if any of the awards for the referral have been sent to the payroll system.
Creation Date	Displays the date that the eligibility status was originally determined by the system.

Event Type	Displays the category of the rule or criteria that causes the ineligibility status. This field appears on the page only when the eligibility status is Ineligible. Values are:			
	• Award Eligibility Rule: Eligibility rule associated with the award date in the When to Apply field on the Employee Referral Program - Rules page.			
	• <i>General Eligibility Criteria:</i> Any of the criteria defined on the Employee Referral Program - Criteria page.			
	• <i>Hire Eligibility Rule:</i> Eligibility rule associated with the applicant's hire date in the When to Apply field on the Employee Referral Program - Rules page.			
	• Manual Override: Manual change on this page.			
	• <i>Referral Eligibility Rule:</i> Eligibility rule associated with the referral date in the When to Apply field on the Employee Referral Program - Rules page.			
Event Date	Displays the date that the eligibility status was last changed. This field appears on the page only when the eligibility status is Ineligible.			
Comments	Displays a comment that explains the reason for the eligibility status. You can manually enter a comment that supersedes the system-generated comment.			
	If you manually change the eligibility status, the system enters this comment: "Manual override by administrator." You can view details of a manual override on the Eligibility Overrides page.			

Viewing Awards

Access the Administer Referrals - Awards page (Recruiting, Employee Referrals, Administer Referrals, Awards).

Referral Administration Eligibility Awards Application Summary						
Employee Information						
Empl ID: KUTZ50		TZ502	Joseph Rar	ndall		
Department: 10500		500	Benefits			
Applicant Information						
Applicant ID:	<u>147</u>	1	Eric English	ı		
Empl ID:	KUZ	<u>Z112</u>	Hire Date:	12/09/2000		
Job Opening ID:		012	Auditor-Gen	eral		
Awards					7	
Awarus				Customize Find	First 🖬	1 of 1 🚨 Last
Award Date	Payment Status		Earnings Code	Referral Program ID	Award Value	Details
06/09/2001	Needs Approval		RFA	KU_ERP_01	1500.00	<u>Details</u>

Administer Referrals - Awards page

Award Date	Displays the award date. The system calculates this date according to the duration in the award schedule.
Payment Status	Displays the payment status.
	See <u>Chapter 24, "Managing Employee Referral Programs," Understanding</u> Payment Statuses, page 721.
Award Value	Displays the award value. The system determines this value based on the award schedule of the award category.
Details	Click to access the Referral Award Details page, where you can override award details.

Overriding Award Details

Access the Referral Award Details page (click the Details link on the Administer Referrals - Awards page or on the Approve Employee Awards page).

Referral Award Details		
Empl ID: *Award Date:	Joseph Randall KUTZ502	
Description:	Finance Dept Ref Award	
*Earnings Code:	RFA 🧠 Referral Award	
Payment Status:	Needs Approval	
*Payment Status Override:	Needs Approval	
Status Date/Time:	06/19/2002 10:59:30AM	
*Dept Charged:	13000 Kinance and Administration	
*Award Value:	1,500.00	
Actual Amount Paid:		
*Currency Code:	US Dollar	
	□ Separate Check ☑ Gross-Up	
Referral Program ID:	KU_ERP_01 ERP for US-based jobs	
	Require Approval for Payment	
OK Cancel		

Referral Award Details page

Much of the data on this page reflects the rules and criteria that are set up for the employee referral program. You can override the value in any editable field.

Award Date	Displays the award date. The system calculates this date according to the award schedule rules.
Description	Displays the description that you specified for the award on the Award Schedule page.

Payment Status Override	Select a payment status. Use this field to manually approve an award that has <i>Needs Approval</i> status. You can do this only if the eligibility status is <i>Eligible</i> .	
	The employee referral program administrator can manually change the payment status to or from <i>Needs Approval</i> , <i>Approved</i> , or <i>Cancelled</i> .	
	You cannot manually override the status of an award that is submitted to be paid, unless Payroll for North America has rejected it.	
	If an award has been rejected by Payroll for North America, the employee referral program administrator can change a <i>Rejected by Payroll</i> or <i>Reversed by Payroll</i> status to one of these values:	
	• <i>Cancelled:</i> You accept the reason for the rejection and do not intend to correct it.	
	• <i>Needs approval:</i> You corrected the reason for the rejection and now the award is ready to be approved again.	
	• <i>Approved:</i> You corrected the reason for the rejection and now the award is ready to be submitted when the process runs again for the employee referral program.	
Dept Charged (department charged)	Displays the department (of the job opening) into which the applicant was hired.	
Award Value	Displays the amount of the award as defined in the award schedule.	
Actual Amount Paid	Displays the value that is entered when the award is paid through Payroll for North America.	
Currency Code	Displays the currency in which the award is paid to the employee.	
Separate Check	Select to override the default that you set up on the Employee Referral Program - Employee Referral Programs page.	
Gross-Up	Select to override the default that you set up on the Award Schedule page. If you select this option and use Payroll for North America, the award is paid by a separate check.	
Require Approval for Payment	Set the value for this field on the Employee Referral Program - Employee Referral Programs page. You cannot change it here.	
Rejected Reason	Displays the reason that Payroll for North America rejected the award. This field only appears when the award is rejected by the payroll system.	
Last Manual Override	Displays the date of the last manual override. You can view details of the override on the Award Overrides page. This field only appears when an administrator manually changes an award payment-related field.	

Viewing Eligibility by Application

Access the Application Summary page (Recruiting, Employee Referrals, Administer Referrals, Application Summary).

Referral Administration Eligibility Awards Application Summary					
Employee Information					
Empl ID:	KUTZ502	Joseph Randall			
Department:	10500	Benefits			
Applicant Information					
Applicant ID:	<u>147</u>	Eric English			
Empl ID:	KUZ112	Hire Date: 12/09/2000			
Job Opening ID:	200012	Auditor-General			
Eligibility by Applic	ation	Find View All First 🚺 1 of 1 🗈 Last			
Referral Program ID: KU_ERP_0		_01 ERP for US-based jobs			
Status:	Ineligible	Profile Seq: 1			
Event Type:	General E	Eligibility Criteria Event Date: 02/15/2005			
Comments: Applicant was hired before being referred.					

Application Summary page

This page shows all the dates on which the employee referred the applicant and the employee's eligibility status for each referral. Remember that eligibility for award payment is determined by the job opening into which the applicant is hired.

Comments

Displays the reason if the eligibility status is Ineligible.

Viewing and Overriding Duplicate Referrals

Access the Review Duplicate Referrals page (Recruiting, Employee Referrals, Track Duplicate Referrals, Review Duplicate Referrals).

Employees appear on this page in the order in which they referred the applicant. The first employee that appears is the first employee who referred the applicant, and so on.

The total award for all employees can be more than the original award if you selected Allow Dups to Exceed Original (allow duplicates to exceed original) on the Employee Referral Program - Criteria page when you set up the employee referral program.

Original Award Total Displays the total value of all awards in the original award schedule.

Current Award Total	Displays the total of all awards entered on the page for all the referring employees.
Refresh	Click to refresh the award total amounts in the Current Award Total and Award Total fields.

Employee-Specific Page Elements

Award Total	Displays the total value of all awards for the employee.
Referral Time Stamp	Displays the date and time that the employee submitted the referral.
Award Value	Adjust the award amount for each employee.
Ineligible for referral award	Select this check box to prevent the employee from receiving referral awards. This option is not available for the first employee who submitted the referral.

Reviewing Eligibility Overrides

Access the Eligibility Overrides page (Recruiting, Employee Referrals, Review Override Audit, Eligibility Overrides).

Eligibility Overrides Award Overrides					
Applican	t ID:	147 English,Eric			
Employe	e ID: KUTZ502	Joseph Randal	I		
					erral Information
Overrid	e Audits	<u>Custor</u>	mize Find View All 🛛	Pirst	💶 1 of 1 🖸 Last
User ID	Name	Date and Time Stamp	Field Changed	Old Value	New Value
PS	Betty Locherty	06/18/2009 9:57:12.685874AM	Status	Ineligible	Eligible

Eligibility Overrides page

View Referral Information	Click to access the Referral Administration page, where you can review detailed information about the referral.
User ID,Name, and Date and Time Stamp	These fields display information about who overrode the eligibility value for this award and when the override occurred.
Field Changed, Old Value, and New Value	These fields display information about the data that changed when the override occurred.

Reviewing Award Overrides

Access the Award Overrides page (Recruiting, Employee Referrals, Review Override Audit, Award Overrides).

Eligibility Overrides Award Overrides					
Applicar Employe		47 English,Eric Joseph Randal	I		
View Referral Information Employee Referral Award Customize Find View All I First I of 1 Last Overrides First I of 1 Last					
User ID	Name	Audit Date/Time	Field Changed	Old Value	New Value
PS	Betty Locherty	06/18/2009 9:57:12.715101AM	Payment Status	Needs Appr	Approved

Award Overrides page

This page is identical to the Eligibility Overrides page, but the data refers to award overrides rather than eligibility overrides.

Approving and Paying Referral Awards

This section provides overviews of award approvals and paying awards, and discusses how to.

- Approve referral awards.
- Submit awards.
- View rejected awards.
- Edit rejected awards.

Understanding Award Approvals

When you set up the employee referral program, define whether awards require approval before payment. If approval is required, the system assigns the awards the Needs Approval payment status when you run the Employee Referral Program process. You must manually approve the awards.

To manually approve awards, you can:

• Use the Approve Employee Awards page to approve all awards or selected awards in the employee referral program when the payment status is Needs Approval.

• Use the Rejected Awards page to correct and approve awards when the payment status is Rejected by Payroll.

See Chapter 24, "Managing Employee Referral Programs," Viewing Rejected Awards, page 740.

• Use the Referral Award Details page in the Administer Referrals component to override award details and approve the award when the payment status is other than Needs Approval or Rejected by Payroll.

See Chapter 24, "Managing Employee Referral Programs," Overriding Award Details, page 729.

Understanding Paying Awards

The interface between employee referral programs and payroll processing depends upon the payroll system that you use to pay the referring employee. If you pay employees through Payroll for North America, use the Employee Referral Program process to send the monetary and non-stock, non-monetary awards directly to Payroll for North America using PeopleSoft Integration Broker. If you pay employees through a payroll system other than Payroll for North America, you must create an interface to that payroll system.

Access the Process Referral Programs page and select the Interface to Payroll for NA option to run the Employee Referral Program process. The same process is used to determine eligibility and create awards.

The Employee Referral Program process:

• Submits awards for payment.

The process sends approved awards to payroll that have been scheduled with an award date prior to or equal to the current date. The process does not submit awards that have already been submitted or awards that are future-dated.

- Updates the payment status for each submitted award to Sent to Payroll.
- Retrieves paid award information from Payroll for North America.

After payroll pays an award and publishes the results, the subscription process retrieves payment information and updates these records:

- Employee referral program data records (HRS_EE_REF_AWD).
- Job opening expense data (HRS_JO_EXP).

The job opening expense amount is the amount that is paid by payroll, including taxes that have been grossed up. You can view the expense information on the Job Opening - Activity & Attachments and Add Expenses pages. The expense code value is *Referral Fee*.

The payroll system:

- Calculates gross-up amounts and taxes.
- Pays the cash awards.
- Posts the amounts to the appropriate general ledger account.

If the currency code of the award does not match the currency code of the employee's pay group, the award is rejected and the employee referral program administrator must use the Rejected Awards page to override the values.

If the converted amount of the award is greater than 8.2 digits, the award is rejected and the employee referral program administrator must use the Rejected Awards page to split the award into two payments.

Integration with Payroll for North America Process Flow

This table outlines the award payout integration between employee referral programs and Payroll for North America:

Integration Step	Description	
Employee referral program publishes a payment request for approved awards to payroll.	Publishes the award amount in the currency of the award category.	
	Sets the award's payment status to Sent to Payroll.	
Payroll subscribes to the payment request, which automatically runs a PeopleSoft Application Engine	Subscription inserts the awards into a subscribing staging table.	
process to validate or reject the award data and publishes an acknowledgement of acceptance or rejection.	Validation checks for error conditions that require correction prior to loading to paysheet.	
	If award data is valid, the system inserts the awards into the application table and publishes an acknowledgement that sets the award's payment status to Taken by Payroll.	
	If errors are detected, the system publishes an acknowledgment that sets the award's payment status to Rejected by Payroll and supplies a reason code.	
Employee referral program subscribes to the acknowledgement of rejected awards or awards with errors.	Employee referral program administrator uses the Rejected Awards page to view the reason for rejection and the Referral Award Details page to correct the award data.	
Payroll processes validated awards and issues checks.	Payroll creates paysheets, calculates gross-up amounts and taxes, confirms pay, issues checks, and posts amounts to the general ledger.	
Payroll runs a PeopleSoft Application Engine process to send a notification of payment.	This process runs after payments are calculated and confirmed.	
Employee referral program subscribes to the notification of payment.	The subscription updates the award's payment status to Paid or Reversed by Payroll and updates the status date and time, actual amount paid, paycheck status, paycheck number, and check date.	

Integration Points

This table describes the service operation that are used to transfer awards and payout data between Recruiting Solutions and Payroll for North America:

Integration Point	Service Operation	Definition
ERECRUIT REQUEST FOR PAYMENT	PAYMENT_ERECRUIT_REQUE ST	Recruiting Solutions publishes award data to payroll and payroll subscribes to the award data.
ACKNOWLEDGMENT/VERIFIC ATION OF ERECRUIT PAYMENT	PAYMENT_ERECRUIT_ACKNO WLEDGE	Payroll validates the requested awards and publishes the results of validation. Recruiting Solutions subscribes to the acknowledgement.
PAYROLL ISSUED ERECRUIT PAYMENT	PAYMENT_ERECRUIT_ISSUED	Payroll publishes notification of payment and Recruiting Solutions subscribes to the notification.

See Also

PeopleTools: Integration Broker PeopleBook

Pages Used to Approve and Pay Referral Awards

Page Name	Definition Name	Navigation	Usage
Approve Employee Awards	HRS_MASS_APRV	Recruiting, Employee Referrals, Approve Employee Awards, Approve Employee Awards	Approve referral awards that have the status of Needs Approval.
Referral Award Details	HRS_EE_REF_AWD_OVR	 Click the Details link on the Administer Referrals - Awards page. Click the Details link on the Approve Employee Awards page. This page is display- only. Click the Edit link on the Rejected Awards page. 	Override award details. Note. When you access the Referral Award Details page from the Approve Employee Awards page, the Referral Award Details page is display-only.
Process Referral Programs	HRS_ERP_RUN	Recruiting, Employee Referrals, Process Referral Programs, Employee Referral Programs	Submit awards to Payroll for North America and process eligibility and awards.

Page Name	Definition Name	Navigation	Usage
Rejected Awards	HRS_REJECTED_AWDS	Recruiting, Employee Referrals, Review Rejected Awards, Rejected Awards	View rejected awards.
Referral Award Details	HRS_EE_REF_AWD_OVR	 Click the Details link on the Administer Referrals - Awards page. Click the Details link on the Approve Employee Awards page. This page is display- only. Click the Edit link on the Rejected Awards page. 	Override award details. Note. When you access the Referral Award Details page from the Approve Employee Awards page, the Referral Award Details page is display-only.

Approving Referral Awards

Access the Approve Employee Awards page (Recruiting, Employee Referrals, Approve Employee Awards, Approve Employee Awards).

Approve Employee Awards						
Description: ERP for US-based jobs Referral Program ID: KU_ERP_01						
Awards	to Approve		<u>Custor</u>	nize Find View /	🖣 🖓 🛗 🛛 First 🗹 1-	7 of 11 🕨 <u>Last</u>
Select	Award Date	Empl ID	Name	Award Value	Description	Details
	06/14/2001	KUTZ500	Joan Foster	1,500.00	Finance Dept Ref Award	<u>Details</u>
	06/11/2001	KUTZ501	Alec Billings	1,500.00	Finance Dept Ref Award	<u>Details</u>
	06/11/2001	KUTZ501	Alec Billings	500.00	Cash	<u>Details</u>
	06/10/2001	KUTZ501	Alec Billings	4,000.00	HR Director Hot Job Award	<u>Details</u>
	05/12/2002	KUTZ501	Alec Billings	2,000.00	HR Director Hot Job Award	<u>Details</u>
	06/13/2001	KUTZ504	Maryellen McBride	750.00	Fine Cheese Basket	<u>Details</u>
	06/10/2001	KUTZ505	Ione Crane	129.00	Fancy Fruit Basket	<u>Details</u>
Select All Deselect All Approve						

Approve Employee Awards page

All awards that have the Needs Approval payment status appear on this page.

Select	Select the referral awards that you want to approve.			
Details	Click to access the Referral Award Details page, where you can view referral award details.			
Select All	Click to select all referral awards in the list, including those outside the view area.			
Approve	Click to approve the selected referral awards. After awards are approved, they do not appear on this page again.			

Submitting Awards

Access the Process Referral Programs page (Recruiting, Employee Referrals, Process Referral Programs, Employee Referral Programs).

See Chapter 24, "Managing Employee Referral Programs," Processing Eligibility and Awards, page 723.

Viewing Rejected Awards

Access the Rejected Awards page (Recruiting, Employee Referrals, Review Rejected Awards, Rejected Awards).

Rejected Reason Displays the reason that Payroll for North America rejected the award. Use this to determine which data to correct. Values are:

- Amount Exceeds Payroll Maximum
- Expenses Sheet in Error
- Invalid Currency Code
- Invalid Earning Code
- *Invalid Employee ID & Record #* (invalid employee ID and record number)
- Problem in loading to file
- Reject All Requested by User
- Transaction Already Exists

Edit

Click to access the Referral Award Details page, where you can correct the error that caused rejection.

Editing Rejected Awards

Access the Referral Award Details page (click the Details link on the Administer Referrals - Awards page or on the Approve Employee Awards page).

Note. You can also override or reprocess eligibility for a rejected award on the Administer Referrals - Eligibility page.

See Also

Chapter 24, "Managing Employee Referral Programs," Overriding Award Details, page 729

Chapter 24, "Managing Employee Referral Programs," Viewing and Overriding Employee Eligibility, page 726

Managing Hot Jobs

This section provides an overview of hot jobs and discusses how to:

- Name and describe hot job categories.
- Create SQL statements to define job opening selection criteria.
- Remove selected job openings from the hot job category.
- Set up award schedules.

Understanding Hot Jobs

Hot jobs are jobs with special award schedules that override regular employee referral program awards. You set up hot job categories, add job openings to the categories, and create an award schedule for each category.

Hot job categories are like regular award categories, but you associate hot job categories directly with job openings rather than with employee referral programs.

Hot Job Identification

To add job openings to a hot job category, you create one or more SQL queries to selects job openings that meet your criteria. When you run a query, the system adds the job openings that meet the criteria to a list that you can review and modify.

Hot jobs are not effective-dated. After job openings are marked as hot jobs, they remain hot jobs until you remove them from the list. Similarly, newly created job openings that meet the criteria to be a hot job are not automatically marked as hot jobs. You must run the selection process before adding or removing any job openings from the hot job list.

The Job Opening page identifies hot jobs by displaying a flame icon next to the job opening ID.

Certain reports also include information to identify hot jobs, including HRS003 (Job Opening Status Listing), HRS005 (Candidate Listing), and HRS006 (Job Opening Cost Analysis).

Hot Job Eligibility and Award Schedules

The hot job award schedule overrides the award schedule that is associated with the job opening through an employee referral program. However, hot job awards are paid only if the referral satisfies the employee eligibility criteria of the employee referral program—that is, they do not override the referral program's employee eligibility criteria.

For example, suppose that an employee referral program pays awards six months after an applicant is hired, while the hot job award is paid three months after the hire date. In this situation, eligibility is checked at the three-month point but not at the six-month point. The employee referral program *eligibility rules* apply, but the hot job *awards schedule* overrides the employee referral program award schedule once the eligibility criteria are met.

Note. There is no safeguard in the system against creating hot job awards of less value than in the employee referral program award category. Therefore, you must use caution when setting up hot job awards.

Hot Jobs Administration

You administer hot jobs using the Hot Job Administration (HRS_RULE_HOTJOB) component. Hot job administration includes these steps:

- 1. Name and describe a hot job category on the Hot Jobs page.
- 2. Create SQL statements that define job opening selection criteria on the Hot Job Administration Selection page.
- 3. Click the Select Hot Jobs button on the Hot Job Administration Selection page to create a list of job openings that meet your SQL selection criteria.
- 4. Review the list of job openings, and remove any that you don't want to include, on the Job Openings page.
- 5. Set up the amounts and timing of awards for the hot job category on the Award Schedule page.
- 6. View the history of a requisition's hot job status on the Hot Job History page.

Note. The Hot Jobs component also includes the same Awards Schedule page that appears in the Employee Referral Program component.

Page Name	Definition Name	Navigation	Usage
Hot Jobs	HRS_RULE_DEF	Recruiting, Employee Referrals, Hot Jobs, Hot Jobs	Name and describe the hot job category.
Hot Jobs Administration - Selection	HRS_RULE_SQL	Recruiting, Employee Referrals, Hot Jobs, Selection	Create SQL statements to define job opening selection criteria.
View SQL	HRS_VW_SQL	 Click the View SQL link on the Employee Eligibility Rules - Rule SQL page. Click the View SQL link on the Award Category Rules - Rule SQL page. Click the View SQL link on the Hot Job Administration - Selection page. 	View a SQL statement that the system generates from information that you enter on the Hot Job Administration - Selection page.
Job Openings	HRS_RULE_HJ	Recruiting, Employee Referrals, Hot Jobs, Job Openings	Remove selected job openings from the hot job category and associate employee referral programs with job openings.
Award Schedule	HRS_RULE_AWD_SCH	Recruiting, Employee Referrals, Hot Jobs, Award Schedule	Set up award schedules.

Pages Used to Manage Hot Jobs

Page Name	Definition Name	Navigation	Usage
Hot Job History	ER_HOTJOB_HIST	Recruiting, Employee Referrals, Hot Job History, Hot Job History	View the history of a job opening's hot job status.

Naming and Describing Hot Job Categories

Access the Hot Jobs page (Recruiting, Employee Referrals, Hot Jobs, Hot Jobs).

Hot Jobs <u>S</u> election	Job Openings Award Schedule	
Rule ID:	KU0002	
*Description:	Hot Job for HR Director	
*Short Description:	HRDirector	
Long Description:	Hot Job for HR Director - \$4,000	5

Hot Jobs page

Creating SQL Statements to Define Job Opening Selection Criteria

Access the Hot Job Administration - Selection page (Recruiting, Employee Referrals, Hot Jobs, Selection).

	<u>H</u> ot J	obs	Selection Job Open	ings <u>A</u> ward Schedule					
I	Rule	ID:	KU0002	De	escription: H	ot Job for HR Dire	ctor		
	Ho	t Job Se	lection Criteria						
		Open (Record	*Field Name	*Operator	Value	Boolean	Close)	
	1	-	HRS_JO_I	HRS_JOB_OPENIN	Equal To 💌	200003 🔍	•	-	+ -
	Vie	w SQL	Select Hot Jobs						

Hot Job Administration - Selection page

The Selection page is identical to the Employee Eligibility Rules - Rule SQL page that you use to set up employee eligibility rules with the addition of a Select Hot Jobs button.

See <u>Chapter 24</u>, "Managing Employee Referral Programs," Creating SQL Statements for Employee <u>Eligibility Rules</u>, page 704.

Create SQL statements to define job opening selection criteria and then click the Select Hot Jobs button to load qualifying job openings into the Job Openings page.

The system does not list job openings that have already been selected into another hot job category.

If you previously created a list of job openings for this hot job category, the system reapplies the criteria, and any job opening that no longer qualifies does not appear on the list. For example, if *Open* status is a criteria, a job opening that now has *Reopen* status does not appear on the list.

Removing Selected Job Openings from the Hot Job Category

Hot Jobs	Selection	Job Openings Award	d Schedule			
Rule ID:	KU00)02 E	Description:	Hot J	Job for HR Director	
Hot Job	s		<u>Customize</u>	Find \	View All 🗷 🛗 🛛 First 🗹 1 of 1 🖸 Las	st
Select Row	Job Req	Posting Title	Referral Program ID		Description	
	200003	Director-Human Resources	KU_ERP_0	1	ERP for US-based jobs	-
Remove	e Selected	Remove All				

Access the Job Openings page (Recruiting, Employee Referrals, Hot Jobs, Job Openings).

Job Openings page

Hot Jobs

Referral Program ID If you have associated the job opening with an employee referral program, the employee referral program ID appears here. If the job opening is not associated with an employee referral program, select one here. You must associate a job opening with an employee referral program; otherwise, the system cannot determine employee eligibility for awards.

Action ButtonsRemove SelectedClick to remove job openings for which you have selected the Select Row
check box. The system removes the job openings when you save.Remove AllClick to remove all job openings from the list. The system removes the job
openings when you save.

Setting Up Award Schedules

Access the Award Schedule page (Recruiting, Employee Referrals, Hot Jobs, Award Schedule).

See Chapter 24, "Managing Employee Referral Programs," Defining Award Schedules, page 707.

View Hot Job History

Access the Hot Job History page (Recruiting, Employee Referrals, Hot Job History, Hot Job History).

Hot Job His	story		
Job Opening:	900003		
Position:			
Job Details		Customize Find V	/iew All 🗖 🛗 First 🗹 1 of 1 🖸 Last
As of Date	Sequence	Status	Hot Job ID
05/02/2009	0	Active	N20020

Hot Job History

Appendix A

Delivered Workflows for Talent Acquisition Manager

This appendix discusses:

- Delivered workflows for Talent Acquisition Manager.
- Delivered notification templates.

See Also

PeopleTools: Workflow Technology PeopleBook

Delivered Workflows for Talent Acquisition Manager

This section discusses Talent Acquisition Manager workflows. The workflows are listed alphabetically by workflow name.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Approvals"

Chapter 13, "Creating Job Openings," page 231

Chapter 19, "Making Job Offers," page 529

Job Offer Approval

This section discusses the Job Offer Approval workflow.

Description

Event Description	A hiring manager or recruiter submits a job offer.	
Action Description	The system routes the job offer to approvers for approval or denial.	

Notification Method	Email and worklist.

Workflow Objects

Event	Launch, Approve
Participant	Approvers
Email Template	JobOfferApproval
Business Process	EOAW_APPROVALS
Business Activity	EOAW_ROUTE

Job Offer Approved

This section discusses the Job Offer Approved workflow.

Description

Event Description	Final approver approves a job offer.	
Action Description	The system marks the job offer as approved and notifies the requester.	
Notification Method	Email and worklist.	

Workflow Objects

Event	OnApprove
Participant	Requester
Email Template	JobOfferApproved
Business Process	EOAW_APPROVALS
Business Activity	EOAW_ROUTE

Job Offer Deny

This section discusses the Job Offer Deny workflow.

Description

Event Description	An approver denies the job offer.		
Action Description	The system marks the job offer as denied, ending the workflow process. The system notifies the requester.		
Notification Method	Email and worklist.		

Workflow Objects

Event	OnDeny
Participant	Requester
Email Template	JobOfferDeny
Business Process	EOAW_APPROVALS
Business Activity	EOAW_ROUTE

Job Offer Error

This section discusses the Job Offer Error workflow.

Description

Event Description	An approval workflow error occurred in the approval routing. This can occur as a result of the approval process configuration or because of approval rules or criteria violations.
Action Description	The system routes the job offer to the administrator for resolution.
Notification Method	Email and worklist.

Workflow Objects

Event	Error
Participant	Administrator
Email Template	JobOfferError
Business Process	EOAW_APPROVALS

Business Activity	EOAW_ROUTE
-------------------	------------

Job Offer Escalation

This section discusses the Job Offer Escalation workflow.

Description

Event Description	An approver has not responded to a job offer within the allotted time.
Action Description	The system notifies the approver and the approver's supervisor and routes the job offer to the next step.
Notification Method	Email and worklist.

Workflow Objects

Event	Escalate
Participant	Dynamic
Email Template	JobOfferEscalation
Business Process	EOAW_APPROVALS
Business Activity	EOAW_ROUTE

Job Offer Review

This section discusses the Job Offer Review workflow.

Description

Event Description	An approver routes the job offer to reviewers to review.
Action Description	The system notifies reviewers that they must review the job offer.
Notification Method	Email and worklist.

Workflow Objects

Event	Review

Participant	Reviewers
Email Template	JobOfferReview
Business Process	EOAW_APPROVALS
Business Activity	EOAW_ROUTE

Job Offer Termination

This section discusses the Job Offer Termination workflow.

Description

Event Description	A user that has access to the job offer makes a change to a field that might require the job offer to be evaluated again or an administrator overrides the approval process.
Action Description	The system terminates the job offer approval process and notifies the requester.
Notification Method	Email and worklist.

Workflow Objects

Event	Termination
Participant	Requester
Email Template	JobOfferTermination
Business Process	EOAW_APPROVALS
Business Activity	EOAW_ROUTE

See Also

Chapter 19, "Making Job Offers," Understanding Job Offer Approvals, page 546

Job Opening Approval

This section discusses the Job Opening Approval workflow.

Description

Event Description	A hiring manager or recruiter submits a job opening.
Action Description	The system routes the job opening to approvers for approval or denial.
Notification Method	Email and worklist.

Workflow Objects

Event	Approve, Launch
Participant	Approvers
Email Template	JobOpeningApproval
Business Process	EOAW_APPROVALS
Business Activity	EOAW_ROUTE

Job Opening Approved

This section discusses the Job Opening Approved workflow.

Description

Event Description	Final approver approves a job opening.
Action Description	The system marks the job opening as approved and notifies the requester.
Notification Method	Email and worklist.

Workflow Objects

Event	OnApprove
Participant	Requester
Email Template	JobOpeningApproved
Business Process	EOAW_APPROVALS
Business Activity	EOAW_ROUTE

Job Opening Deny

This section discusses the Job Opening Deny workflow.

Description

Event Description	An approver denies the job opening.
Action Description	The system marks the job opening as denied, ending the workflow process. The system notifies the requester.
Notification Method	Email and worklist.

Workflow Objects

Event	OnDeny
Participant	Requester
Email Template	JobOpeningDeny
Business Process	EOAW_APPROVALS
Business Activity	EOAW_ROUTE

Job Opening Error

This section discusses the Job Opening Error workflow.

Description

Event Description	An approval workflow error occurred in the approval routing. This can occur as a result of the approval process configuration or because of approval rules or criteria violations.
Action Description	The system routes the job opening to the administrator for resolution.
Notification Method	Email and worklist.

Workflow Objects

Event	Error
Participant	Administrator

Email Template	JobOpeningError
Business Process	EOAW_APPROVALS
Business Activity	EOAW_ROUTE

Job Opening Escalation

This section discusses the Job Opening Escalation workflow.

Description

Event Description	An approver has not responded to a job opening within the allotted time.
Action Description	The system notifies the approver and the approver's supervisor and routes the job opening to the next step.
Notification Method	Email and worklist.

Workflow Objects

Event	Escalate
Participant	Dynamic
Email Template	JobOpeningEscalation
Business Process	EOAW_APPROVALS
Business Activity	EOAW_ROUTE

Job Opening Review

This section discusses the Job Opening Review workflow.

Description

Event Description	An approver routes the job opening to reviewers to review.
Action Description	The system notifies reviewers that they must review the job opening.
Notification Method	Email and worklist.

Workflow Objects

Event	Review
Participant	Reviewers
Email Template	JobOpeningReview
Business Process	EOAW_APPROVALS
Business Activity	EOAW_ROUTE

Job Opening Termination

This section discusses the Job Opening Termination workflow.

Description

Event Description	A user that has access to the job opening makes a change to a field that might require the job opening to be evaluated again or an administrator overrides the approval process.
Action Description	The system terminates the job opening approval process and notifies the requester.
Notification Method	Email and worklist.

Workflow Objects

Event	Termination
Participant	Requester
Email Template	JobOpeningTermination
Business Process	EOAW_APPROVALS
Business Activity	EOAW_ROUTE

See Also

Chapter 13, "Creating Job Openings," Understanding Job Opening Approvals, page 322

Delivered Notification Templates

This table lists the delivered notification templates for Talent Acquisition Manager.

Template Name	Description
ApplicantStsEffct	Applicant Status Change
AutomatchNotification	Recruiter Job Opening Notify
HRS_APPLICANT_PASSWORD	Applicant Password/User ids
HRS_APP_RTE	Applicants Route Notification
HRS_APP_RTE_NOJOB	Application Route - No Job
HRS_APP_RTE_NORCMNT	Application Route - No Rcmt ID
HRS_ARM_GENERICRESEND	Send Correspondence Resend
HRS_CE_APPL_APPLY_JOB	Submit resume notification
HRS_CE_EML_FRND	Email a Friend
HRS_EMPL_CNFRM_REF	Employee Confirm Referral
HRS_EVAL_ASGN	Evaluator Assigned to Job Open
HRS_EVAL_REMOVE	Remove Evaluator Notification
HRS_FORWARD_APPLICANT	Forward Applicant
HRS_HROI_DRAFT	Notify on Draft Status
HRS_HROI_REJECT	Notify on Reject
HRS_HROI_SUCCESS	Notify on Success
HRS_HROI_UNRESOLVED	Notification sent on Unresolved
HRS_ICALENDAR_NOTIFY	iCalendar Notification
HRS_INTVWSCHED_APPL	Notify Interview Applicant
HRS_INTVWSCHED_APPL_NOJO	NotifyInterviewApplicant
HRS_INTVWSCHED_NOJO_CANCEL	NotifyCancelledIntTeamnojo

Template Name	Description	
HRS_INTVWSCHED_TEAM_CANCEL	NotifyCancelledInterviewTeam	
HRS_INTVW_APP_CANCEL	Notify Interview Cancellation	
HRS_INTVW_CANCEL_APP_NOJO	Notify Interview Cancellation	
HRS_INTVW_EVAL_RMNDR	Interview Evaluation Reminder	
HRS_INTVW_SCHED_TEAM	Notify Interview Team	
HRS_INTVW_SCHED_TEAM_NOJO	Notify Interview Team	
HRS_INT_CUSTOMIZE_MSG	Customize Message Request	
HRS_INT_EVAL_DELETE_RETURN	Interview Evaluation Return	
HRS_INT_EVAL_SUBMIT	Interview Evaluation Submit	
HRS_INT_GEN_MTG_RQST	GeneralMeetingRequest	
HRS_INVITE_APPLICATION	Invite Employee to Apply	
HRS_LINK_APPJO HRS	Link Applicant to JO	
HRS_NOTIFY_RECRUITERS	Send email to recruiters	
HRS_OFFER_DOC_ATCH	Offer Doc Attachment Notice	
HRS_OFFER_NOTICE	Online Job Offer Notice	
HRS_OFFER_RESPONSE	Online Job Offer Response	
HRS_QSTN_REQUEST	Questionnaire Request	
HRS_SEND_CRSP_GEN_EML	Generic Correspondence	
HRS_SEND_EVAL	Send Email to Evaluators	
HRS_UNEVAL_ANS	Unevaluated Answers	
HRS_UPDATE_REFERENCES	Applicant References	
HR_ERR_NOTIF	Hire Error Notification Template	
HR_HIRE_NOTIF	Hire Notification template	
JobAgentNotification	Applicant Job Agent Notify	
JobOfferApproval	Job Offer Approval Routing	

Template Name	Description
JobOfferApproved	Job Offer Has Been Approved
JobOfferDeny	Job Offer Has Been Denied
JobOfferError	Job Offer Error
JobOfferEscalation	Job Offer Escalation
JobOfferReview	Job Offer Review
JobOfferTermination	Job Offer Termination
JobOpeningApproval	Job Opening Approval Routing
JobOpeningApproved	Job Opening Has Been Approved
JobOpeningDeny	Job Opening Has Been Denied
JobOpeningError	Job Opening Error
JobOpeningEscalation	Job Opening Escalation
JobOpeningReview	Job Opening Review
JobOpeningStsEffct	Job Opening Status Change
JobOpeningTermination	Job Opening Termination
OtherStsEffct	Status Change

Appendix B

Delivered Permission Lists and Roles for Talent Acquisition Manager

This section provides an overview of how security is used in PeopleSoft Talent Acquisition Manager and list the delivered permission lists and roles.

Delivered Permission Lists and Roles

Permission List	Roles	Description
HCCPRS0000	Recruitment User	Recruiting Solutions Hidden
HCCPRS1000	Recruitment Administrator	Set Up Recruiting Solutions
HCCPRS1010	RS Technical Administrator Recruitment Administrator	Set Up RS Integrations
HCCPRS1020	RS Approval Administrator Recruitment Administrator	Set Up Approvals
HCCPRS1030	Hiring Manager Recruiter Recruitment Administrator	Candidate Management
HCCPRS1040	Hiring Manager Recruiter Recruitment Administrator	Job Opening Management
HCCPRS1050	Applicant	RS Applicant Self-Service
HCCPRS1060	Hiring Manager Recruiter Recruitment Administrator	RS Applicant List
HCCPRS1070	Federal Recruiter	(USF) Recruiting Solutions

This following table list Talent Acquisition Manager delivered permission lists and roles:

Permission List	Roles	Description	
HCCPRS1090	Hiring Manager Recruiter Recruitment Administrator	RS Reports	
HCCPRS1100	External Applicant	External Applicant	
HCCPRS1110	Recruitment Administrator	Recruitment Referrals	
HCCPRS1120	Employee	Employee Recruitment	
HCCPRS1130	Hiring Manager Recruiter Recruitment Administrator	Recruiting Solutions Pagelets	
HCCPRS1140	Recruitment Administrator	Recruiting Teams	
HCCPRS1150	Recruiter Recruitment Administrator	Resume Management	
HCCPRS1160	RS Technical Administrator Recruitment Administrator	RS Technical Utilities	
HCCPRS1170	Hiring Manager Recruiter Recruitment Administrator	Interviews	
HCCPRS1175	Evaluator for Open Ended Quest	Evaluators for Open Ended Questions	
HCCPRS1180	Recruiter Recruitment Administrator	Manage Interviews	
HCCPRS1190	Recruitment Administrator	RS Salary Package Model	
HCCPRS1200	Recruiter Recruitment Administrator	RS Saved Searches	
HCCPRS1210	Recruitment Administrator	Checklists	
HCCPRS1220	Hiring Manager Recruiter Recruitment Administrator	RS Prepare for Hire	

Permission List	Roles	Description
HCCPRS1230	Hiring Manager Recruiter Recruitment Administrator	RS Contracts
HCCPRS1240	Hiring Manager Recruiter Recruitment Administrator	RS Send Correspondence
HCCPRS1250	Recruiter Recruitment Administrator	RS Candidate Data Full Access
HCCPRS1260	Hiring Manager	RS Candidate Data Restricted
HCCPRS1270	Recruitment Administrator	JO from Position Creation
HCCPRS1280	Recruitment Administrator	Manage Duplicate Applicants
HCSPRS9020	Recruitment User	RS Standard Message Channels
HCSPRS9030	Recruitment User	RS Web Libraries
HCSPRS9040	Recruitment User	RS Standard CIs

Appendix C

PeopleSoft Talent Acquisition Manager Reports

PeopleSoft Talent Acquisition Manager supplies a group of standard reports to help you manage the recruiting process.

To offer our customers more robust and complete reporting solutions, some Crystal reports are also available in Oracle Business Intelligence Publisher (BI Publisher) format.

BI Publisher provides a standalone Java-based reporting technology that streamlines report and form generation. BI Publisher for PeopleSoft uses select features from BI Publisher that have been integrated into PeopleTools, providing native BI Publisher technology for PeopleSoft Query and Connected Query, as well as any PeopleSoft application.

BI Publisher for PeopleSoft separates the data extraction process from the report layout. It provides the ability to design and create report layout templates with the more common desktop applications of Microsoft Word and Adobe Acrobat, and renders XML data based on those templates. With a single template, you can generate reports in many formats (PDF, RTF, Excel, HTML, and so on) and in many languages.

This appendix provides summary tables of Talent Acquisition Manager reports.

Note. For samples of these reports, see the Portable Document Format (PDF) files that are published with your online documentation.

See Also

PeopleSoft HR 9.1 PeopleBook: Meet Regulatory Requirements, "(USA) Meeting Regulatory Requirements for the United States"

PeopleTools: Process Scheduler PeopleBook

Talent Acquisition Manager Reports: A to Z

This table lists Talent Acquisition Manager reports by report ID. If you need more information about a report, refer to the report details at the end of this appendix.

Report ID and Report Name	Description	Navigation	Run Control Page
HRS001 Adverse Impact Analysis (USA)	Analyzes information on recruitment and hiring practices. (SQR) Note. This report does not support languages other than the base language.	Recruiting, Reports, Adverse Impact (USA), Adverse Impact Analysis (USA)	RUN_CNTL_REG_INTRO
HRS001UK Adverse Impact (UK)	Lists job offers and applications by ethnic groups and gender. (SQR)	Recruiting, Reports, Adverse Impact (UK), Adverse Impact (UK)	RUNCTL_FROMTHRU
HRS002 Job Group Movement Analysis	Provides racial and gender demographic data regarding your hiring process. (SQR) This report does not support languages other than the Base Language Note. The Job Group Movement Analysis report includes only applicants for whom name, gender, and ethnicity data is available. Additionally, for sections other than promotions and terminations, the report considers only applicants who have had results applied from a standard screening process (not prescreening) and for whom the Eligible to Work in the US check box is selected on the application.	Recruiting, Reports, Job Group Movement Analysis, Job Group Movement Analysis	RUN_CNTL_REG_INTRO
HRS003 Job Opening Status Listing	For each job opening, the report lists job information, job opening status, recruiter, the number of applicants, and expenses information. (SQR)	Recruiting, Reports, Job Opening Status, Job Opening Status	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
HRS005 Applicant Listing	This report combines job opening information with a list of candidates being interviewed for the position. It groups requisitions by Department ID. For each candidate interviewed, the report displays the following: employee ID, name, status in the interview process (active, inactive, hired, withdrawn), last interview step completed, and any offers made. (SQR)	Recruiting, Reports, Applicant Listing, Applicant Listing	PRCSRUNCNTL
HRS006 Job Opening Cost Analysis	Provides a breakdown of expense types and amounts for each job opening. (SQR) For each job opening, the report lists the job opening number, job code, position number, status, title of the position offered, and the recruiter's name. The last two columns contain a breakdown of each type of expense incurred and its monetary amount, including a total by job opening number. A department summary includes an expense total for all job openings, each expense category, and calculates a department-average cost- per-hire amount.	Recruiting, Reports, Job Opening Cost Analysis, Job Opening Cost Analysis	PRCSRUNCNTL
HRS007 Salary Package Model	Lists applicant salary package models. (SQR)	Recruiting, Reports, Salary Package Model, Salary Package Model	HRS_RUN_PKG004_APP
HRS010 Vacant Budgeted Positions	Lists all vacant budgeted positions. (SQR)	Recruiting, Reports, Vacant Budgeted Positions, Vacant Budgeted Positions	RUN_HRS010
HRS011 Applicant Summary by Job	For each job opening, this report lists the number of applicants and percentage of total applicants that applied, sorted by source type and specific source. (SQR)	Recruiting, Reports, Applicant Summary by Job, Applicant Summary by Job	PRCSRUNCNTL

Report ID and Report Name	Description	Navigation	Run Control Page
HRS012 Applicant Summary by Source	Lists the number of applicants and percentage of total applicants sorted by source type and specific source. (SQR)	Recruiting, Reports, Applicant Summary by Source, Applicant Summary by Source	PRCSRUNCNTL
HRS013 Works Council Posting	List open job openings monitored by a Works Council. (SQR)	Recruiting, Reports, Works Council Posting, Works Council Posting	HRS_RUN_APP013
HRS014 Job Posting	Shows detailed posting information for a job opening. (SQR)	Recruiting, Reports, Job Posting, Job Posting	HRS_RUN_APP014
HRS032 Full Text Vacancy Report	Generates a hard copy of the full vacancy announcement. (SQR)	Recruiting, Reports, Full Text Vacancy, Full Text Vacancy	RUN_HRS032
HRS034 Job Code and Position Audit	Cross references position numbers and job codes. (SQR)	Recruiting, Reports, Job Code & Position Audit, Job Code & Position Audit	RUNCTL_FGASOFDT
HRS035 Application Analysis (USA)	Analyze information on recruitment and hiring practices. (SQR) Note. The Adverse Impact includes only applicants for whom name, gender, and ethnicity data is available. Additionally, the Eligible to Work in the US check box must be selected on the application, and the application must have been through a standard screening process (not prescreening or online screening) and had the screening results applied. See <i>PeopleSoft HR 9.1</i> <i>PeopleBook: Meet</i> <i>Regulatory Requirements</i> , "(USA) Meeting Regulatory Requirements for the United States," Understanding Adverse Impact Reporting Requirements.	Recruiting, Reports, Application Analysis (USA), Application Analysis (USA)	RUN_CNTL_HRS035

Report ID and Report Name	Description	Navigation	Run Control Page
HRS036 Application Details	Displays application data for applicants. (SQR)	Recruiting, Find Applicants Select the <i>Print Application</i> <i>Details</i> action in the Group Action field under the Search Results grid on the Find Applicants page or other pages that support applicant actions.	HRS_RUN_HRS036
HRS037 Pre-Screening Activity Report	List applicants who have been pre-screened during the online application process, and show each applicant's pre-screening results and disposition. (SQR)	Recruiting, Reports, Pre- Screening Activity Report, Pre-Screening Activity Report	HRS_RUN_HRS037
HRS816 Priority Placement Table (USF)	List the valid priority placement values. (BIP, Crystal)	Recruiting, Reports, Priority Placement Table, Priority Placement Table	PRCSRUNCNTL
HRS820; HRS82B, HRS82C Candidate Evaluations List (USF)	Produces an Evaluation of Candidate reports. The three different versions of the report display the same information using different sorting rules. HRS820 sorts by applicant ID, HRS82B sorts by applicant name, and HRS83C sorts by score. BIP, Crystal)	Recruiting, Reports, Candidate Evaluations List, Candidate Evaluations List	HRS_RUN_HRS820
HRS821 Certificate of Eligibles (USF)	Generates a Certificate of Eligibles report. (BIP, Crystal)	Recruiting, Reports, Certificate of Eligibles, Certificate of Eligibles	HRS_RUN_HRS821

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